

## Prior Learning

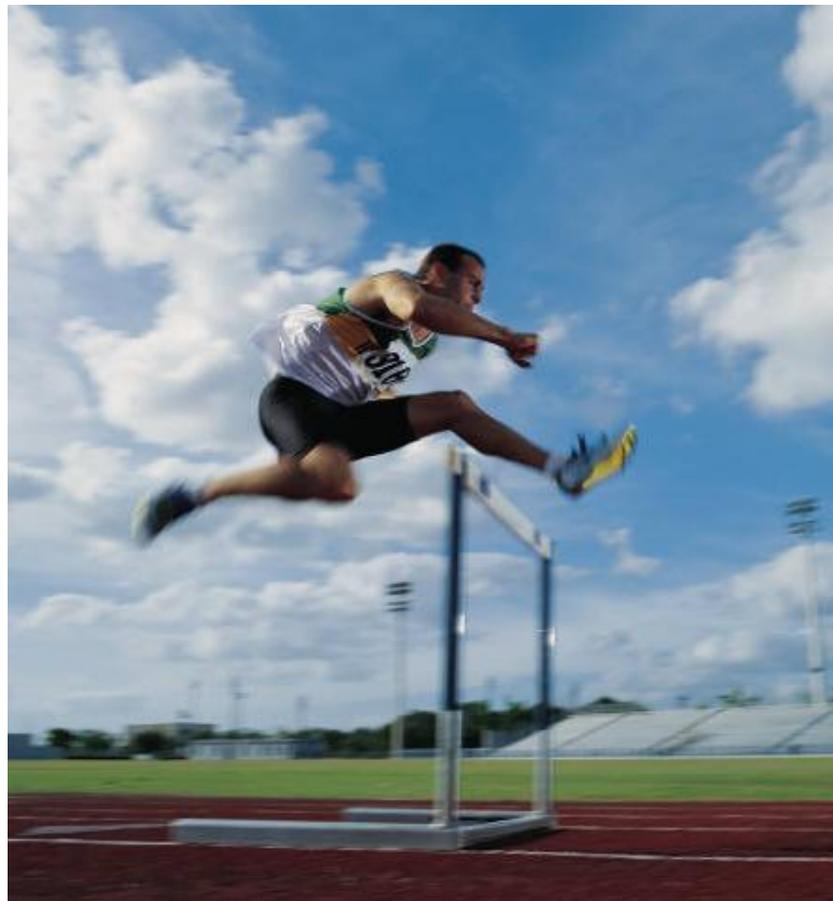
It is helpful but not essential for the learner to have the following knowledge

1. A basic understanding of workflows or process maps.
2. Used Workflow Designer as a standalone program.
3. Used Workflow Connect for document management without using workflow diagrams.

## Learning Outcomes

1. Understand the relationship between Workflow Designer and Workflow Connect.
2. Understand the value of using workflows diagrams (process maps).
3. Be able to create a workflow diagram in Workflow Designer.
4. Be able to upload documents into Workflow Connect.
5. Be able to create jumps between workflow diagrams that are in Workflow Connect.
6. Be able to upload workflow diagrams from Workflow Designer to Workflow Connect.
7. Be able to use workflows that have been uploaded in Workflow Connect.

# Create Workflow Jumps in Workflow Connect



## Introduction

Workflow Connect acts as a fully featured document management system. But what sets it apart from other systems is the ability to use workflows to organize processes and documents into a single linked repository that is controlled and managed.

This tutorial will take you through an example for:

- Setting up a workflow
- Uploading the workflow into workflow connect
- Linking, or Jumping between workflows within workflow connect.

## Document Details

- Workflow Designer 4.20
- Workflow Connect 4.1
- Revision 1.0

## Example: Processing Telephone Orders

In this example we will look at a simple workflow for processing a telephone order. This example features the following

