Connecting People, Process Information & Data

Getting started in Workflow Designer

Prior Learning

1. While it helps to have some knowledge of workflows or business processes, it is not necessary for this lesson.
2. If you are not familiar with workflows you may want to read the tutorial “What are Workflows” in the online tutorials.

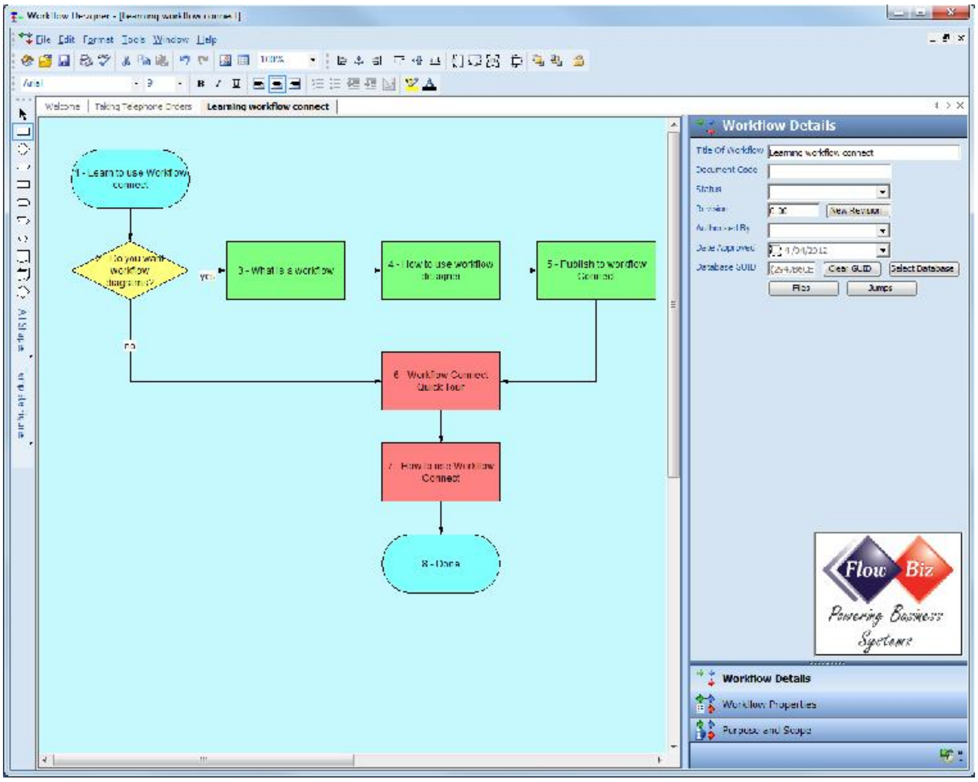
Learning Outcomes

1. Be able to use Workflow Designer as a standalone tool.
2. Be able to create a workflow chart.

Document Details

Workflow Designer 4.2

Revision 1.0



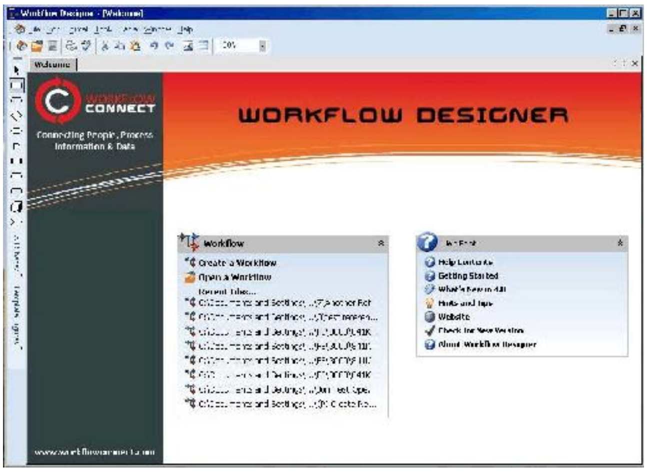
Introduction

Workflow Designer is an easy to use professional tool for creating workflow diagrams and populating them with associated information and documentation. This information can be shared by people on a local network, turned into reports or published and shared online in the cloud with the Workflow Connect online cloud service.

Step 1: Create a new workflow chart

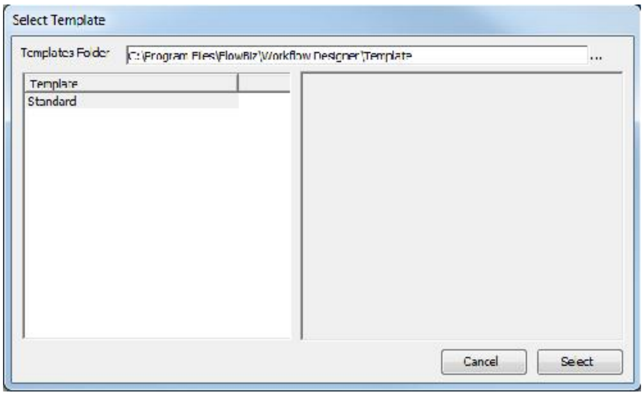
If Workflow Designer is not open you need open it.

