Digital Assistant Integrations & Use Cases
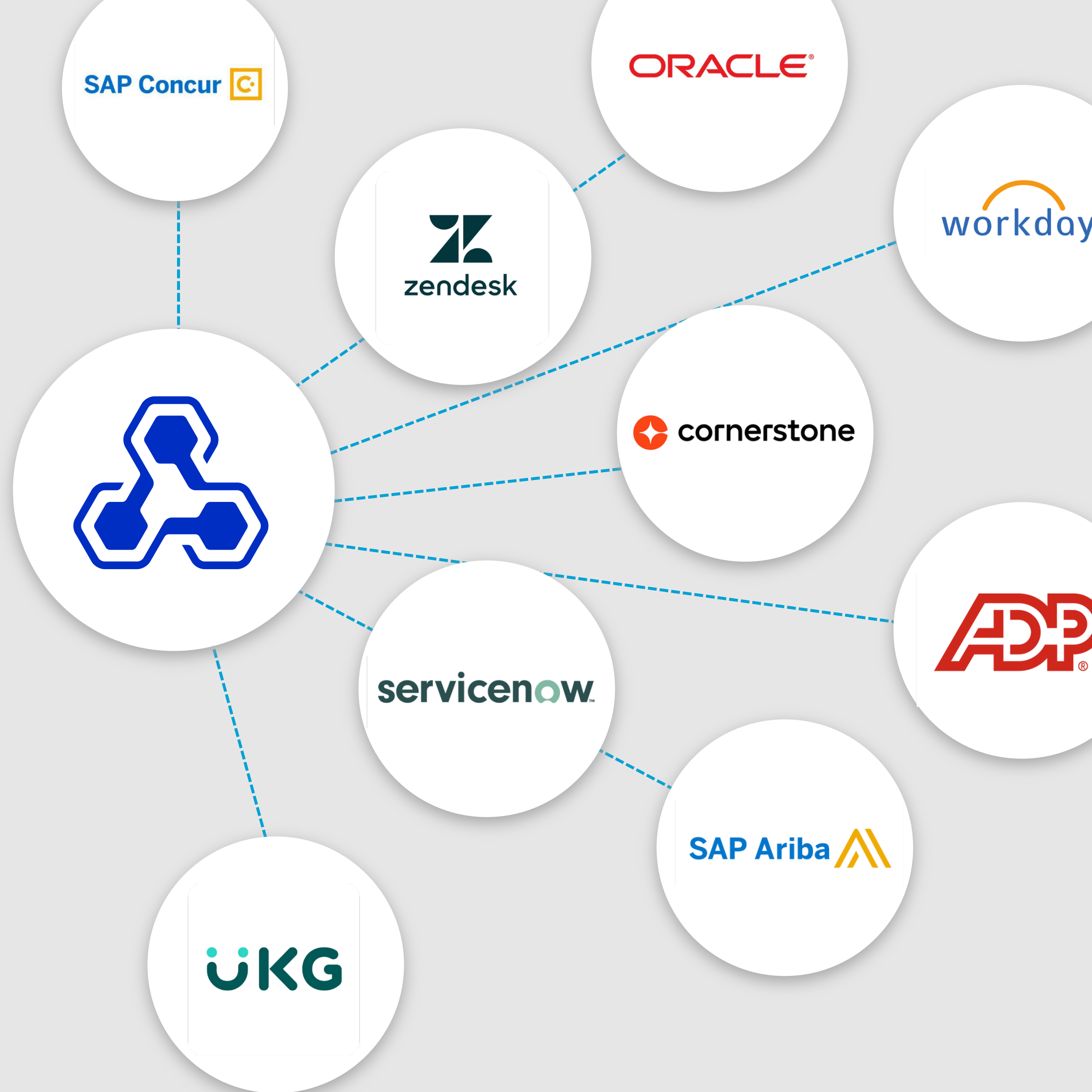
SAP Concur

ORACLE

zendesk

workday

cornerstone

ADP

servicenow

SAP Ariba

UKG

Digital Assistant Use Cases

The Digital Assistant guides employees' attention to what they need to know and do. It abstracts data, notifications, and tasks from critical business systems. The digital assistant shows up as an omnipresent toolbar that sits on top of, or within, your existing intranet.

Use Cases Available Out-of-the-Box

- Expense requests and approvals
- Procurement requests and approvals
- HCM approvals
- Timesheet approvals & reminders
- Payday balance and notifications
- Time off balance and notifications
- Sales opportunity status notifications
- Training reminders and notifications
- Travel itinerary reminders
- IT request notifications
- Onboarding communications
- Change management notifications

- ITSM ticketing
- People Search
- Time planner
- Time off recommendations (coming soon)
- Igloo Software apps
- Framer app
- My Day app
- Chatbot Q&A
- One-time and recurring communications
- Custom excel content
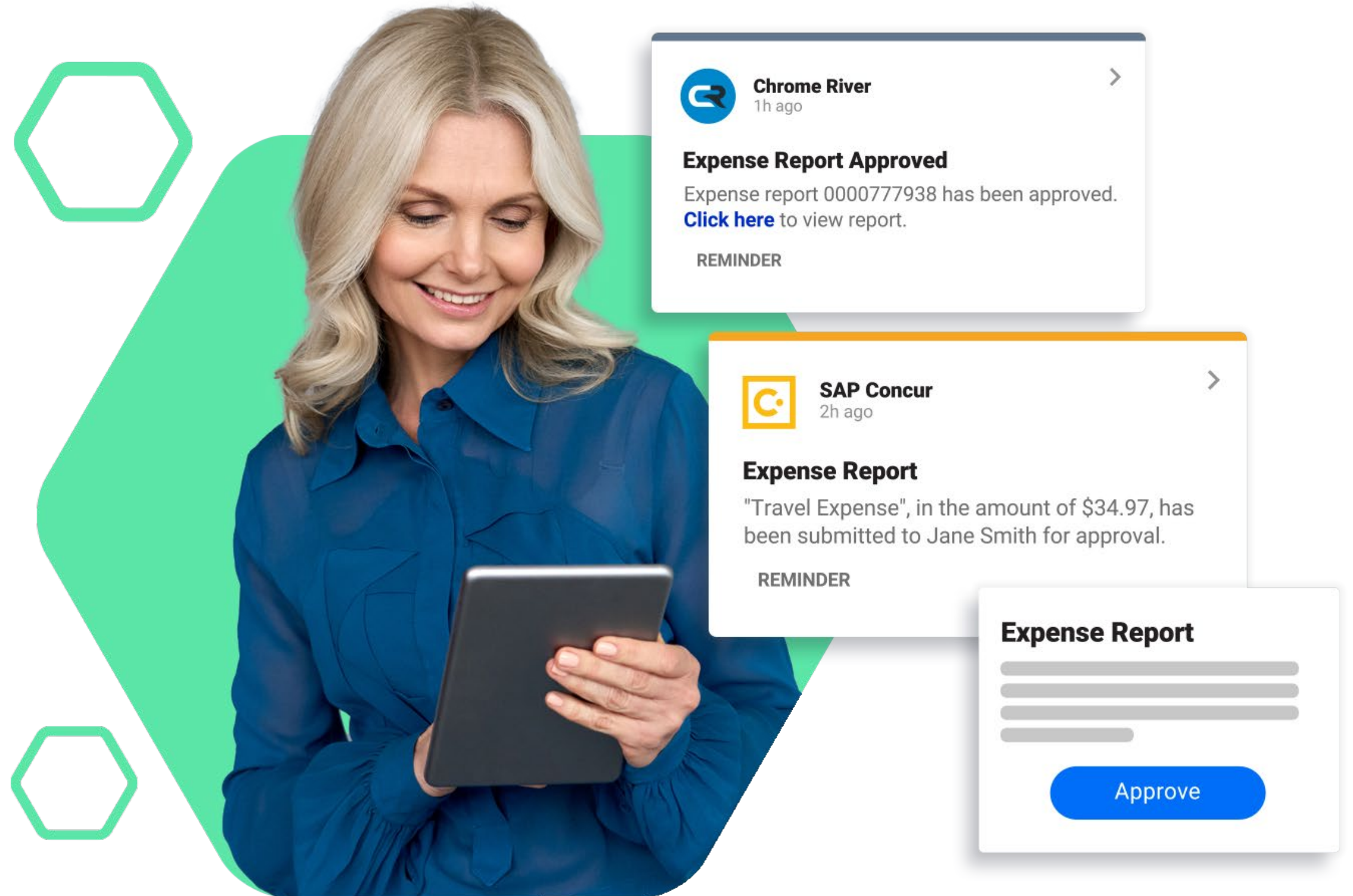- Café Menu
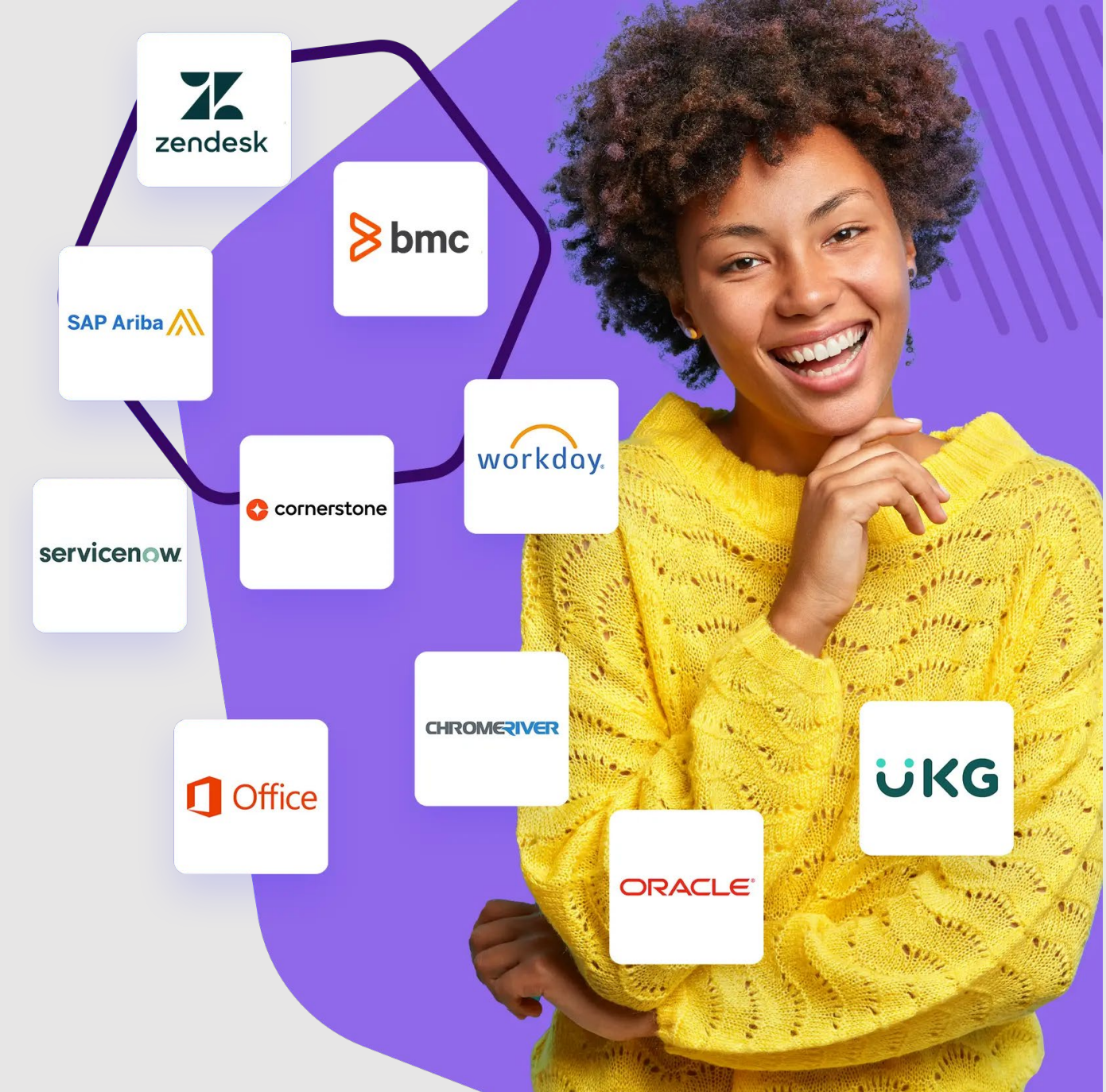
Expense Approvals & Notifications

Eliminate the risk of time-sensitive approvals getting lost in email inboxes, reduce delays in manager approvals, and give employees back valuable time in their day with simple, streamlined experiences for managing expenses.

Review and act on expense reports.

- Approvers will receive a smart notification alerting them of a new expense report with a high-level detail of the report. From the digital assistant, approvers can approve or reject the expense report or follow the link to the expense management system for more details, as necessary.