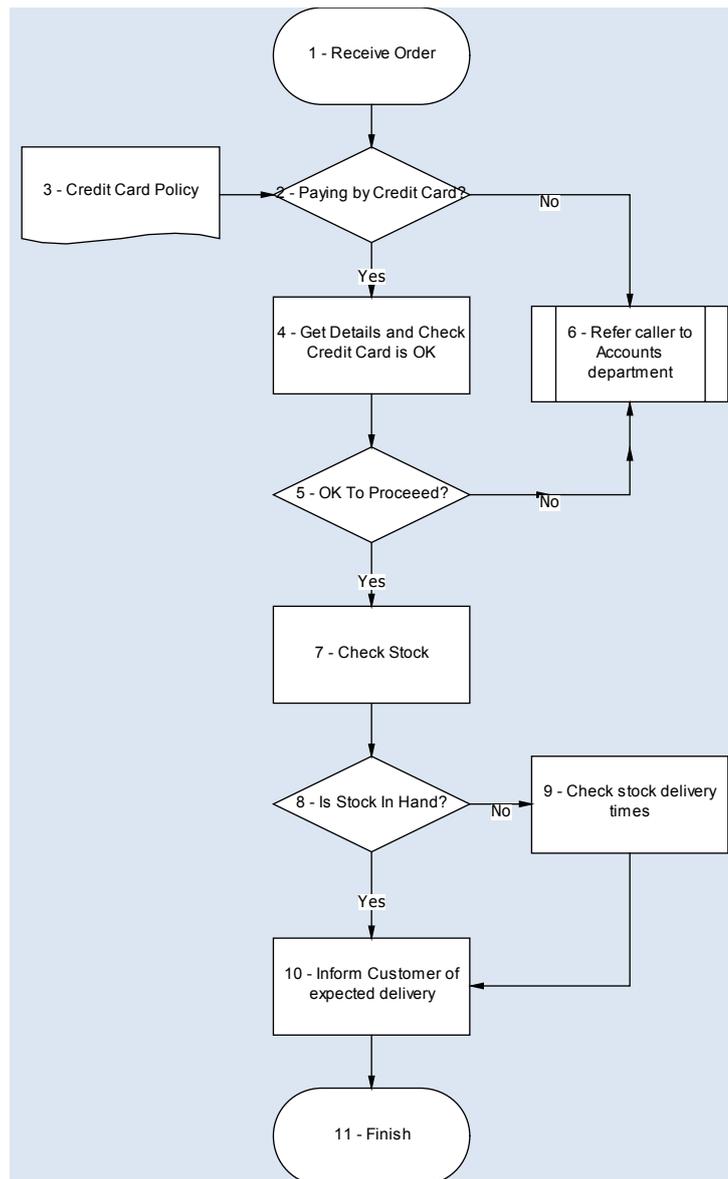
- Process Step
- Decision steps
- Document steps
- Jumps to other workflows.

### Step1: Create a Workflow with Workflow Designer

Our first step is to setup the workflow or process map in Workflow Designer. If you don't already have a copy of Workflow Designer you can download for free from <http://www.workflowconnect.com/download>

**Note:** In this example we are only creating workflows. It is also possible to add a lot of additional information into workflows, including linking to workflow steps to documents.

If you haven't used Workflow Designer before you may want to start with the getting started guide in the Workflow Designer help. However the help below is enough for the beginner user.



### Create a new Workflow Diagram

1. From the *Welcome* screen click on the *Create a Workflow* option.
2. This will bring up the *Select Template* dialog box.
3. Choose the *Standard* template and click *Select*.
4. This will create a new workflow with a single *Terminate* shape for the beginning of your workflow.
5. Enter a title for the workflow in the *Title of Workflow* field of the Information Pane. For our example the title will be "Telephone Order Processing".

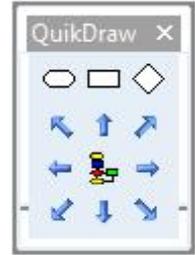
### Add details to the first step

1. Click on the first step in the workflow diagram.
2. This will bring up the *Step Details* panel in the Information Pane on the right side of the screen.
3. Type "Receive Order" in the *Label* field.
4. You will see what you type into the *Label* field also appear in the diagram figure.

## Add a decision step

In our diagram the next step after the *Receive Order* is a decision as represented by a diamond shape.

1. If the first step – *Receive Order* – is not selected click on it to select it.
2. This will bring up the *QuikDraw* toolbar.
3. Click on the diamond *Decision* shape.
4. Then click on the down arrow to place the decision step below the first step.
5. Type “Paying by Credit Card?” in the step *Label*, in the Information Pane.



## Add a process step

We want to add a process steps to the right and below the decision step.