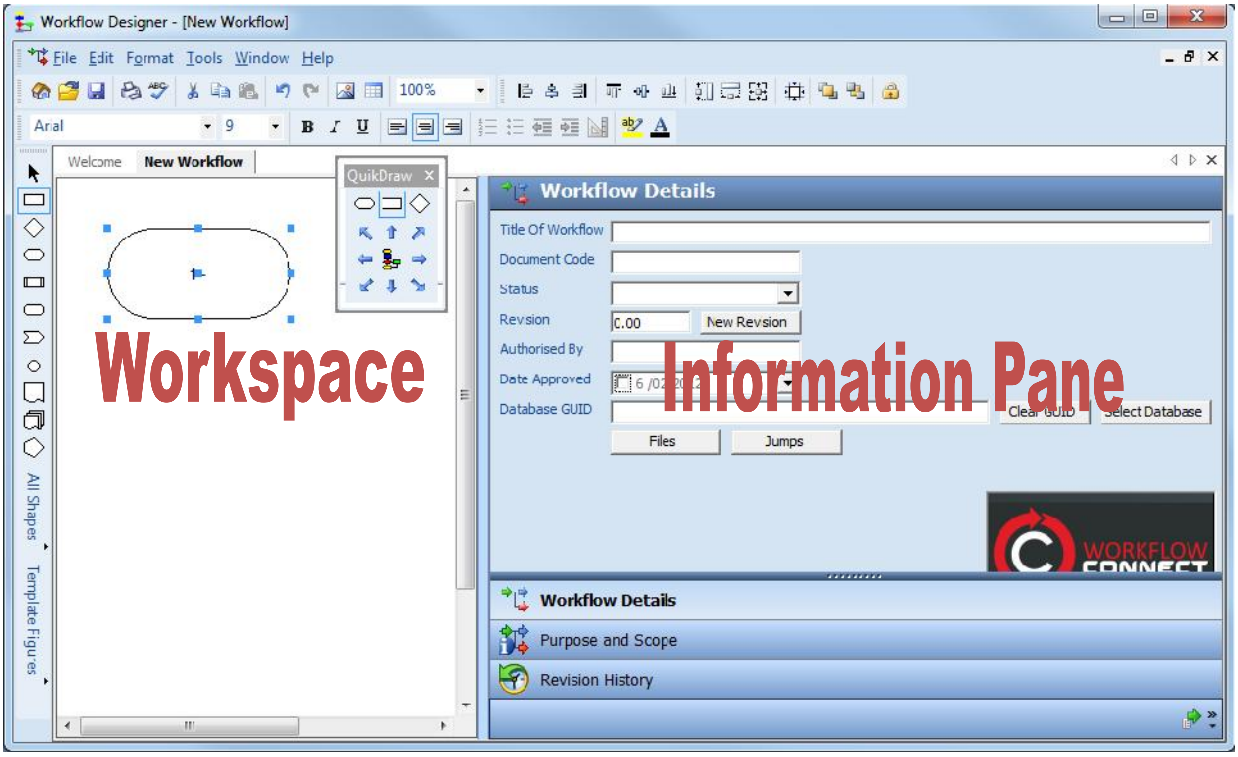
1. Click on the *Start* menu.
2. Go to *All Programs | Workflow Connect.*
3. Click on *Workflow Designer* to open Workflow Designer.
4. This will open up the Workflow Design main screen.



To create a new Workflow Designer chart

1. Click on *Create a Workflow* on the main screen.
2. This will bring up the *Select Template* dialog box which will display the various templates available on the computer. You should at least have the *Standard* template. Select this template then click on the *Select* button.
3. This will open up the Workflow Designer main screen. On the left of the screen you will see the Workspace where you can create and edit charts and on the right you will see the Information Pane where you can enter and edit documentation details.

