

Integration Builder (Workato) Resource Guide

Training and certifications for using Workato

For an understanding of using Workato, [Automation Pro I](#) and [Automotion Pro II](#) from Workato are required before building using Integrations Builder.

Overview


The resource guide below will explain the following functions of the Onit App on Workato.

- Establishing the necessary Onit connections
- Add a comment to a record
- Approve or reject a record
- Create new record
- Find or Create new record
- Get a document (file) by id
- Get record by id
- Search records
- Update existing record

Set Up a Connection

In order to use the Onit App on Workato, it is necessary to first set up a connection as seen below. The following must be added Connection name, Connection type, App Builder production subdomain and Authorization Token for a user with the "API User" role.

Recipe
Jobs
Connections
Versions
Settings



CONN - support
Reusable Connections

CONN - support
Switch

Connection name *

CONN - support

Name your connection. You can reuse it in other recipes.

Connection type *

Cloud


If you want to connect using an on-prem group, please choose one from the dropdown. [Learn more](#)

App Builder production subdomain *

support

https://.onit.com

Auth Token *



The auth token for an API or System Admin

Advanced

No value selected

Do not use!

Disconnect

Actions of the Onit Connector App

Below are the all the actions that the Onit Connector App can perform.

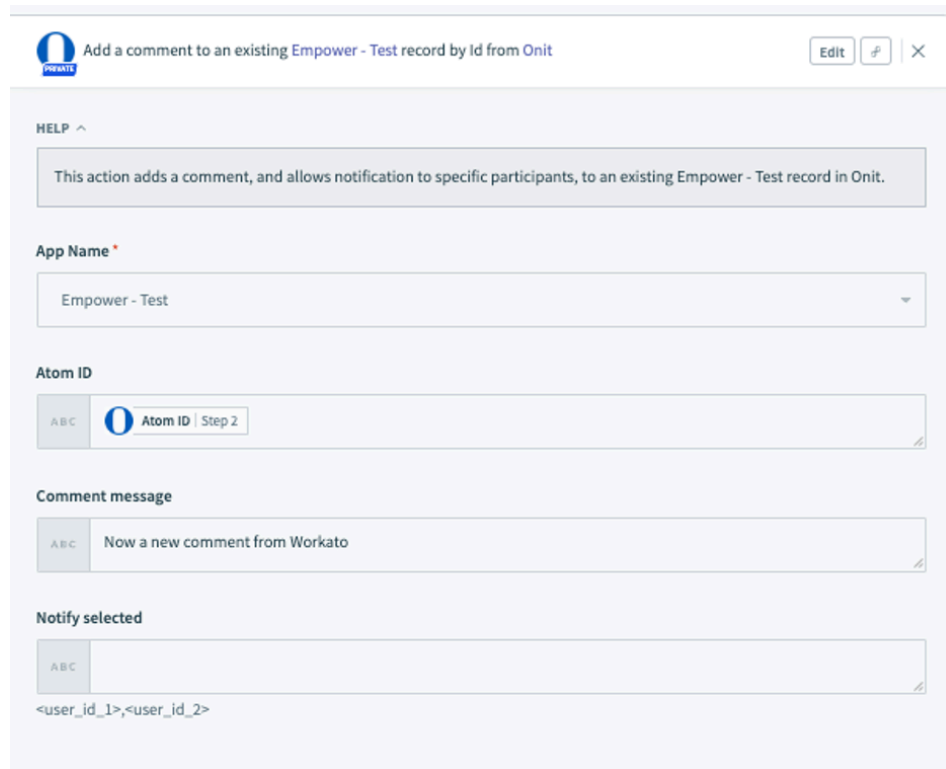
Add a comment to a record Add a comment to an existing record in a given Onit App by Id
Approve or reject a record Approve or reject a record in a given Onit App by Id
Create new record Create a new record in a given Onit App
Find or create new record Find or create a new record in a given Onit App
Get a document(file) by id Download the name and contents of a file using a document id
Get record by Id Get an existing record in a given Onit App by Id
Search Records Search records in a given Onit app using search criteria
Update existing record Update an existing record in a given Onit App

Add a Comment to Existing Record

In the Add a comment to existing record action, you can notify specific participants of your comment.

App Name refers to the source app in Onit App Builder and must be selected.

You can then add in the Atom ID. Write in your comment message and list the email address of who you want to share it with in Notify selected.




The screenshot shows a configuration window titled "Add a comment to an existing Empower - Test record by Id from Onit". The window includes a "HELP" section with a description: "This action adds a comment, and allows notification to specific participants, to an existing Empower - Test record in Onit." Below this, there are four main configuration fields: "App Name" (a dropdown menu currently showing "Empower - Test"), "Atom ID" (a text field containing "ABC" and a button labeled "Atom ID | Step 2"), "Comment message" (a text field containing "Now a new comment from Workato"), and "Notify selected" (a text field containing the placeholder "<user_id_1>,<user_id_2>"). Each field has a small "ABC" icon on the left and a pencil icon on the right for editing.