1. Click on the decision step diamond *Paying by Credit Card?* if it is not already selected.
2. In the *QuikDraw* toolbar click on rectangular *Process* shape and click on the down arrow.
3. This will put a new process step before the decision diamond.
4. Type “Get details and check that credit card is OK” in the step label.

## Add a second process step

Decisions should have at least 2 options from them. So we want to add a second process step to the right of the decision diamond.

1. Click on the decision step *Paying by Credit Card?* if it is not already selected.
2. In the *QuikDraw* toolbar make sure that the rectangular *Process* shape is selected and click on the right arrow.
3. This will put a new process step to the right of the decision diamond.
4. Type in “Refer caller to Accounts department”.
5. We won’t make it jump yet so it will look like an ordinary process step for now. When we change it to a jump the shape will also change to jump shape, automatically adding two vertical lines into the shape.

## Complete the diagram

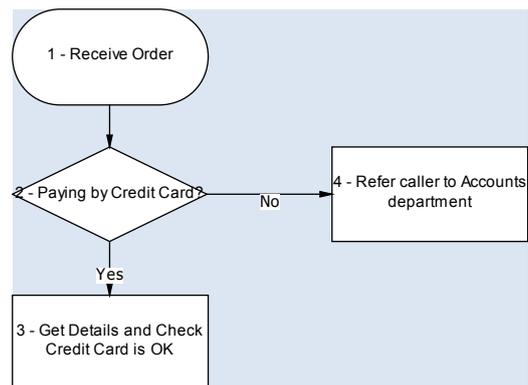
We have enough of the diagram completed to be able to complete this tutorial. If you want, add in the rest of the steps to complete the diagram.

**Note:** Don’t add the jump yet. We will have to create a second workflow and upload it to Workflow Connect before we can do that.

## Save the workflow

Save the workflow by

1. Go to the *File* menu and choose *Save*.
2. If this is the first time that you are saving this workflow it will bring up the *Save as* dialog box. The suggested filename is the save as the workflow title that we entered previously.
3. We can change the file name if we wish.
4. Click on the *Save* button to save the file.



## Step2: Create a second workflow

Our business could be represented by a single large workflow. To make creating and managing workflows for an organisation easier Workflow Designer lets you link multiple workflows together using jumps. Once workflows are linked they are sometimes called end-to-end processes, and become an important navigation aid for understanding how workflows interact.

We can use jumps to:

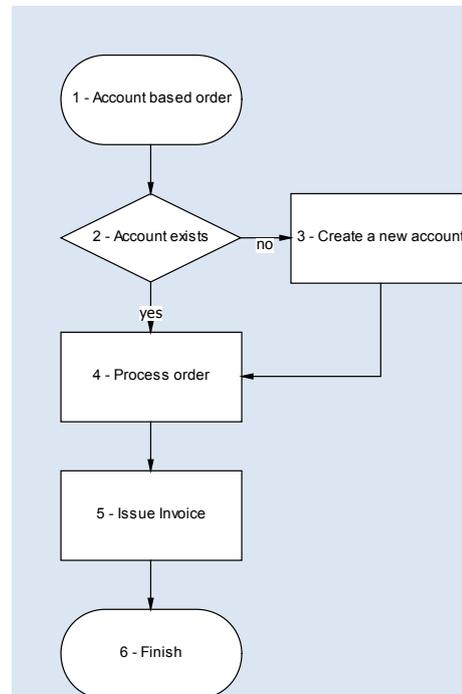
- Transfer work over to another department or organisation.
- Provide details on how to complete a step so that high level diagrams can keep fairly simple.
- Allow individual people, groups or departments to create and work on their own workflows, but combine them together into what is essentially a single large workflow.

In our case we have a workflow for processing a credit card order. When the customer wishes to order in another way or their credit card is not valid then the order needs to be handled through the accounts department. We could of course include these details in a single flow chart, but we avoid doing so for two reasons.

1. The accounts department is responsible for their own procedures and processes, so they would create and manage their own workflow diagrams.
2. Staff processing ordinary telephone orders don't need to know about how things are done in the accounts department, only that when to pass an order over to the accounts department.

Create a new workflow diagram.

- Click on the *Welcome* tab in the top left of the Workflow Designer screen.
- Click on *Create a Workflow*.
- Create a simple workflow like the one on the left. We have kept it fairly simple so far. Remember we could expand the complexity of the chart by simply creating a jump for the step *Process Order* and also making *Finish* a jump to another workflow.



