

Workflows contain 2 types of information, the workflow itself and the metadata associated with that workflow. We can use Workflow Designer to modify a Workflow and change the meta data in the same way we did for documents.

1 Use Designer to open a Workflow

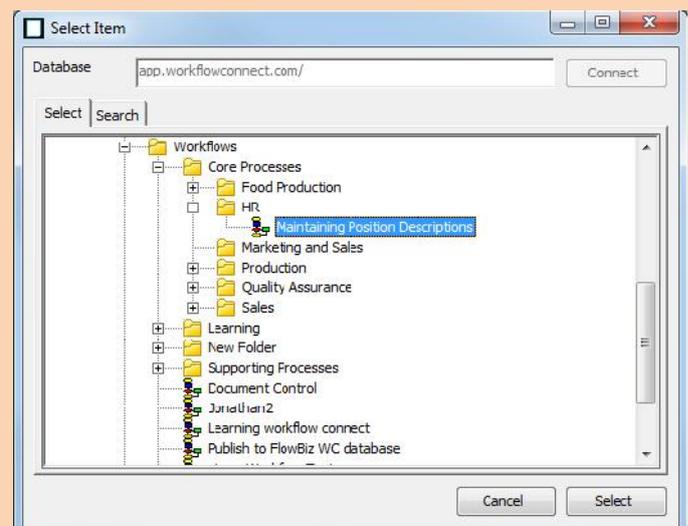
Workflow Designer is able to save and open workflows both from your local system and also from Workflow Connect.

1. To open a Workflow Connect workflow, in Workflow Designer go to the *File Menu* and choose *Open from database*.
2. Enter the correct information to login
 - **Server:** app.workflowconnect.com
 - **Login name:** your workflow connect username
 - **Password:** your workflow connect password
3. Click *OK* to login.
4. Browse the folders to find the workflow that you are want to edit.

Note: If Workflow Designer is already connected to Workflow Connect then you won't be prompted with the login screen and it will connect automatically.

Tip: Workflows can be uploaded to any folder. But you can quickly browse for Workflows by looking in the Workflows folder which shows shortcuts to the all workflows in other folders..

Tip: If you know the name of a workflow but not the folder you can use *Search* to quickly find it.

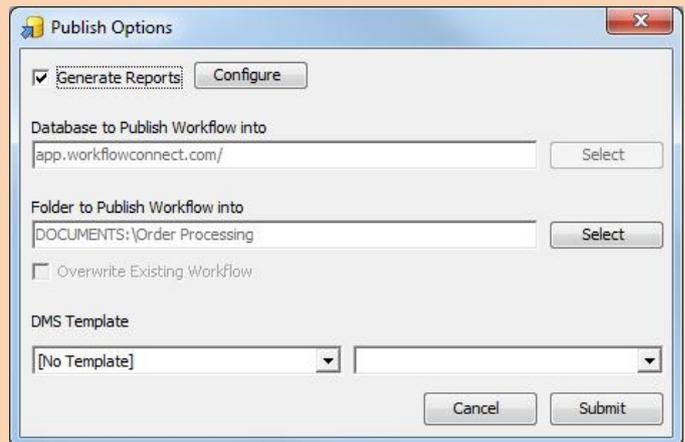


2 Make changes and upload

Once the workflow is open in Workflow Designer you can edit it like you would any other workflow and even save it to your local system.

1. When you want to republish go to the *File* menu and choose *Publish*.
2. The options are the same for publishing a Workflow for the first time except that the *Overwrite Existing Workflow* is greyed out so that it will automatically overwrite the existing workflow within Workflow Connect.

Note: Certain actions, such as saving the workflow to your computer, closing the workflow then reopening it might require that you manually choose *Overwrite Existing Workflow* when you upload.



3 Change meta data details for a workflow

Workflow Connect treats workflows as both workflows and as documents, so a workflow will also have all the same document meta data that documents will have.

1. To view the workflow meta data from the *Document Library* click on the workflow name (not the workflow icon or document icon).
2. This displays the Document Details for the workflow, including name, description, keywords and so on.
3. To change this click on the edit icon  and then click on the *Check Out* button when it comes up.
4. When you are finished with your changes *Check in* the document.