Get real-time alerts on status updates

- Provide employees who submitted expense reports smart notifications for status updates including when the expense report has been approved, rejected, and submitted.
.

Chrome River
1h ago
Expense Report Approved
Expense report 0000777938 has been approved.
Click here to view report.
REMINDER

SAP Concur
2h ago
Expense Report
"Travel Expense", in the amount of $34.97, has been submitted to Jane Smith for approval.
REMINDER

Expense Report

Approve

Out-of-the-box apps available for

SAP Concur   emburse chromeriver

Procurement Approvals & Notifications

Simplify approvals by removing the multi-step process of logging in to numerous systems and streamlining approvals into one notification stream, where managers can approve or reject requests in just one click.

Manage approvals and request

- Review and act on procurement and approval request notifications. Approvers will receive smart notifications when procurement or purchase request require their approval. The smart notification will include a high-level summary and the ability to approve, reject and add comments right within the smart notification.

Get real-time alerts on status updates

- Provide employees who submitted expense reports smart notifications for status updates including when the expense report has been approved, rejected, and submitted.

Out-of-the-box apps available for
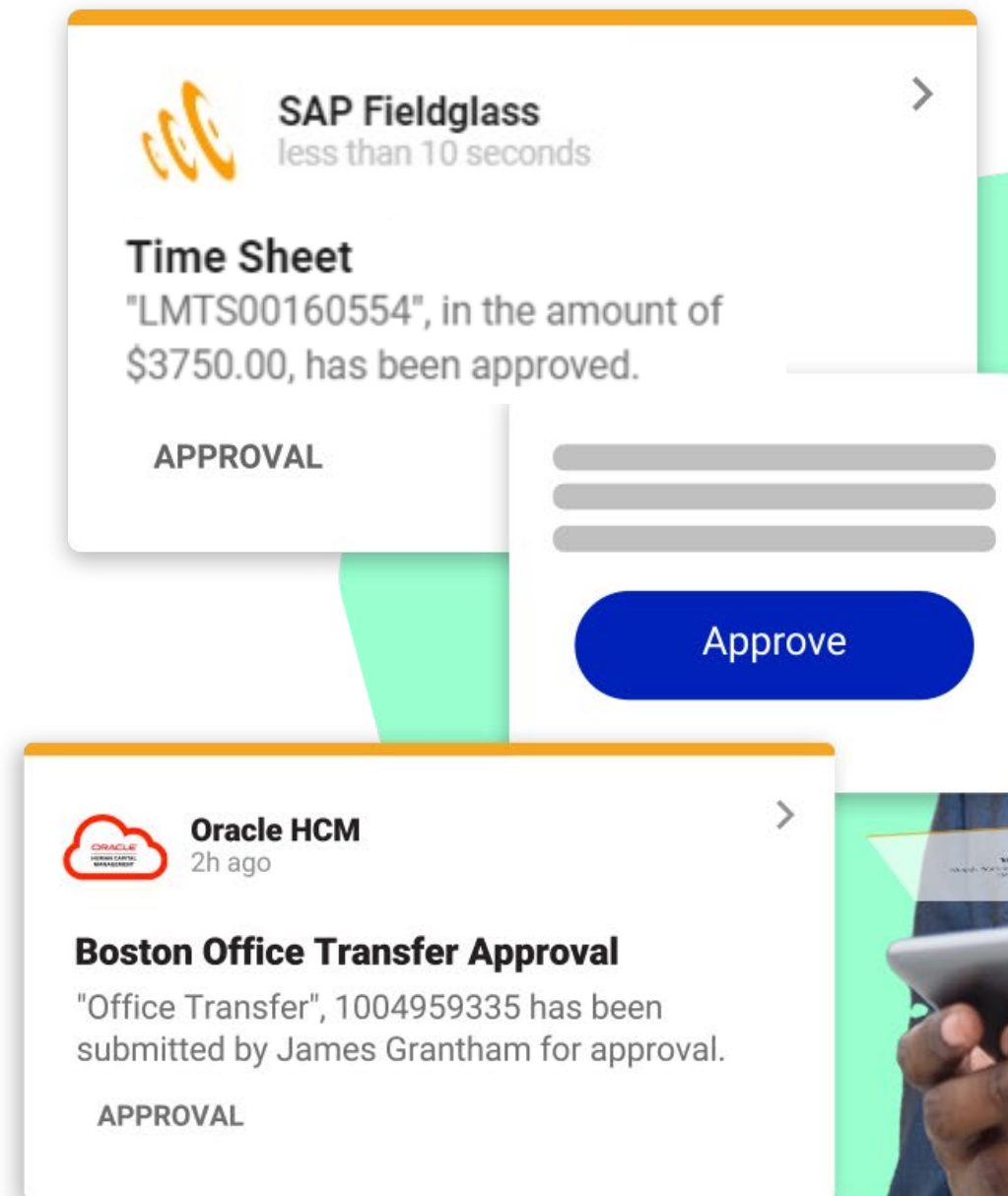
SAP Ariba   servicenow.

HCM Approvals

Workgrid integrates with leading enterprise applications to help employees track and manage HCM approvals

Manage promotion and transfer request

- Review and act on HR requests, including promotion requests, transfer requests, and new hire requests from Oracle HCM.

Get real-time alerts on status updates

- Provide employees who submitted requests status updates including when the request has been submitted, approved, or rejected. Status updates will show up as a To Know smart notification.

SAP Fieldglass
less than 10 seconds

Time Sheet
"LMTS00160554", in the amount of $3750.00, has been approved.

APPROVAL

Approve

Oracle HCM
2h ago

Boston Office Transfer Approval
"Office Transfer", 1004959335 has been submitted by James Grantham for approval.

APPROVAL

Out-of-the-box apps available for

ORACLE®
HUMAN CAPITAL MANAGEMENT

Timesheet Approvals & Reminders

Workgrid integrates with leading enterprise applications to help employees track and manage time-sensitive approvals.
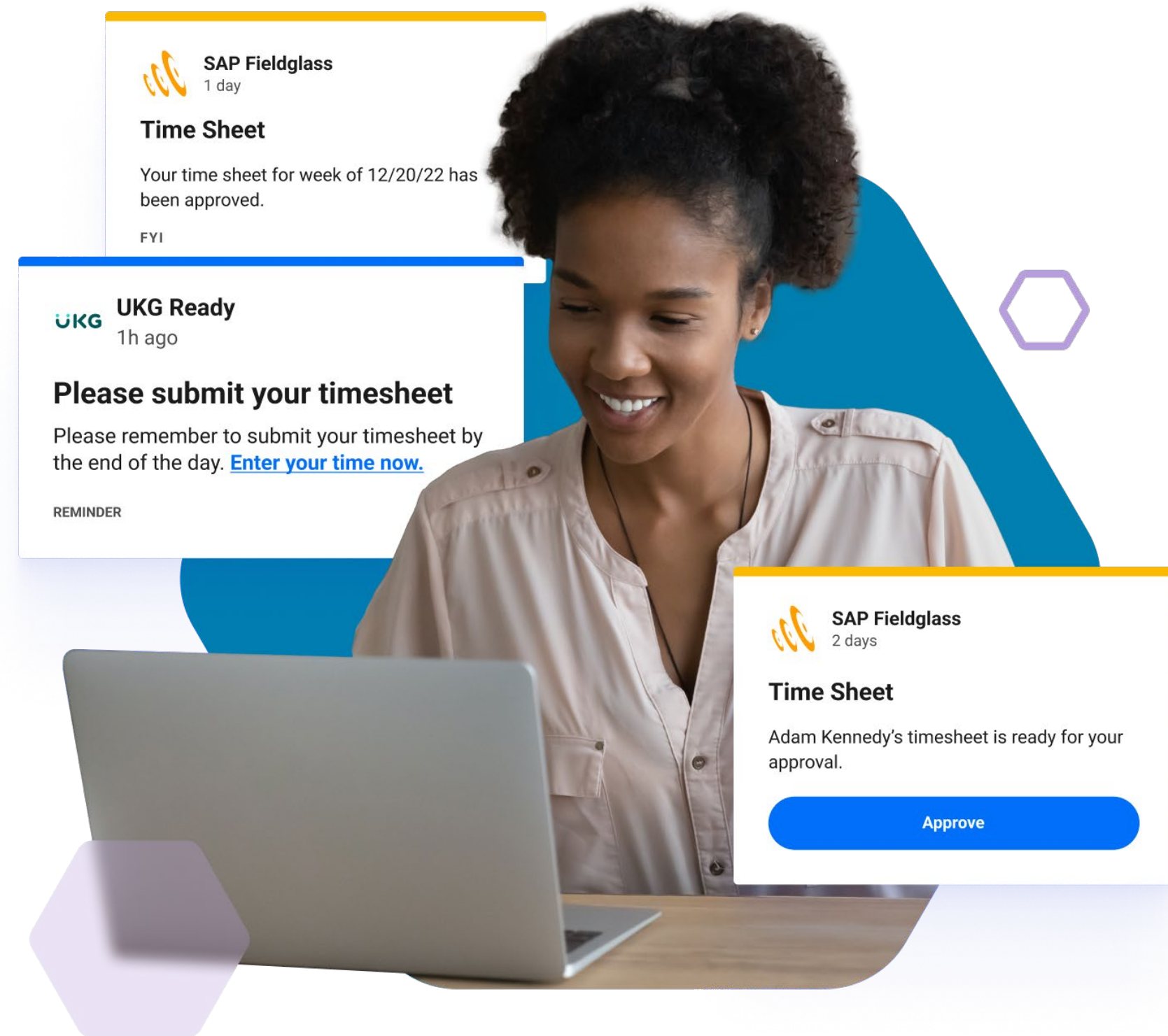
Manage Timesheet Approvals
- Give managers the ability to quickly and easily review and approve or reject time sheet approvals via a smart notification.

Receive Timesheet Updates
- Employees who submitted the time sheet would also receive a smart notification when their time sheet has been approved.

Timesheet Reminders*
Help remind employees to submit their timesheets. Employees will receive a smart notification at 4pm each work day reminding employees to fill out their timesheet if they haven't already submitted it.

SAP Fieldglass
1 day

Time Sheet

Your time sheet for week of 12/20/22 has been approved.

FYI

UKG Ready
1h ago

Please submit your timesheet

Please remember to submit your timesheet by the end of the day. Enter your time now.

REMINDER

SAP Fieldglass
2 days

Time Sheet

Adam Kennedy's timesheet is ready for your approval.

