Integrating Enterprise Service Management Chatbot with Workday Using Workato

At a Glance

A pioneer in AI for enterprise service management approached Harbinger to integrate their chatbot app with Workday through a Workato custom connector. We developed a Workato custom connector and Workato recipes to integrate the chatbot app with Workday.

Key Highlights

- Workato custom connector for client's chatbot app

- Bulk sync of employee data from Workday to the client system

- Easy employee onboarding and look up of employee data

- Modular/reusable implementation using recipe functions

- Robust error and exception handling

Business Need

Our client was looking to integrate their system with Workday through a Workato custom connector to facilitate the use cases given below:

- ❑ Facilitate employee onboarding

- ❑ Look up employee data

- ❑ Manage expense reports

- ❑ Look up purchase order status

- ❑ Check the status of background checks

- ❑ Filter users based on configurable criteria

About the Client

A pioneer in AI for enterprise service management and automating digital workplace assistance. They redefine how employees get help by delivering exceptional employee experiences. They were named a Leader in the Forrester Wave: Chatbots for IT Operations, Q4 2022. Their virtual support agent brings the ease of consumer virtual assistants into the workplace. It automates the resolution of employee questions, issues, and requests with personalized experiences.

Business Need

Our client needed one-time bulk sync of employee data from Workday to the client system. Thereafter, they needed real-time sync of new, updated, and terminated employees. Furthermore, there was a need to automate some of the frequent workflows for the end users.

The chatbot app did not have any support for some of the frequent queries from users. Our client used manual employee onboarding workflows before approaching Harbinger. They had to export users from Workday and manually import them into their system, which was a manual, error-prone process.

There was a sheer need to eliminate the tedious manual approach by automating the workflows and building a Workato custom connector and Workato recipes that support bulk sync as well as real-time employee data sync.

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Solution Details

The first part of our solutioning approach was to clearly understand the workflow of each use case mentioned earlier. Then we successfully developed a Workato custom connector and Workato recipes for integrating the client's chatbot app with Workday. These recipes were built for each of the various use cases. We used recipe functions to enable modular implementation.

We adopted the following implementation approach:

Step 1: Use case understanding and API analysis

Step 2: Mapping of entities and attributes

Step 3: Custom Connector development

Step 4: Recipe development

Step 5: Customer Workato account management

Step 6: Testing and deployment

Solution Details

Bulk employee data sync from Workday to the client system needed its own recipe design effort due to the processing of large data. We faced performance issues with Workday API response and had to deal with input limits in the destination client system and recipe timeouts.

We had to brainstorm, adjust, and make appropriate changes to overcome these challenges. We analyzed and figured out the optimal batch size for processing employee data while ensuring optimal task utilization in Workato.

Employee sync needed configurable filtering on certain parameters like job location and title. We used look up tables and recipe functions to make it easily configurable and reusable across the required use cases.

Technology

> Workato Recipes

> Workato Custom Connector using Ruby

> JSON

> REST APIs

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Result

Custom Workato connector for the client's chatbot app

Real-time sync of new/updated/terminated users from Workday to the client system

Workato recipes to integrate the chatbot and Workday

Customer account (tenant) management in Workato

Automation of frequent workflows

Bidirectional data flow from the chatbot to Workday and vice versa

One-time bulk sync of users from Workday to the client system

Recipes management in Workato