## Step3: Create folder in Workflow Connect

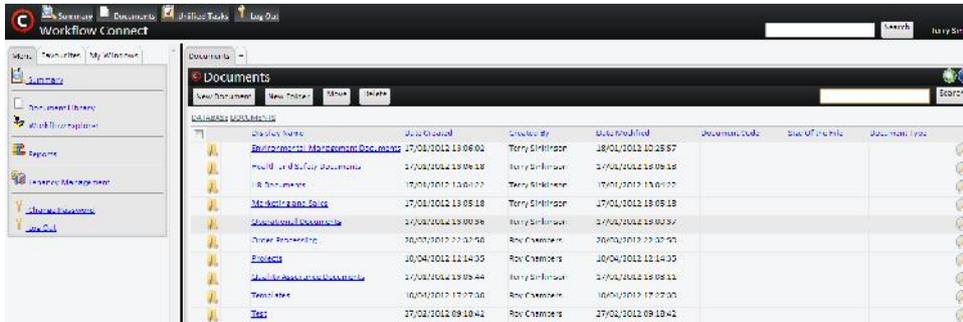
Workflow Designer can operate as a standalone tool on your local computer or network. To manage documents with a fully featured document management tool you can use Workflow Connect to upload, share and manage your documents and workflows.

**Hint:** If you are creating and modifying workflows, you can use those workflows within Workflow Designer without uploading them to Workflow Connect. Your workflows will remain linked to the online documents and jumps. When you want to publish a new or changed workflow for others to use then you can upload them.

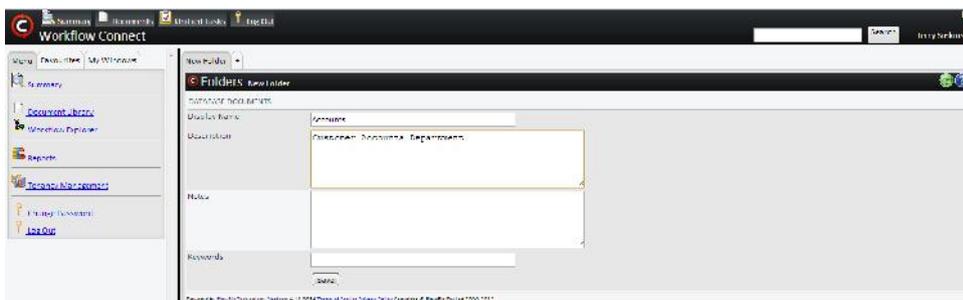
For this example we will create a folder for our workflow called “Accounts”.

## Create Folder

1. Log into Workflow Connect. If you are using a regular account then you will log in using [www.workflowconnect.com](http://www.workflowconnect.com). If this is the first time to use Workflow Connect then you can sign up for a free trial account.
2. Click on the *Document Library* button on the left side of the screen.
3. This will bring up the *Document Library* screen. We will create our folder here at the root level, but we can also create folders within folders.



4. Click on the *New Folder* button.
5. This will bring up the *New Folder* screen.

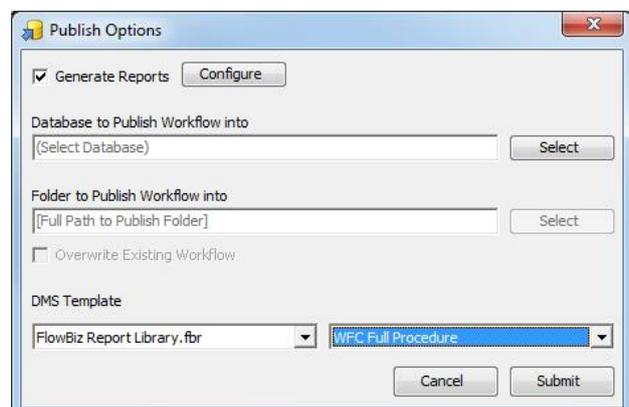


6. Type “Accounts” into the *Display Name* field.
7. You can also fill in additional details into the other fields, however this information is not needed to create a folder.
8. Click on the *Save* button.
9. This will return to you the *Document Library* screen. You should see the *Accounts* folder listed.