Approve

Out-of-the-box apps available for

ūKG   SAP Fieldglass

Timesheet reminders are currently only supported for UKG Ready

* Timesheet approvals are currently only supported for SAP Fieldglass
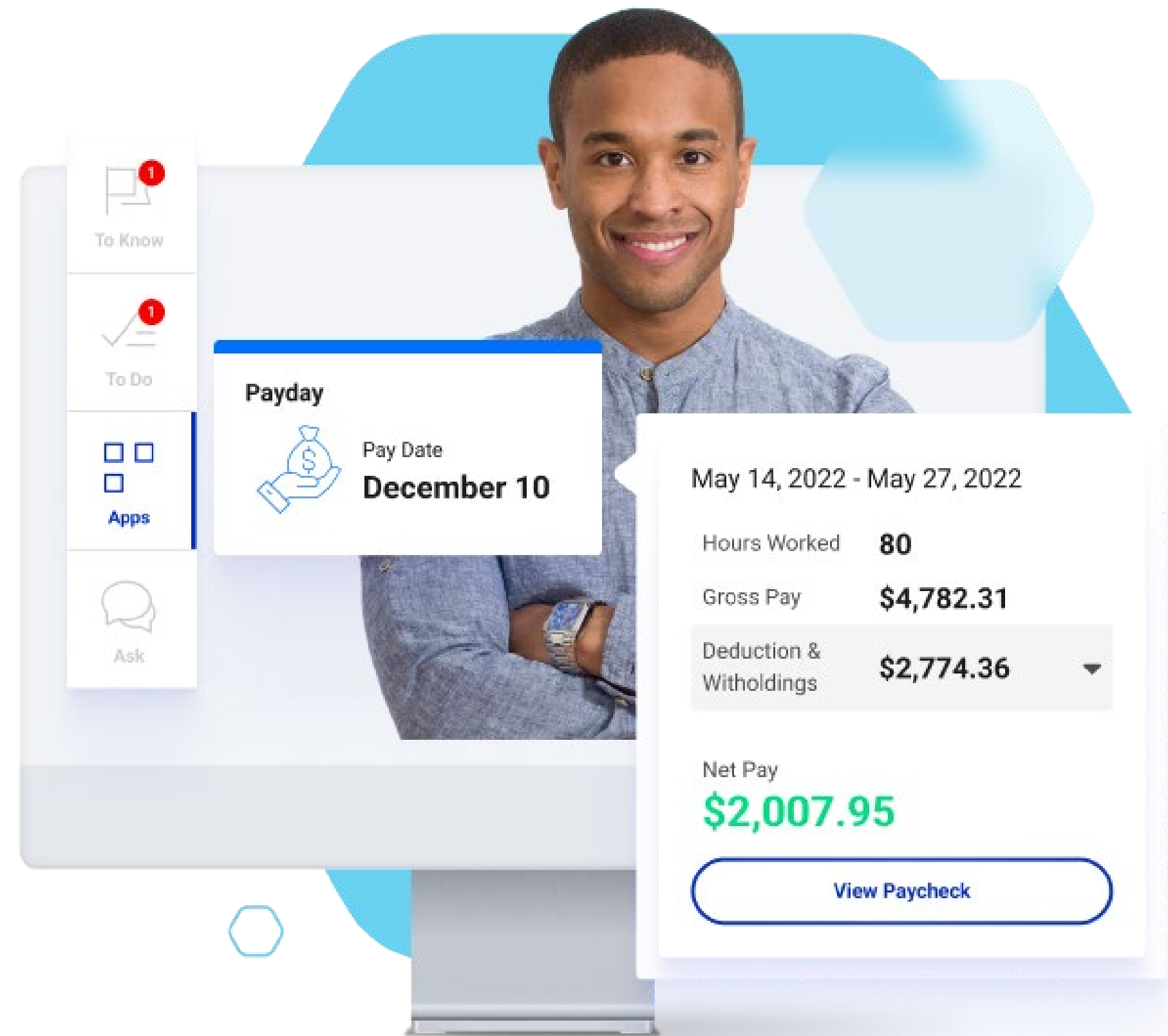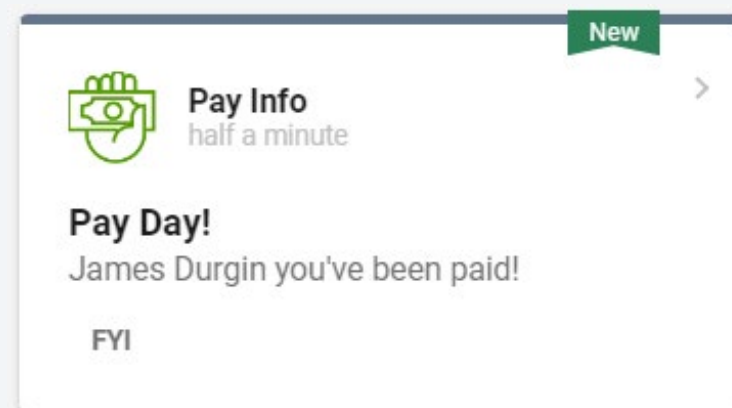
Payday Balance & Notifications

Provide employees easy access to paycheck data.

Microapp- Streamline access to pay data
- Provide employees with a persistent microapp that is always available to display their latest paycheck summary.

Smart Notification- Proactively send notifications when new payslip is available
- Provide employees with a smart notification when a new payslip is available. The smart notification will also display a summary of their payslip.

New

Pay Info
half a minute

Pay Day!
James Durgin you've been paid!

FYI

To Know

To Do

Apps

Ask

Payday

Pay Date
December 10

May 14, 2022 - May 27, 2022

Hours Worked   **80**

Gross Pay   **$4,782.31**

Deduction & Witholdings   **$2,774.36**

Net Pay
$2,007.95

View Paycheck

Out-of-the-box apps available for

ÜKG   PAYCHEX®   UltiPro®

Time Off Balance

Provide employees with easy and quick access to their current time off balance.

Microapp- Streamline access to time off balances

- Provide employees with a persistent microapp that is always available to display their current time off balance.

Smart Notification- Proactively send notifications

- Provide employees with a smart notification that provides an at-a-glance view of their time off balance encouraging employees to take time off and focus on their well-being.
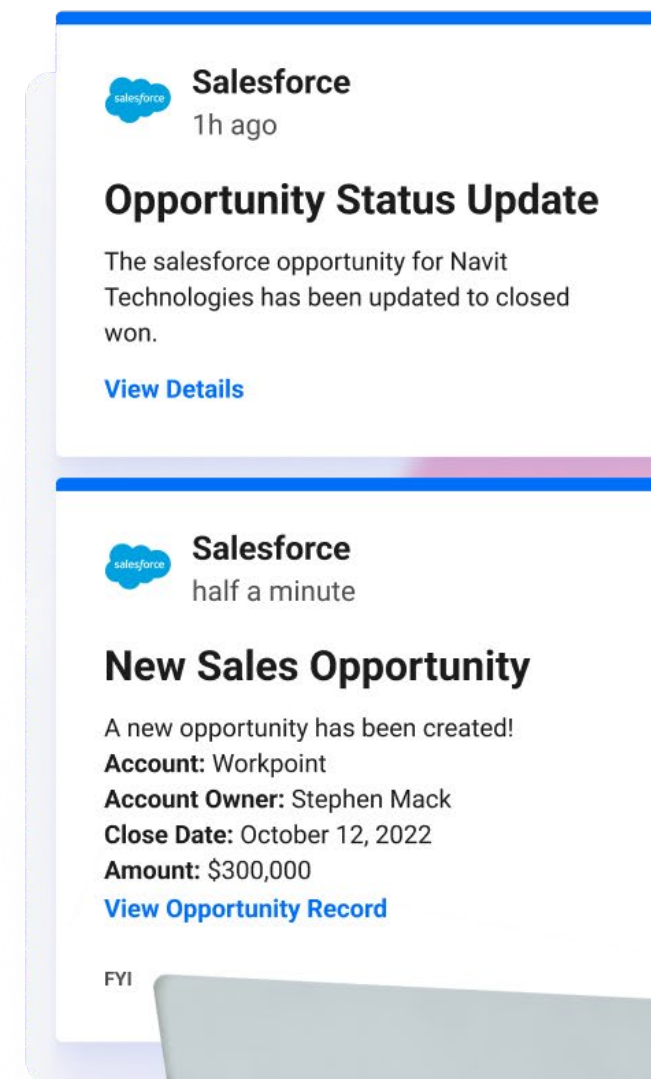

Out-of-the-box apps available for

UKG   PAYCHEX   UltiPro
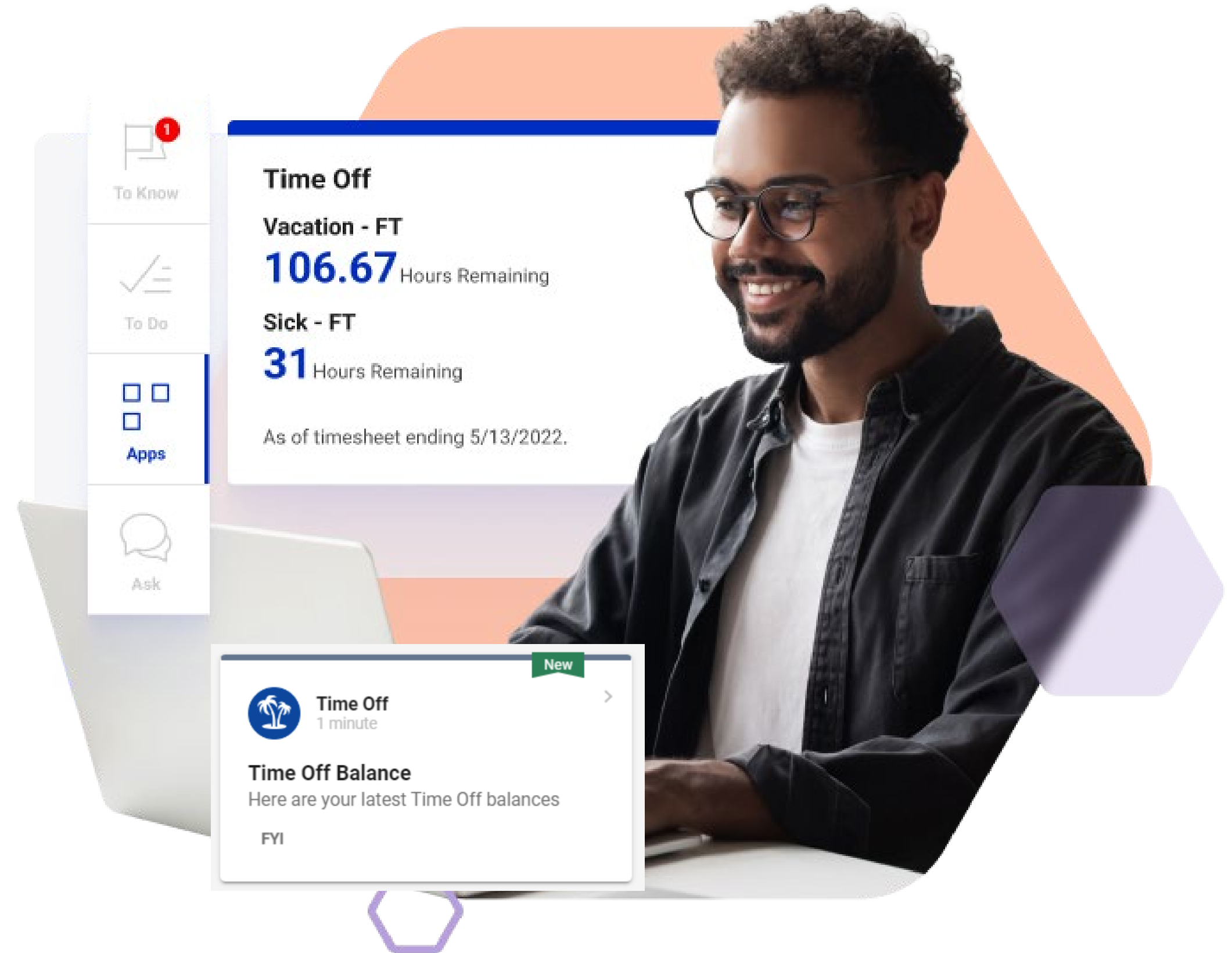
CRM Opportunity Alerts

Alert employees when a sales opportunity stage has been updated.

Proactively alert employees of new sales opportunities and when existing opportunities have status updates.

- The sales opportunity notification alerts employees when an opportunity stage has been updated and includes dynamic information from the opportunity such as amount and size.

Salesforce
1h ago

Opportunity Status Update

The salesforce opportunity for Navit Technologies has been updated to closed won.

View Details

Salesforce
half a minute

New Sales Opportunity

A new opportunity has been created!
Account: Workpoint
Account Owner: Stephen Mack
Close Date: October 12, 2022
Amount: $300,000
View Opportunity Record

FYI

Out-of-the-box apps available for

salesforce

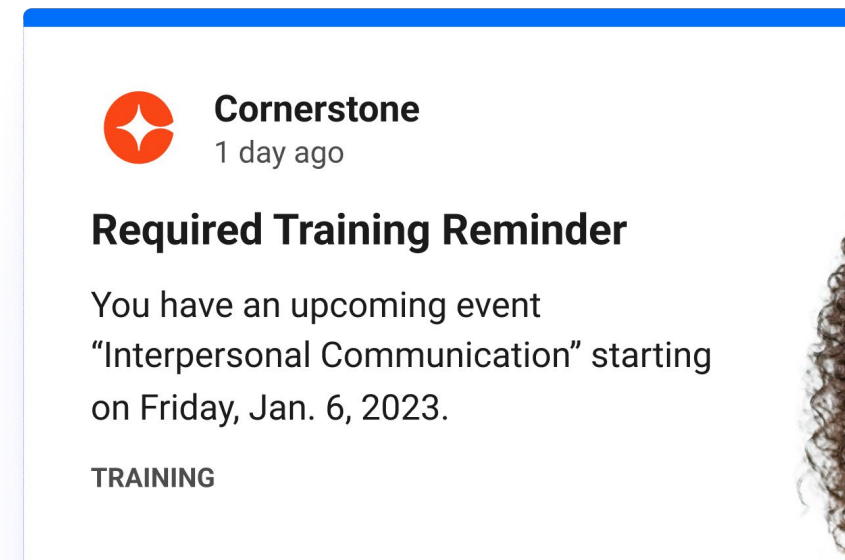# Training Reminders & Notifications

Deliver personalized training notifications and reminders without having to compete with the clutter of an email inbox.

Training Notifications

- Employees will receive a smart notification when they've been assigned a training and confirmations for training they have registered for.