Approve or Reject an Existing Record

The Approve or reject an existing record by Id action allows you to register the given participant's approval decision on the atom.

After selecting the Source App, you must list the specific Atom Id and email of user making the approval or rejection. You must also select the approval type.

 Approve or reject an existing Empower - Test record by Id from Onit

Edit | # | X


HELP ^

This action approves or rejects an existing Empower - Test record in Onit for a given participant on the atom.


App Name *

Empower - Test

Atom ID

ABC  Atom ID | Step 2

Email of user making the approval or rejection

ABC  approver_email | Step 4


Approval Type

Approve

Create a New Record

The Create a new record in Onit App allows you to create a record in Onit.

After selecting the source app, you must specify content in the fields.

 Create a new Empower - Test record in Onit

Edit | # | X

HELP ^

This action creates a new Empower - Test record in Onit.

App Name *

Empower - Test

Atom

Hide

requester_email

ABC

requester_name

ABC

name

fx workato.uuid

field_a

ABC Foo

field_b

ABC Bar


field_c

ABC Baz

Find or Create a New Record

The Find or create a new record action in the Onit App allows you find an existing record with supplied value and update the record with the provided values. If no record with supplied value is found, it will create a new record.

After selecting the source app, you must state the Lookup Field, Lookup value and values you want added.



Find or create a new Empower - Test record in Onit

Edit

×

HELP ^

This action uses a given key field and supplied value to try and find an existing record with that value. If it finds it, it will update the found record with provided values. Otherwise it will create a new Empower - Test record in Onit.

App Name *

Empower - Test

Lookup Field

name

Lookup value

ABC

foo

Atom

Hide

attachment_field

Hide

File name

ABC

File name | Step 8

File mime type

ABC

File mime type | Step 8

File contents

ABC

File contents | Step 8

requester_email

ABC

requester_name

ABC

name

ABC

Find or Create from Workato with Document Persisted in Workato

field_a


fx

workato.uuid

Download the Name and Contents

Download the name and contents of a file using a document id action does just that.

You must enter the Document ID.




The screenshot shows a configuration window for the action "Download the name and contents of a file using a document id". The window has a title bar with the Onit logo and the text "Download the name and contents of a file using a document id". In the top right corner, there are buttons for "Edit", a share icon, and a close icon (X). Below the title bar, there is a "HELP ^" link. A light blue box contains the text: "This action downloads the name and contents of a file using a document id". Underneath, the label "Document ID" is followed by a text input field. The input field has a placeholder "ABC" and a button with the Onit logo and the text "Document ID | Step 7".

Get Record by Id

Get an existing record by Id action retrieves the details on an existing record in Onit.

After selecting the source app, you must put in the Atom ID to retrieve it's data. Using this action, you can upload the contents of one attachment field at a time. The rest can be accessed using the Get Document action.

 Get an existing Empower - Test record by Id from Onit Edit ×


HELP ^

This action retrieves the details on an existing Empower - Test record in Onit.

App Name *

Empower - Test ▼

Atom ID

ABC  Atom ID | Step 2


Attachment field to pre-fetch

No value selected ▼

Search Records

The Search records using search criteria action is used to search records in Onit and can limit results based on the filter criteria provided.

After selecting the source app, the filter criteria can be added and additional information on how the list of results is returned can be provided. The additional fields include: fields to return, page size, page start, field to sort on, sort direction, attachment_field...

 Search Empower - Test records using search criteria from Onit

Edit
#
X

HELP ^

This action searches Empower - Test records in Onit. Search criteria can be used to limit the results, and specific fields can be selected.

App Name *

Empower - Test

Filter criteria

ABC

[[{"property": "name", "operator": "like", "value": "Test Record With an Attachment", "type": "string"}]]

[[{"field": "<field name>", "type": "<field type>", "comparison": "<operator (if applicable)>", "value": "<value>"}]]

Fields to return

No value selected

Page Size

0.00

Page Start

0.00

Field to Sort on

No value selected

Sort Direction

No value selected

Atom

Hide

attachment_field

Hide

File name

ABC

File name | Step 8

File mime type

ABC

File mime type | Step 8

File contents

ABC

File contents | Step 8

requester_email

ABC

requester_name

ABC

name

ABC

Find or Create from Workato with Document Persisted in Workato

field_a

fx

workato.uuid


Update Record

The Update an existing record action updates a record in Onit.

After selecting the source app and adding the Atom Id, additional fields can be entered to update the record in Onit.

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 Update an existing Empower - Test record in Onit

Edit # X


HELP ^

This action updates an existing Empower - Test record in Onit.

App Name *

Empower - Test

Atom Id

ABC  Atom ID Step 2

Atom

Hide

attachment_field

Show

requester_email

ABC

requester_name

ABC

name

ABC

field_a

ABC Update Field A from Workato