## Step 4: Load the workflow to workflow connect

To put the workflow online we need to publish it to a Workflow Connect database.

1. From the *File* menu choose *Publish*.
2. This opens up the *Publish Options* dialog box.
3. First we want to choose which database to publish the workflow to by clicking on the *Select* button in this section. **Note:** if the *Select* button is greyed out and a web address already appears in the database field, then you are already logged in.

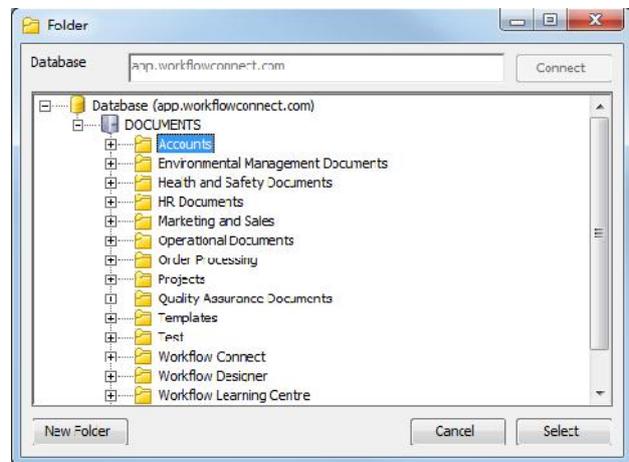


4. This will bring up the *Workflow Connect Webservice Logon*.
5. For general Workflow Connect users the *Server* will always be `app.workflowconnect.com`. **Note:** This will be same as the logon you used when you connected the workflow to online documents.
6. Type in your Workflow Connect *Login Name* and *Password*.



7. Click on *OK* to login and return to the *Publish Options* dialog box. The dialog box will now display the selected server.
8. Now we want to choose the location to display the workflow. Where it says *Folder to Publish Workflow into* click on the *Select* Button.

9. Click on *OK* to open up the Document Library where you can choose which folder to publish the workflow.
10. Click on the + beside *Database*, and then the + besides *Documents* to see the folder list which will be the same as the folder list that you see in the *Document Library* screen in Workflow Connect.



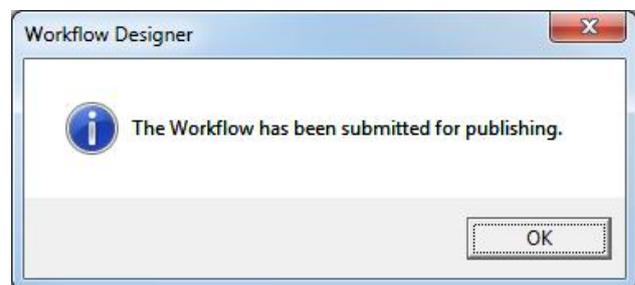
11. We will to publish the workflow to the *Accounts* folder so click on that folder and click on the *Select* button.
12. You will now see the selected folder name displayed in the *Folder to Publish Workflow into* field.

13. If you are replacing an older version of the workflow make sure you have checked the *Overwrite Existing Workflow* checkbox.
14. At the same time you are uploading the workflow chart you can also upload reports to accompany that report. Go to the *Generate Reports* check box to select the reports that you want associated with workflow.

15. You can also include a report that will appear in the Document Management System beside the Workflow using the *DMS Template* drop.

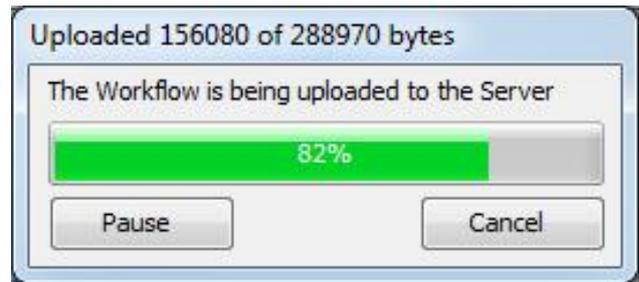
16. Click on the *Submit* button to publish the workflow to Workflow Connect.

17. Workflow Designer will then prepare the workflow for online publishing. This maybe take a few seconds to a few minutes depending on the complexity of the workflow and the options selected. When it is ready to be sent online you will get a dialog box that tells you *The Workflow has been submitted for publishing*.