Training Reminders

- Employees will receive reminders of upcoming training five days prior to their upcoming training and/or one day after training is overdue. The smart notification will include details of the training and the ability to launch the training right from the smart notification.
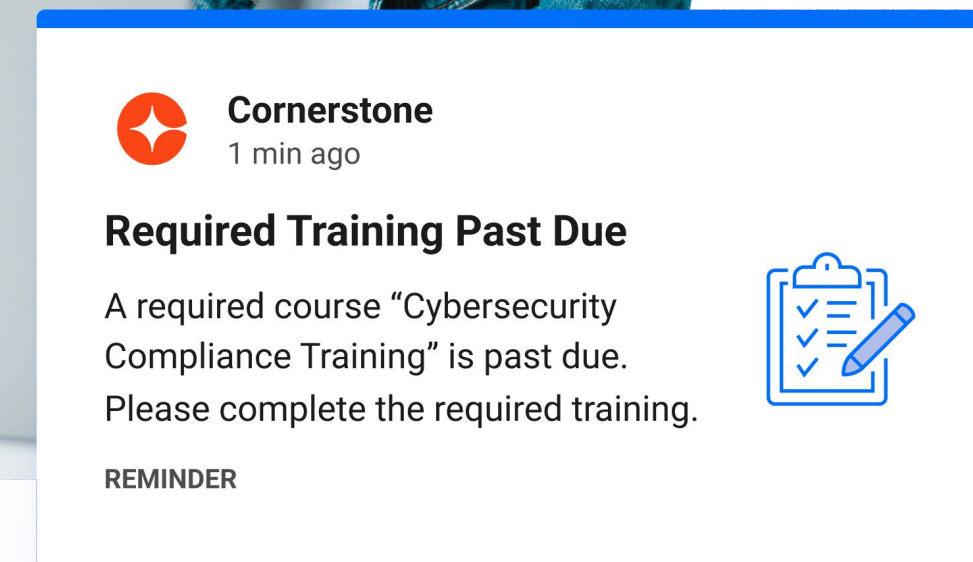
Cornerstone
1 day ago

Required Training Reminder

You have an upcoming event "Interpersonal Communication" starting on Friday, Jan. 6, 2023.

TRAINING

Cornerstone
1 min ago

Required Training Past Due

A required course "Cybersecurity Compliance Training" is past due. Please complete the required training.

REMINDER

Out-of-the-box apps available for

✦ cornerstone

Travel Itinerary Reminders

Travel reminders

- Employees will receive a reminder via a smart notification of upcoming travel plans with details of their itinerary. The timeframe of when the notification is sent can be customized.

- The notification can also be customized to include any additional information or resources that may be relevant to your organization travel such as travel policies.
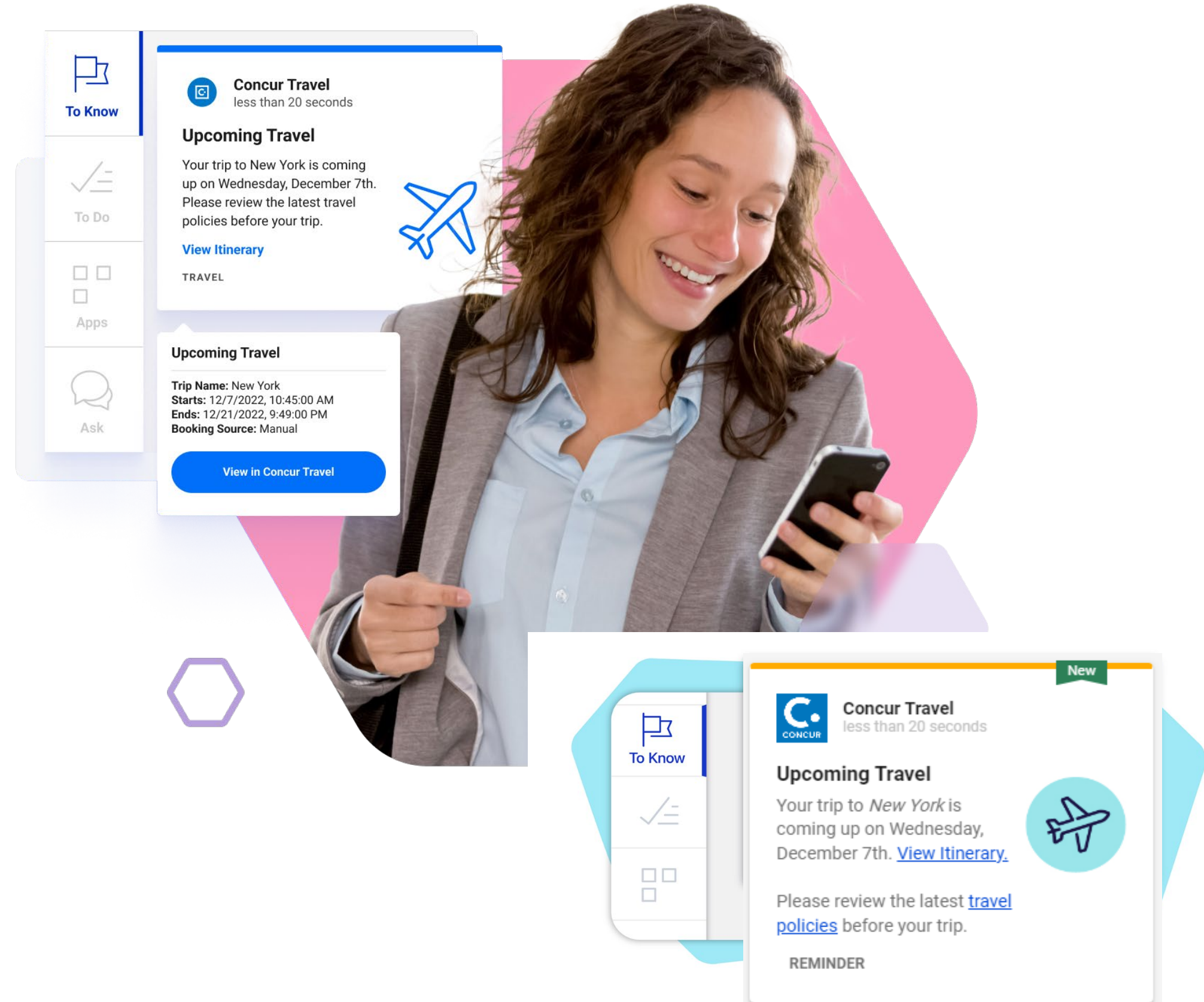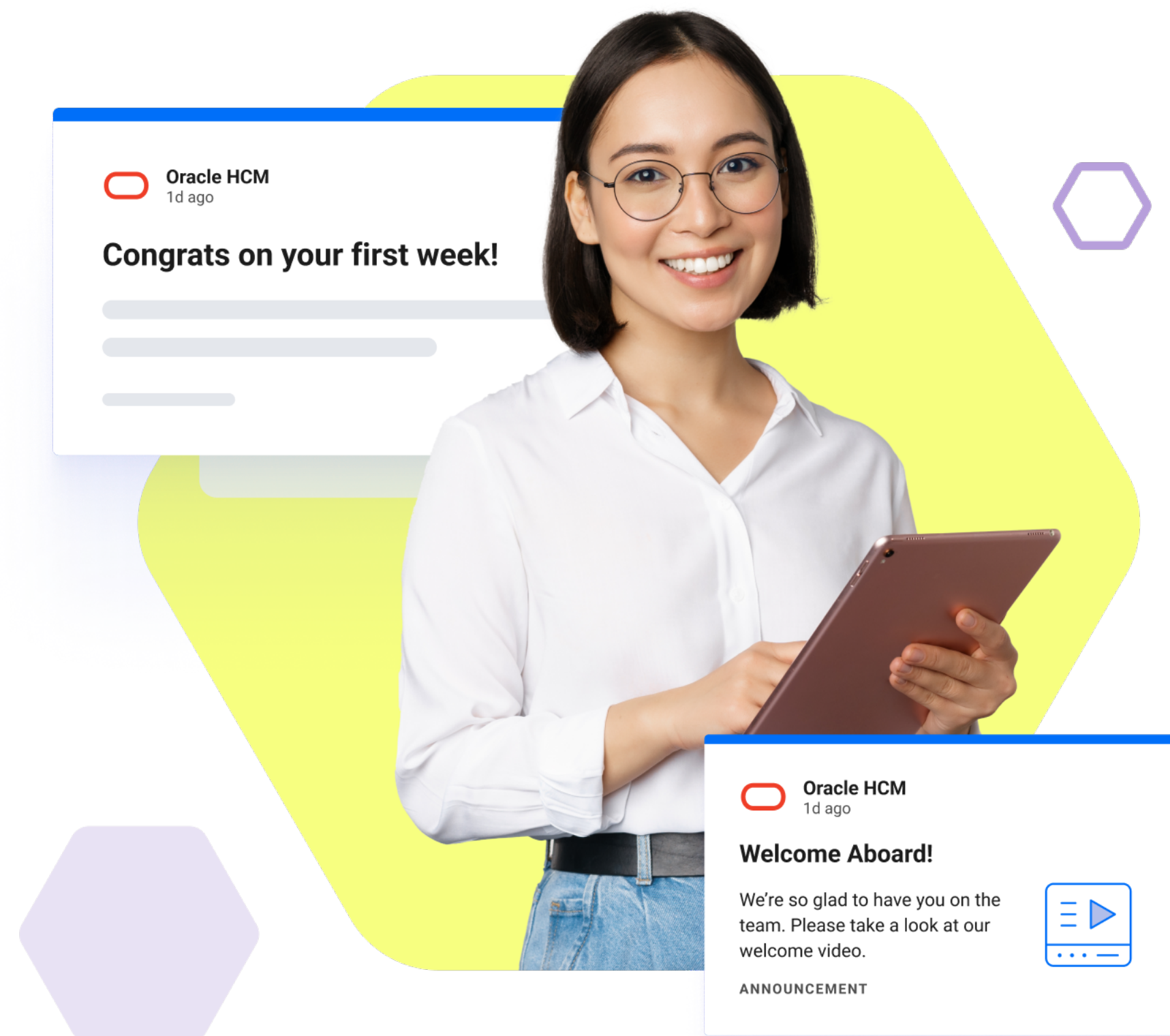
Out-of-the-box apps available for

SAP Concur

Onboarding Communications

Create a workflow of communications to provide new hires with the right information when they need it.

Create custom notifications with supporting resources to help new hires feel welcomed, connected, and engaged.

- Smart notifications can be customized to different time frames throughout the on-boarding journey.
- The pre-built template includes a workflow that allows for communications to be customized and triggered on the employee's first day, first week and first month.
- Include messages, links to resources, videos, and more!

Oracle HCM
1d ago

Congrats on your first week!

Oracle HCM
1d ago

Welcome Aboard!

We're so glad to have you on the team. Please take a look at our welcome video.

ANNOUNCEMENT

Out-of-the-box apps available for

Change MGMT. & Incident MGMT.

Give employees quick access to information from popular ITSM systems like ServiceNow, Atlassian Jira, and Zendesk, to streamline incident and change management tickets.

Keep employees informed on IT Support Tickets

- Employees will receive smart notifications that inform employees on the status of their IT support tickets and change management, helping keep them informed as the ticket moves through different stages of the ticket and when comments have been added.

- Smart notifications are triggered when a ticket's status has been changed or a comment has been added.
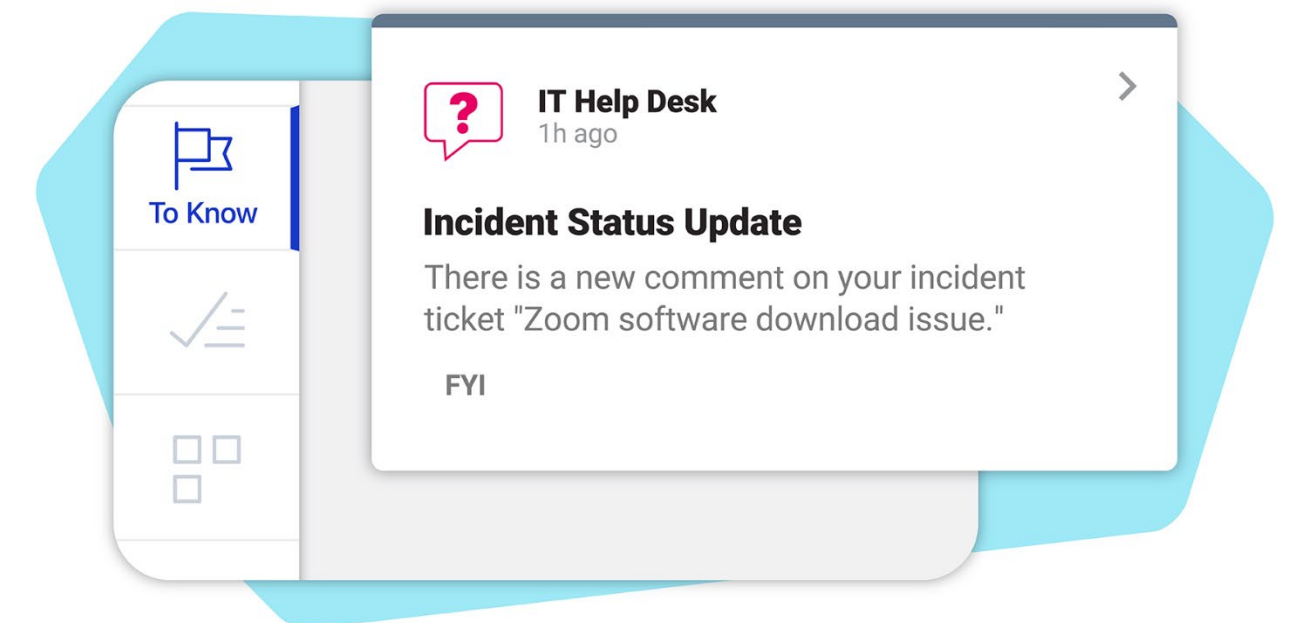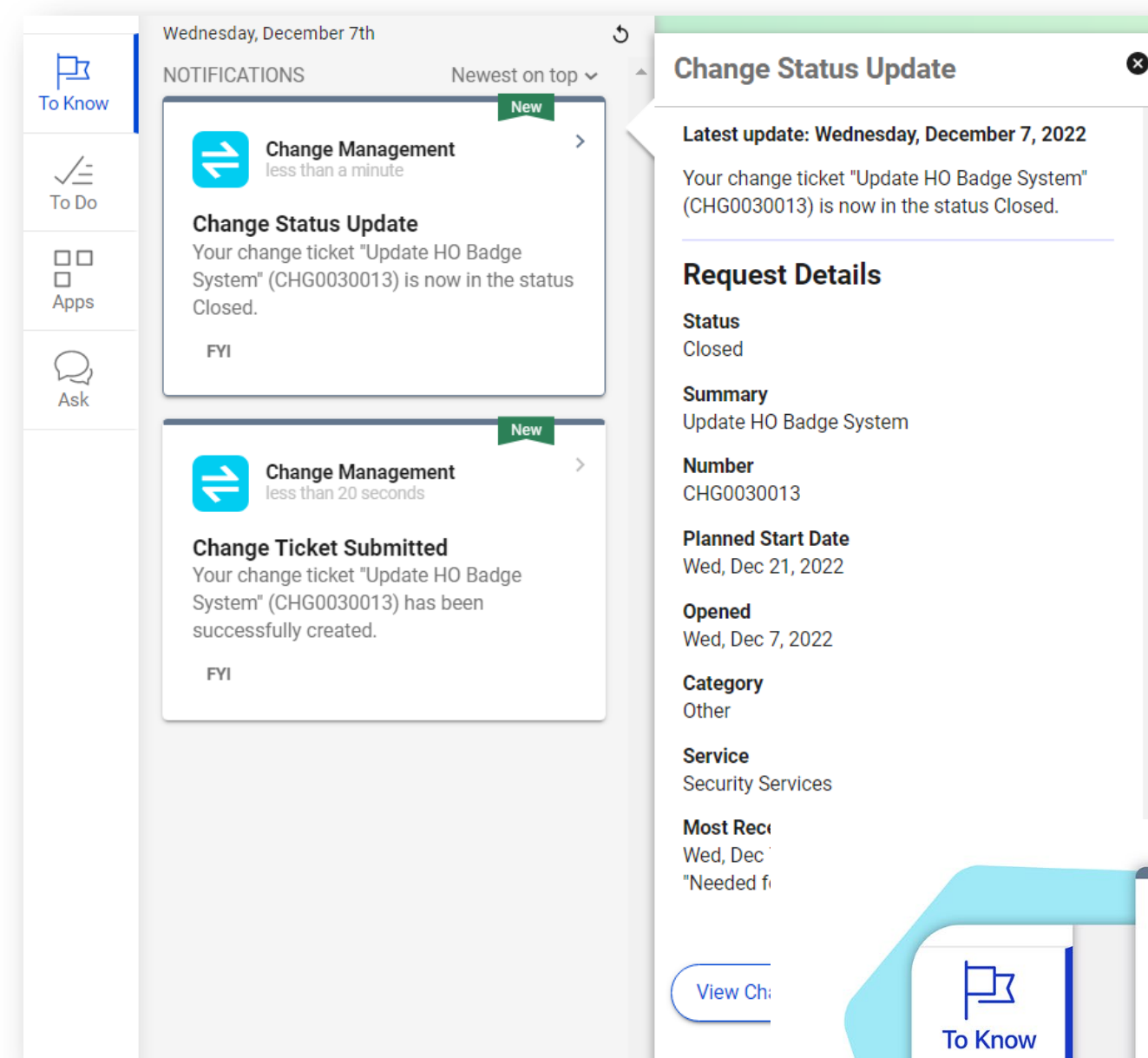
Out-of-the-box apps available for
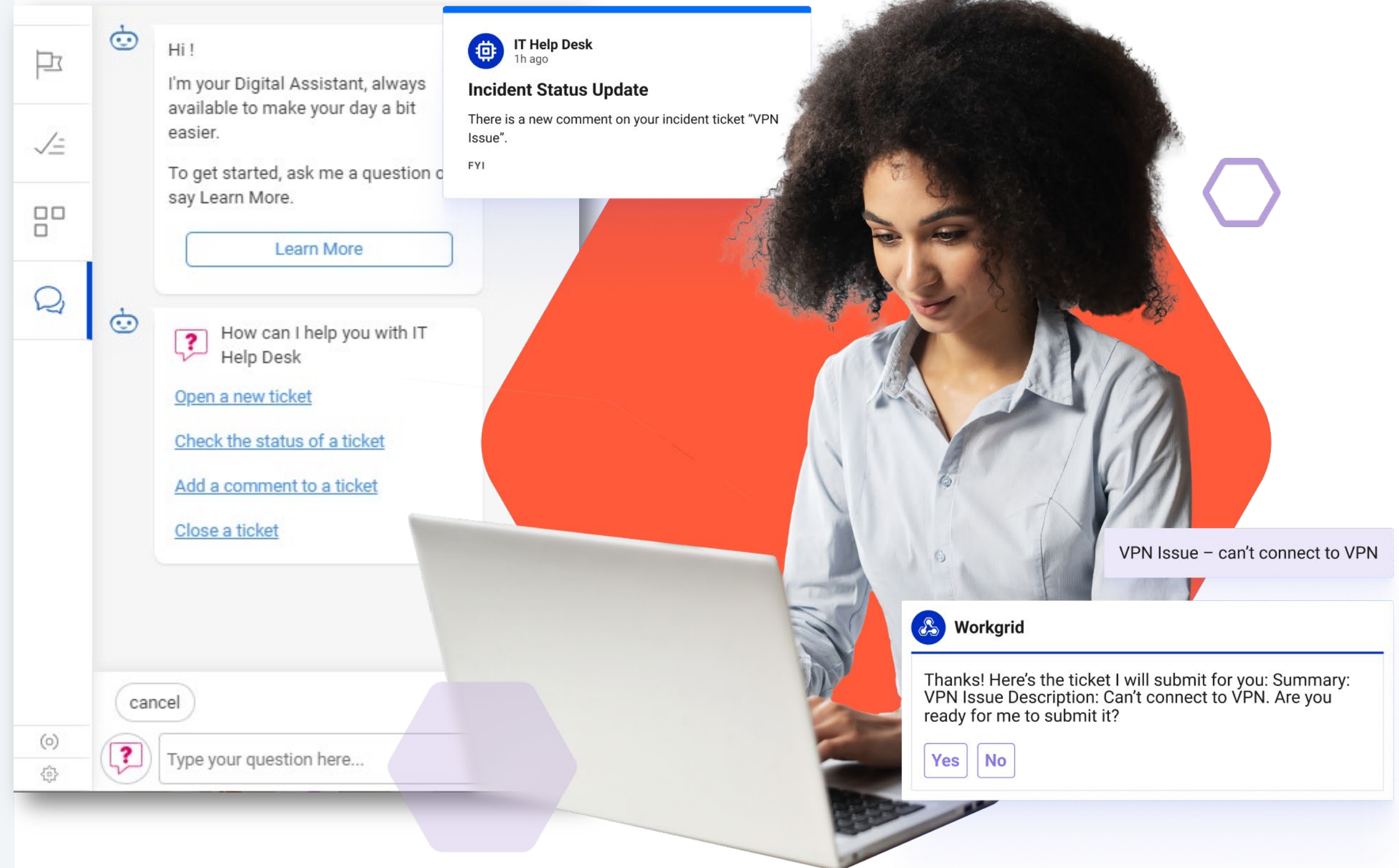
servicenow   ATLASSIAN   zendesk

ITSM Ticketing

Streamline IT Support Case management

Create & update help desk tickets with a chatbot

- Streamline ITSM ticket creation and management by enabling employees to **submit** and **manage** IT help desk tickets using a natural language chatbot.

- Not only can employees submit tickets, but they can also check the status of a ticket, add comments to existing tickets, and close tickets.

Status Updates via Smart Notifications

- Employees will receive updates on their tickets via smart notifications when the status of their ticket has changed.

**Out-of-the-box apps available for**

servicenow   ATLASSIAN   zendesk

Framer App

The Framer app allows admins to surface mobile-responsive public website content via an inline frame (iFrame) microapp.

Quick access to popular information, limitless possibilities

- With Framer, HTML-generated content is presented as a microapp either as a summary card or in a detail pane.

- Popular use cases include social media channels, video-sharing, video-sharing sites, calculators, and more.
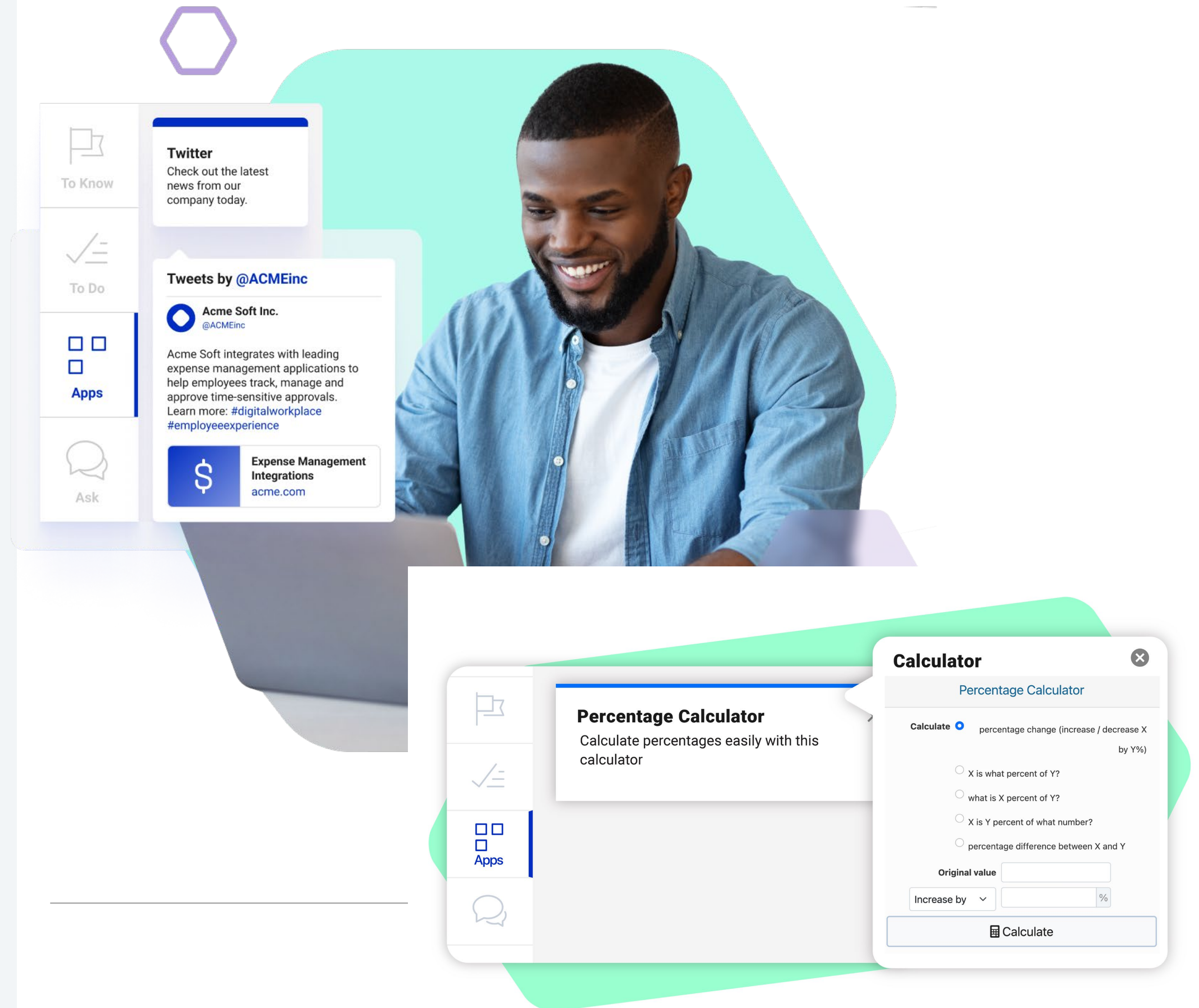
My Day

The My Day app integrates with Office 365 streamline employees' days by putting their daily calendar events at their fingertips.