18. Click on the *OK* to send the document to the online Workflow Connect database.

19. You will then see a progress bar as the workflow uploads.
20. When this dialog box closes your workflow has been uploaded.
21. Should now be able to see the workflow in Workflow Connect.



## Step 5: Link to a workflow in Workflow Connect

Now that we have a workflow in Workflow Connect can create a jump to it from our first workflow.

### Jump to workflows within Workflow Connect

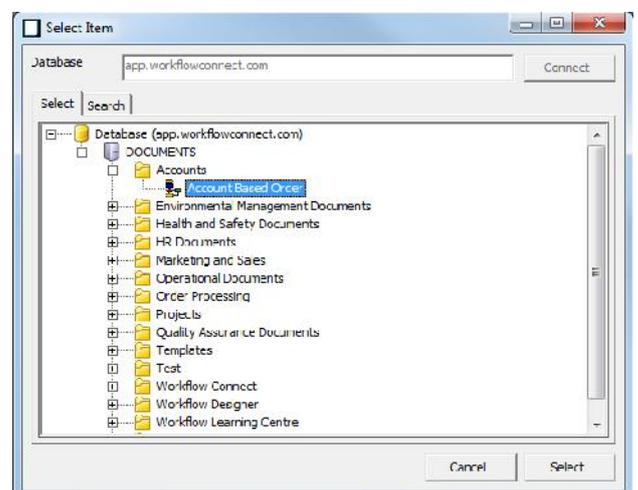
You can link workflow diagrams together using jumps. We will create a jump to a workflow within Workflow Connect.

**Note:** to do this you need a workflow that is already loaded within workflow connect. If you haven't already done steps 3 and 4, create a simple workflow and save it as "Customer Account Processing" then upload it following the instructions in Step 4.

1. Click on the step *Refer caller to Accounts department*.
2. In the Information Pane click on the *Jumps* button down the bottom to open up the *Jumps* pane.
3. We can jump to workflows that are on the local system or within Workflow Connect. To have the jumps work after we upload the workflow we need to create the jump to a workflow that is already uploaded to Workflow Connect.



4. To do this click on the *Database Jump* button.
5. This brings up the *Workflow Connect Webservice Logon*.
6. For general Workflow Connect users the *Server* will always be *app.workflowconnect.com*. **Note:** This will be same as the logon you used when you uploaded the workflow to Workflow Connect.
7. Type in your Workflow Connect *Login Name* and *Password*.
8. Click on *OK* to open up the database.
9. In the *Select Item* dialog box click on the + beside *Database*, and then the + besides *Documents* to see the folder list which will be the same as the folder list that you see in the *Document Library* screen in Workflow Connect.
10. Browse through the folders to find the workflow that you want to jump to and click on it.
11. The click on *Select*.
12. The step's shape will change to the jump shape to indicate that this is now a jump and when you upload the workflow to Workflow Connect the jump will continue to work.



## Step6: Upload the main workflow

Our original workflow has been linked to the second one online, but it is still only available on the local computer system. To share it online we will need to also upload it to Workflow Connect.

1. In workflow Connect create a folder named “Order Processing”
2. Upload the workflow to this folder in the same way we uploaded the other workflow in step 4.

## Step 7: Using workflows within workflow connect

Workflows easily let staff and managers see how both processes and documents fit together. There are several ways to use workflows in Workflow Connect.

### Document library

To view your workflows in the Document Library you can either

- Browse to the folder where you uploaded the workflow. You will be able to recognise the workflows because they will have a  beside the name. Clicking on this icon will open the workflow in the *Workflow Reference* Window.
- Open the *Workflows* folder which contains all the workflows. Once again click on the  icon to open the workflow in the *Workflow Reference* window. **Note:** In Workflow Connect workflows and documents can appear in more than one document.

### Workflow Explorer

The Workflow Explorer shows workflows and any documents, workflows or other Workflow Connect items such as audits that are connected to the workflow. If you have a lot of documents and workflows in your system you will find that the workflow explorer can be the easiest way to browse and find the workflow that you are looking for.

### Workflow Reference

The *Workflow Reference* window displays the workflow details. You can look at the details for individual steps in the workflow, including accessing reference documents for that step and jumps to other workflows.

On the left side of the *Workflow Reference* window you will see the workflow diagram. On the right you will see detailed information for the workflow or selected part of the workflow.