Calendar Events at a Glance

- The My Day app proactively sends users a smart notification with their Outlook calendar events at the beginning of their day. Users can access their appointments right from the notification cards to start and join meetings.

- The smart notification notifies employees of their Outlook calendar events at the beginning of their day (8am local time).
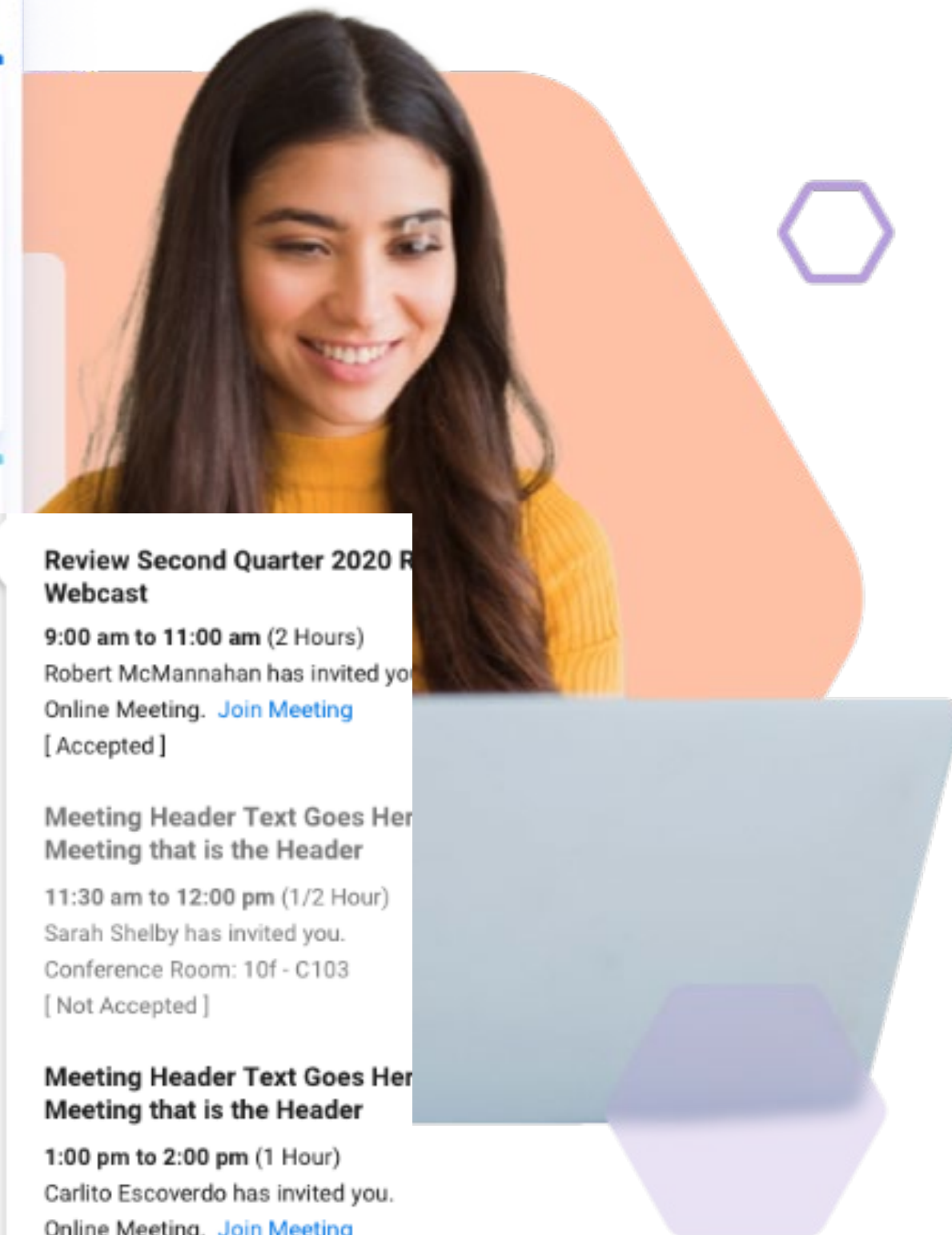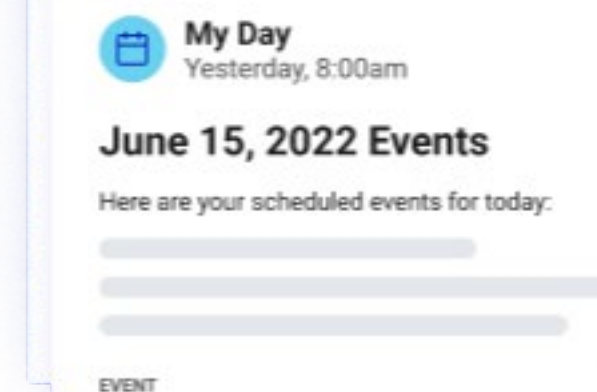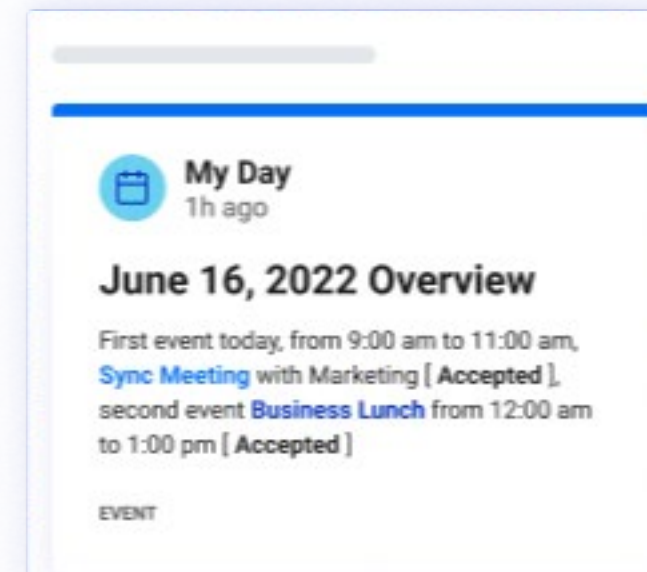
Out-of-the-box apps available for

People Search

Find contact information for your team members, peers, and co-workers.

- Provide employees quick access to an employee directory microapp that enables employees to quickly find contact information and organizational relationships of people within their organizations.

- Employees can also "favorite" their more frequently needed contacts for quicker access.

- The people search app includes contact details of employees and organizational relationships.

Out-of-the-box apps available for

igloo SCIM
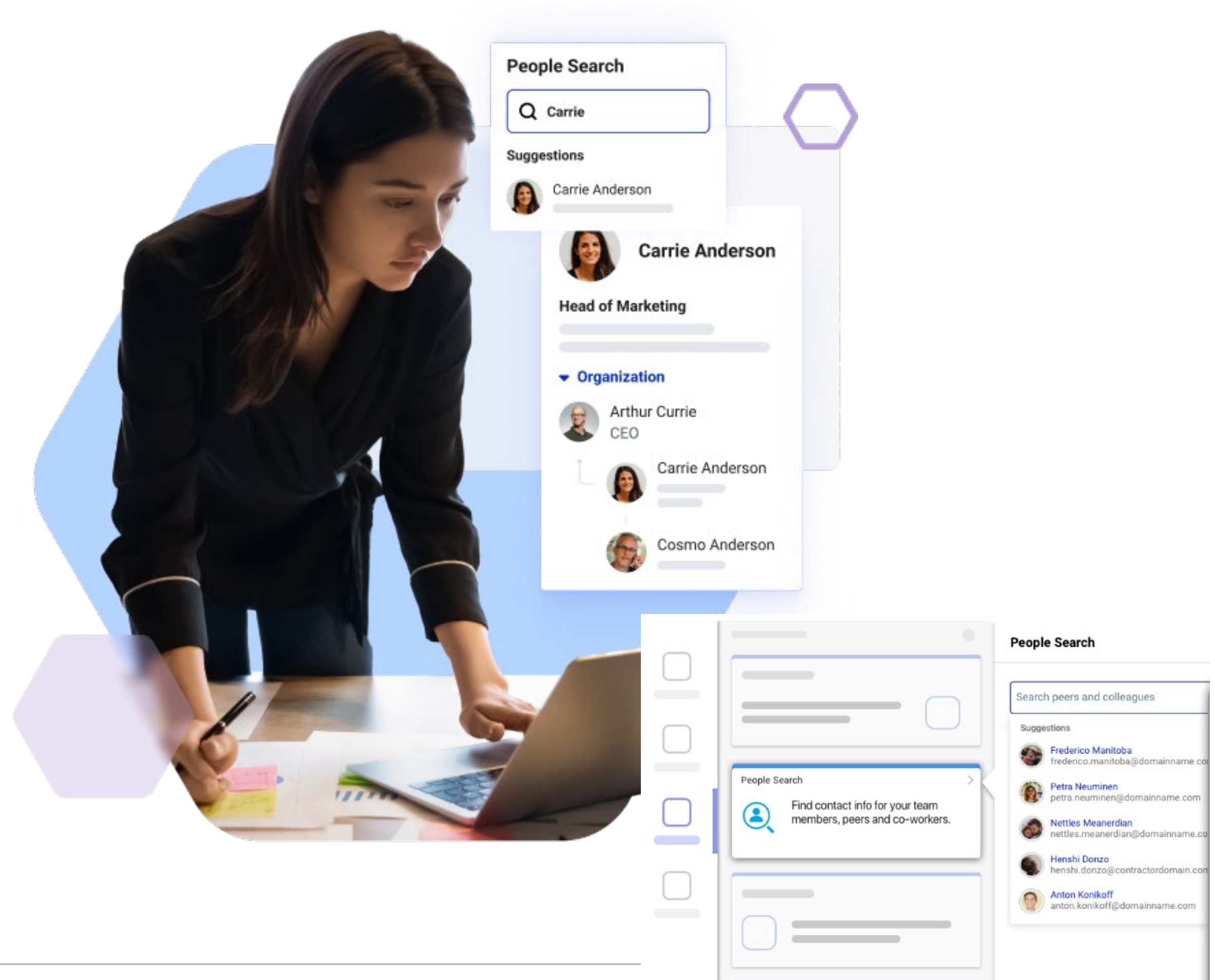
Time Planner

Time Planner App

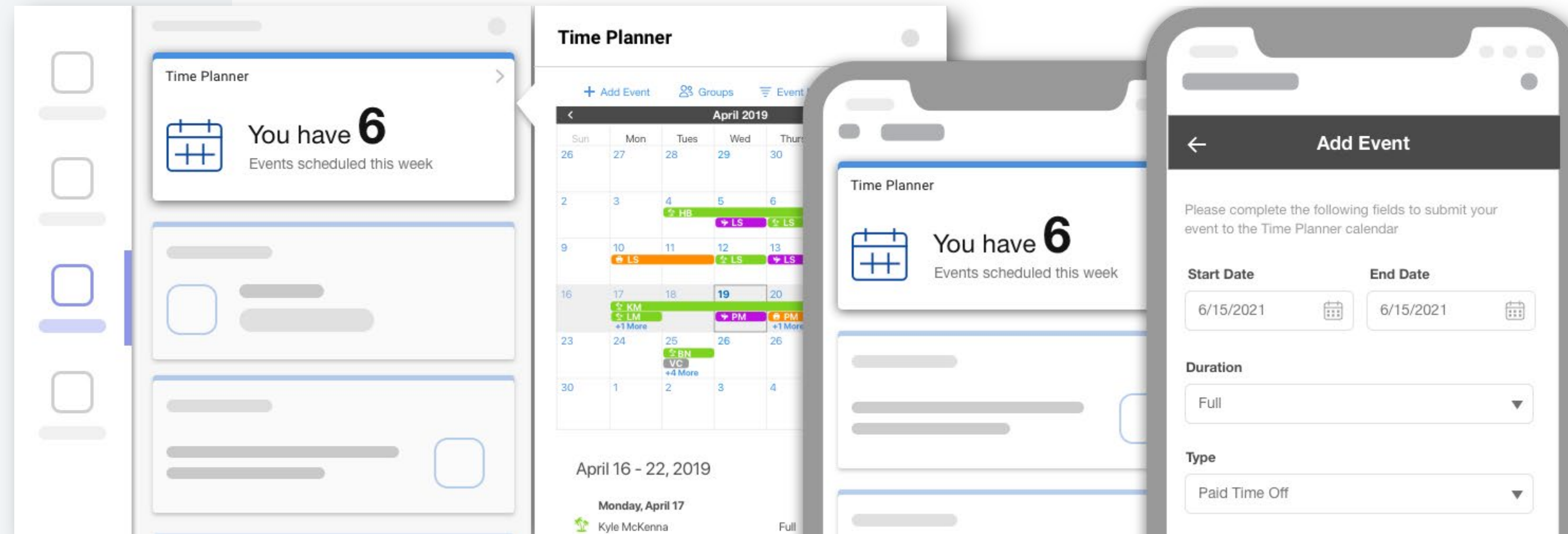- The time planner app is a centralized tool for planning and communicating time away from work- whether your team has paid time off, training events, or travel events, employees can provide visibility for an array of events in a simple and efficient way.

- Custom groups can be created so employees can share visibility with custom groups of employees.
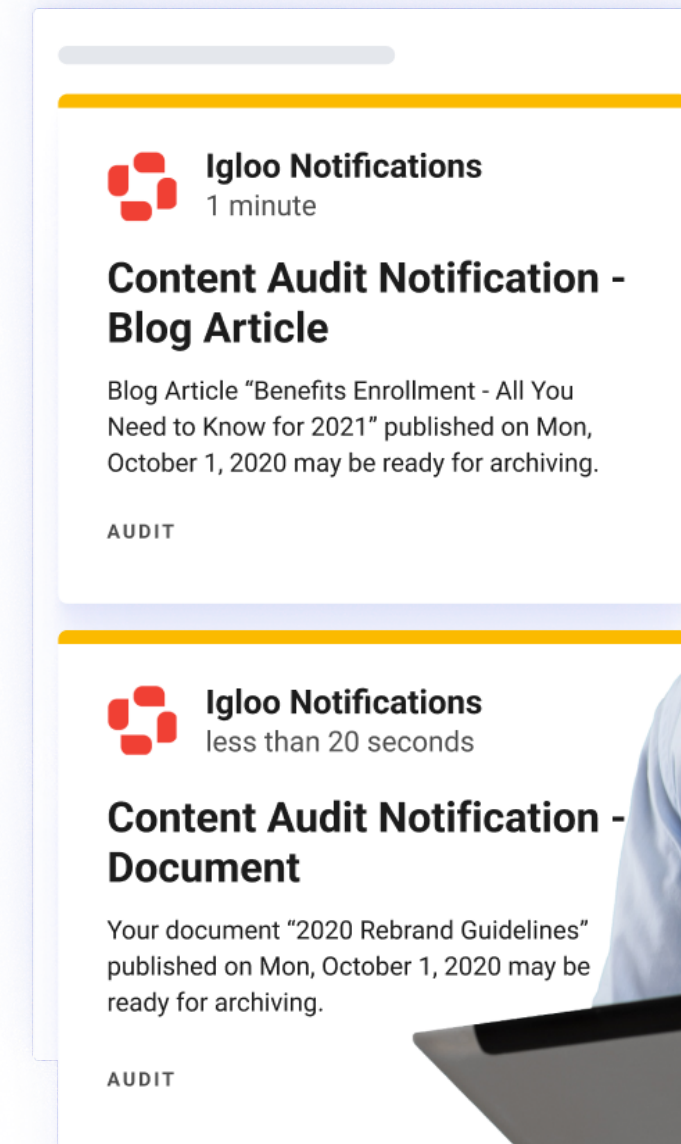
Igloo Content Creator Apps

Apps built to help provide useful insights and notifications for content authors of Igloo.

Stale Content Notifications

- Help prevent stale content across your digital workplace. The stale content app sends a smart notification when content might need to be refreshed or archived.

- Content authors can customize when the notifications are triggered (e.g., content is one year old)

Igloo Notifications
1 minute

Content Audit Notification - Blog Article

Blog Article "Benefits Enrollment - All You Need to Know for 2021" published on Mon, October 1, 2020 may be ready for archiving.

AUDIT

Igloo Notifications
less than 20 seconds

Content Audit Notification - Document

Your document "2020 Rebrand Guidelines" published on Mon, October 1, 2020 may be ready for archiving.

AUDIT

Out-of-the-box apps available for

igloo

Igloo Admin Apps

Apps built to help provide useful tools and notifications for admins of Igloo.
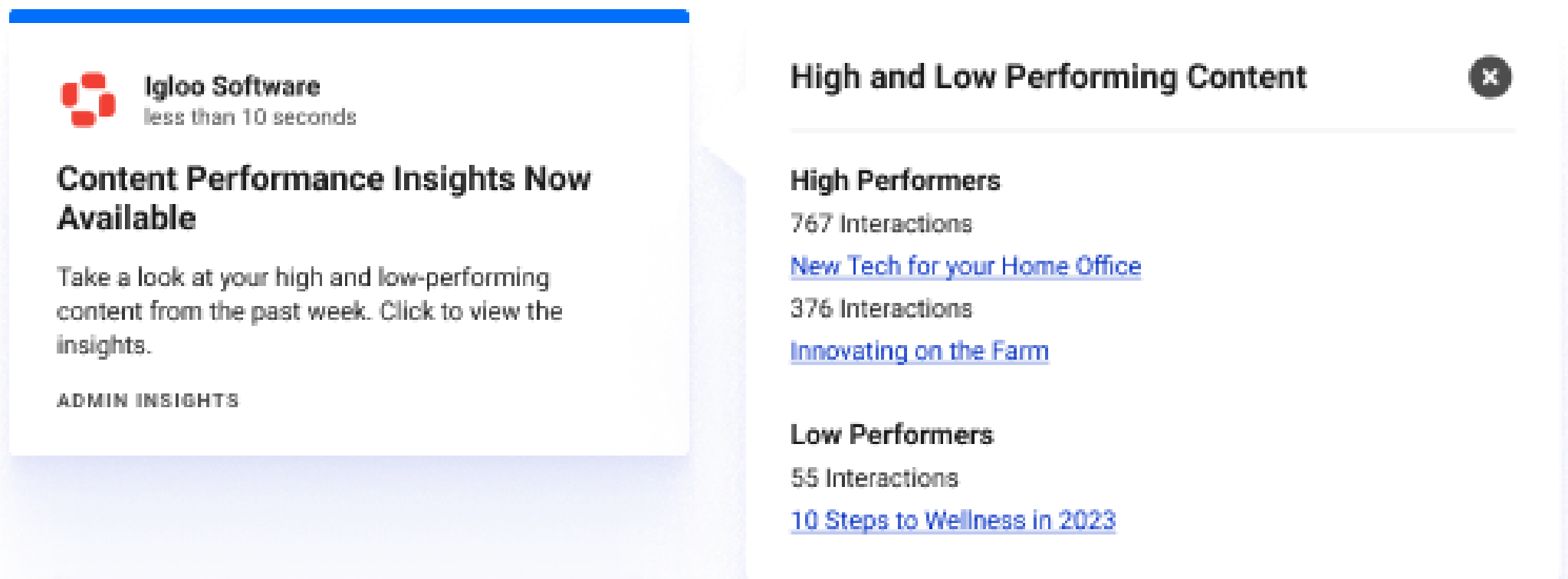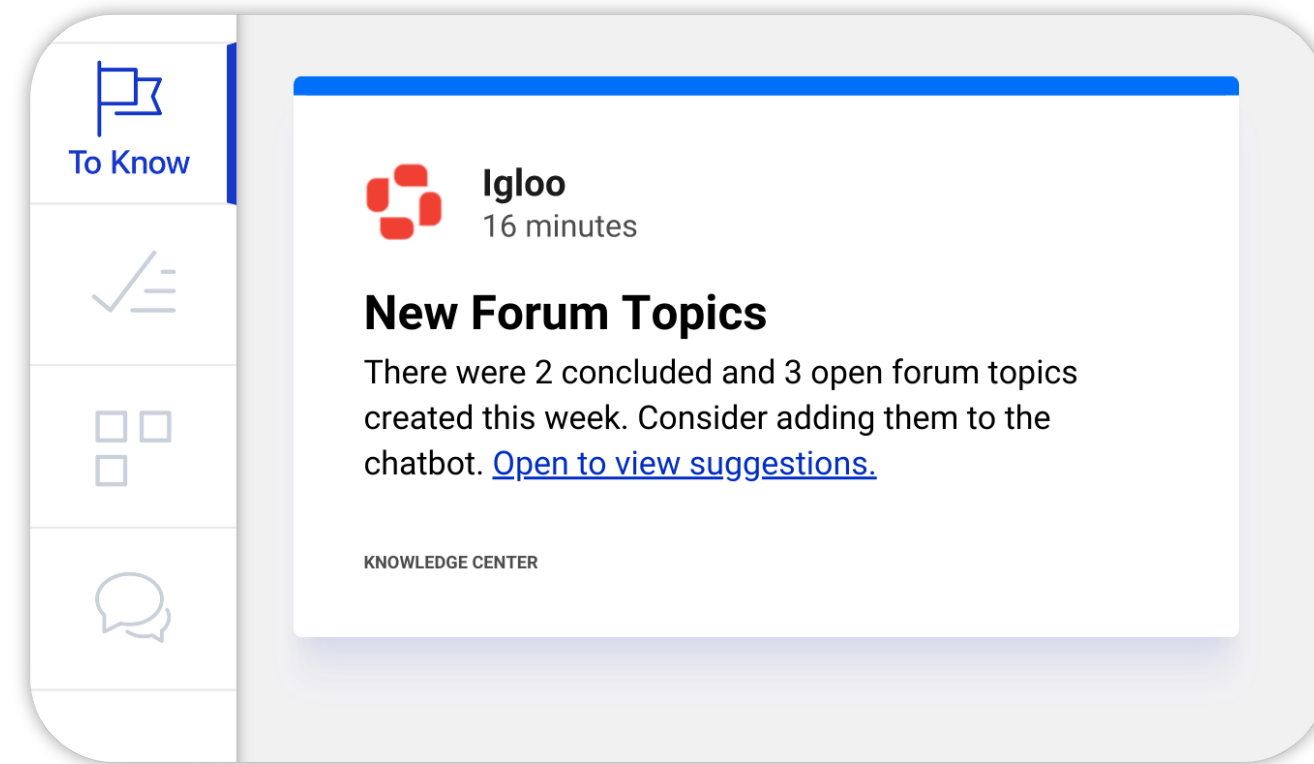
Q&A Trainer

Igloo admins will receive a smart notification (to know) with recommendations for Q&A that can be added to the digital assistant chatbot. The recommendations come from new approved forum answers.

Content Performance

Igloo admins will receive a smart notification (to know) with performance insights for content they published. The smart notification will include a detail panel that list out top performing content and the interaction score (interactions are defined by the number of likes and comments)

Orphaned Content

Igloo admins will receive a smart notification when content has an author that is an employee who is no longer with the company.

To Know

Igloo
16 minutes

New Forum Topics
There were 2 concluded and 3 open forum topics created this week. Consider adding them to the chatbot. Open to view suggestions.

KNOWLEDGE CENTER

Igloo Software
less than 10 seconds

Content Performance Insights Now Available

Take a look at your high and low-performing content from the past week. Click to view the insights.

ADMIN INSIGHTS

High and Low Performing Content

High Performers

767 Interactions
New Tech for your Home Office

376 Interactions
Innovating on the Farm

Low Performers

55 Interactions
10 Steps to Wellness in 2023

Out-of-the-box apps available for

igloo

Igloo Amplifier Apps

Apps built to help amplify the intranet experience for employees

Company events

- Alert employees of a new company event

Birthday notifications

- Send birthday greetings to an employee

Blog recommendations *(Coming Soon)*

- Notify employees of new blog articles based on labels

Reading recommendations *(Coming Soon)*

- Recommend new wikis and blogs based on topics and authors you've previously read.
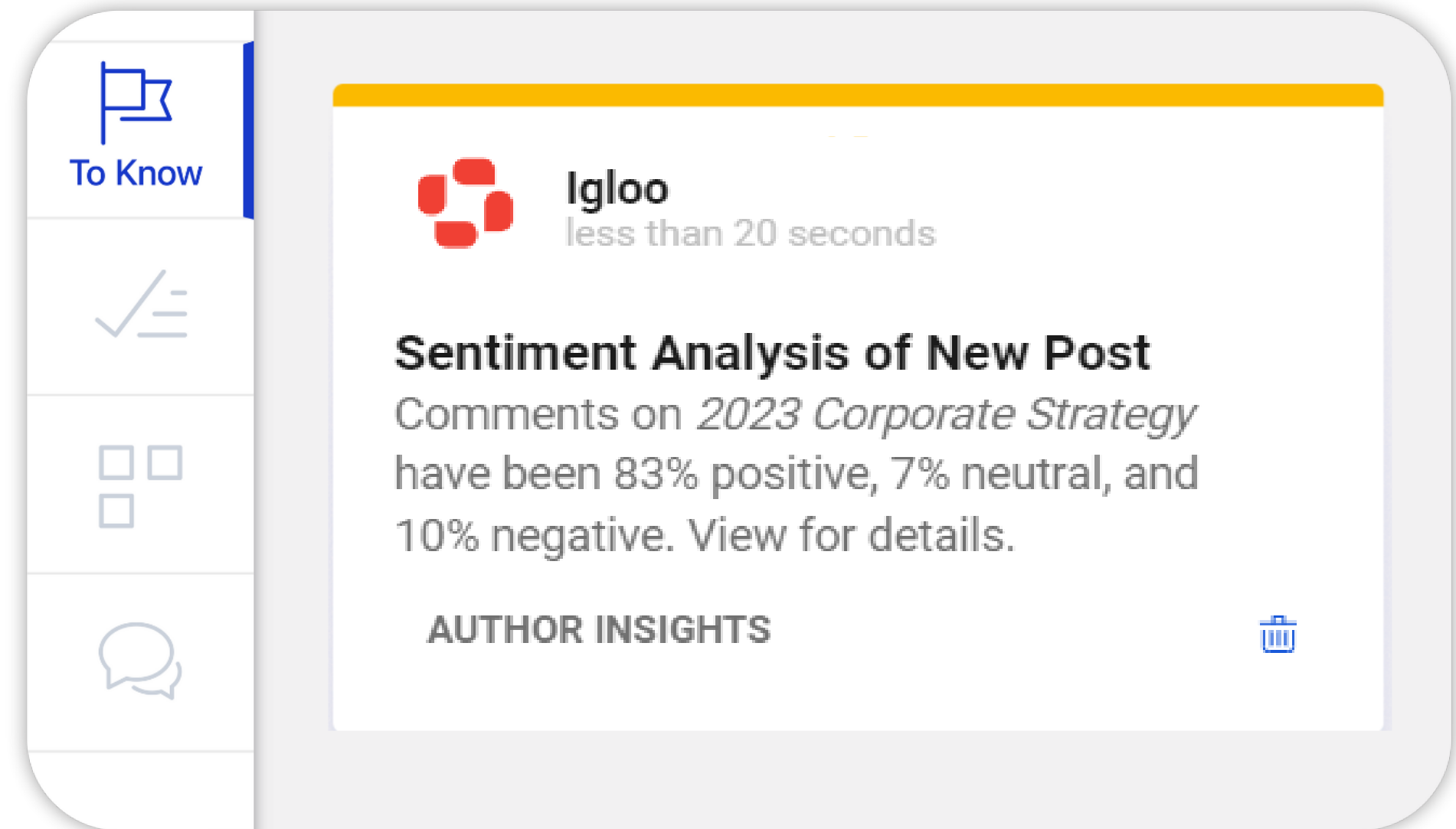

Out-of-the-box apps available for

igloo

Igloo Sentiment Insight Apps

Apps built to provide sentiment analysis of Igloo content

Sentiment Insights *(Coming Soon)*

- Provides sentiment analysis of new post

To Know

Igloo
less than 20 seconds

Sentiment Analysis of New Post
Comments on *2023 Corporate Strategy* have been 83% positive, 7% neutral, and 10% negative. View for details.

AUTHOR INSIGHTS

Out-of-the-box apps available for

igloo

Chatbot Q&A

Make information easy to find and improve knowledge management with personalized answers based on employee attributes from location to job function and more.

A natural language chatbot to help employees throughout their day for a various use cases

- From documents and policies to commonly asked questions, the chatbot is easily programmed to answer common questions across the enterprise.

- The chatbot includes a library of pre-built FAQ and a management interface that makes adding new questions and answers for your chatbot easy.

- Questions and answers can also be uploaded and updated in bulk using CSV files.

One-time & Recurring Communications

One-time communications

Create a one-time notification for employees. Curate your message and then simply choose the send date, time, and audience. From organizational announcements and office closures to benefit reminders or culture-driven notifications, the possibilities are endless!

Recurring communications

Send communications to your employees on a recurring basis. From weekly or monthly status updates to employee surveys, and performance review check-in reminders, customize your notifications and choose the cadence you want to send the notification.

Susan Smith
1h ago

Benefits Reminder

Act now to make changes and customize your benefits plan

SURVEY

Sarah Martinez
1h ago

Holiday Party

This year's holiday party is happening next Friday. Get ready for ugly sweaters, hot cocoa, music and fun!

ANNOUNCEMENT

Facilities Management
1h ago

Atlanta office closed

Due to severe weather conditions, the Atlanta office will be closed today.

IMPORTANT

Wellness at Work
1h ago

Wellness Weekly: count your steps!

Our steps challenge is back!
Get moving and grooving to win prizes! Details here.

RECOMMENDATION

David Wichmann
1h ago

Announcing our new strategic plan.

I am thrilled to announce that our 2022 strategic plan is now ready for release. View the page.

ANNOUNCEMENT

Notification
1h ago

COVID-19 Updates

Stay current with our latest COVID-19 guidelines by reviewing the resource page here.

CDC

ANNOUNCEMENT

Steven Badgley
1h ago

Understanding race and ethnicity at the workplace.

We all play an important role in creating a more inclusive workplace.

LEARNING

Culture Club
1h ago

Volunteer Opportunity

Join the Navit Helping Hands info session to learn more about volunteering virtually or in person with local high schools.

SOCIAL

Time Off Recommendations

Apps built to remind employees to use time off and block their calendar for focus time.

Time Off Reminders *(Coming Soon)*

- Remind employee to take time off when it's been two months since last Out of the Office day

Protect your Time *(Coming Soon)*

- Help employees save time in their calendar for focused time and work. Out of the box, it sends a notification when employees have more than 20 hours of their Outlook calendar time booked with meetings. You can customize the template to change the threshold; all app features can be modified for your preferences.

To Know

New

Office 365
less than a minute

Remember to schedule focus time
You have over 20 hours of meetings scheduled this week. Remember to block some quiet or focus time. Go to your calendar now to block some time.

TIME MANAGEMENT

Office 365
less than 10 seconds

It might be time for a day off

It's important to take time to recharge and use your time off benefits. You Haven't taken a day off in about two months!

Check your balance and schedule a day off now!

TIME OFF

Out-of-the-box apps available for

igloo

Café Menu

The Café Menu app answers the most common question on everyone's mind... "What's for lunch?"

Café Menu

The Café Menu app surfaces values from a Microsoft Excel template to send a smart notification to employees daily with the lunch menu.

To Know

Café Menu

What's for lunch today tomorrow?

In addition to everyday snacks and options, the Café is open for the following rotating specials.

CAFÉ

What's for lunch?

Specials for Tuesday, January 24th

Pizza Oven: Meat Lovers
Sandwich Central: Roast Beef
Grill: Steak Tips

Tomorrow's Menu
Pizza Oven: Veggie
Sandwich Central: Pita Pocket
Grill: Fajitas and Fries

Integrates with

Microsoft
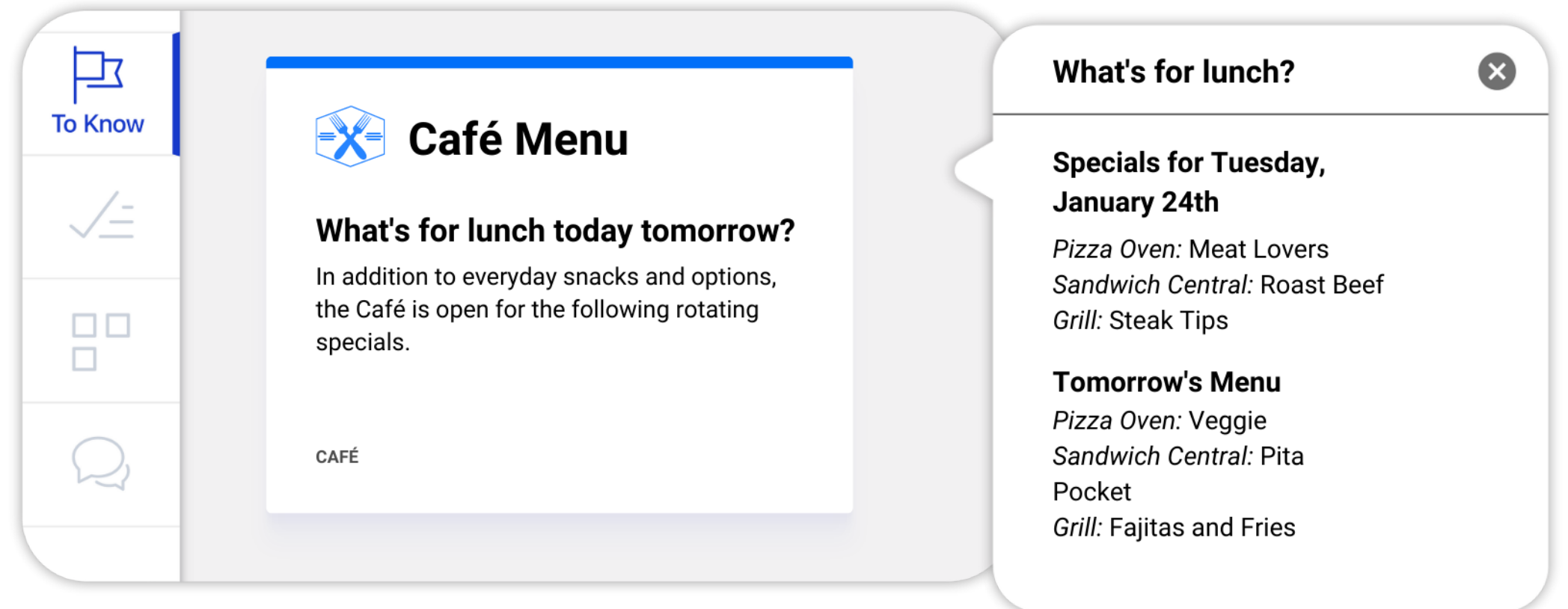
Weekly Report

Share custom content via the Weekly Report app. Share data such as sales metrics to product inventory reports, and lots of other use cases!

Weekly Report

The Weekly Report app makes it easier to share critical Excel-based report information with decision-makers and other stakeholders who want to be in the know.

Out of the box, the app uses values from an excel spreadsheet to send out a smart notification with highlights from the report at 2pm each Friday.

The app can be customized to feature different layouts, and headings or changes to the frequency.

	D	E	F	G	H	I	J	K	L
nue	Widget profit	Notes							
0.00	$ 60,137.00	We had a wonderful week of widget sales!							
0.00	$ 50,479.00	A little dip in sales after the first week of the year rush. Don't worry, we will bounce back							
0.00	$ 76,813.00	Our best week this year!							

Widgets

Our weekly widget report

This week's financial report results for the latest on widget production.

This week's report
Our best week this year!

Widgets sold	6983
Widget Revenue	$209, 490.00
Widget profit	$76,813.00

Integrates with

Microsoft

Build your own apps!

Leveraging Workgrid's platform, customers have access to over 100 pre-built connectors (integrations to enterprise systems) that apps can be built against. Our no-code app builder takes the complexity out of building new apps with a drag-and-drop editor that dramatically reduces the time to deliver new experiences from weeks to hours!

Integrations Available

- Act! 365
- Act! Premium
- ADP Workforce Now
- Autotask CRM
- Autotask Helpdesk
- Bamboo HR
- Box v2
- BrightTalk
- Campaign Monitor
- Dayforce HCM
- Expensify
- First Advantage
- Fortnox
- Freshdesk V2
- Freshservice
- GlobalMeet Webinar
- Greenhouse
- HireRight
- HubSpot CRM
- HubSpot Marketing
- iContact
- Infobip
- Insightly
- Jira OnPrem

- Jira
- Lithium Response
- MailJet Marketing
- Mailjet
- Microsoft Dynamics 365 HR
- Microsoft Dynamics GP
- Microsoft Dynamics Navision
- Microsoft Office 365
- Netsuite CRM
- Netsuite ERP
- Netsuite Finance
- Netsuite HC
- Netsuite Restlets
- Oracle HCM
- Oracle Sales Cloud
- Orderful
- Pardot by Salesforce
- Pipedrive
- QuickBooks Enterprise
- Rally (Formerly CA Agile Central)
- Recurly
- Sage 50 US
- Sage CRM
- Sage Interact V3

- Salesforce Marketing Cloud
- Salesforce Service Cloud
- SAP Ariba
- SAP Business One
- SAP Hybris Cloud for CRM
- SAP Hybris Cloud for Helpdesk
- SAP R/3 BAPI
- SAP S/4 BAPI
- SAP S/4 HANA Cloud
- SendGrid
- ServiceNow
- SuccessFactors
- Sugar CRM
- Sugar Enterprise
- Sugar Market
- Sugar Sell
- Sugar Serve
- Taleo Business Edition
- Twilio SMS
- Twilio
- Ultimate Ultipro
- Zendesk