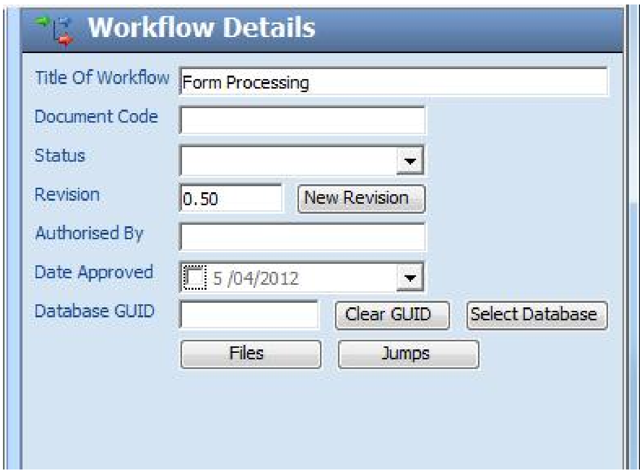


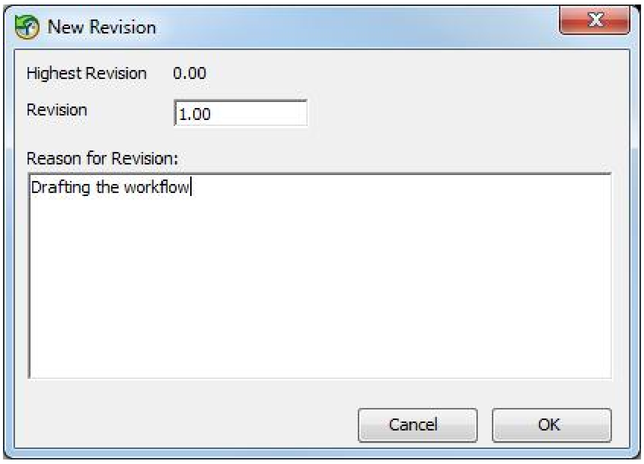


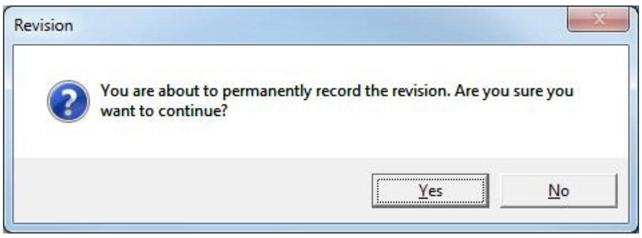
Step 2: Add Workflow Details

We should enter in basic information into the information pane and then save the document.

1. The most important information we need to enter is the *Title Of Workflow*. When you save the workflow it will create a name based on this (though you can change the filename if you wish).
2. *Document Code* is not necessary but very useful if you use internal document codes in your organisation. For this tutorial we will leave this field blank.
3. We are just starting on this workflow so we will set the *Status* to *DRAFT* (one of Workflow Designer's simplest document management features).
4. *Revision* is another Workflow Designer document management feature. Click on *New Revision* to add another revision record to this document. This brings up the *New Revision* dialog box.
5. Enter a new revision number into the *Revision* box. The number itself doesn't matter as Workflow Designer has flexibility to accommodate your organisation's version number conventions.
6. The number order doesn't matter so you can work flexibly with revision numbers to meet your company's internal document needs.
7. You must enter a *Reason for Revision* before clicking *OK*.
8. You will be reminded that this revision will be permanently recorded.
9. Click *Yes* to accept.



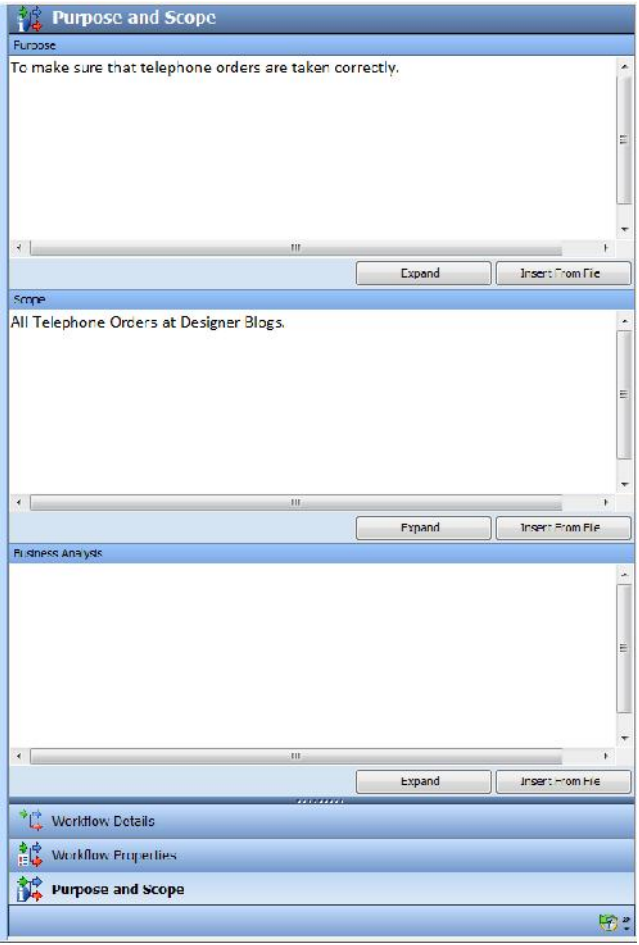




At this point we don't need to enter any additional information in workflow details. In fact even *Status* and *Revision* are optional.

Step 3: Add Purpose, Scope and Business Analysis

There is no specific order in how you go about creating a workflow, however generally before starting you want to document why you are creating the workflow. This is done in the *Purpose and Scope* Information Panel.



1. In the Information Pane towards the bottom of the pane, click on the *Purpose and Scope* button.
2. This will change the Information Pane to the *Purpose and Scope* panel.
3. This information doesn't affect the workflow diagram, however it will be used when generating reports and is generally useful as a way of providing details to a user about what the workflow diagram represents.

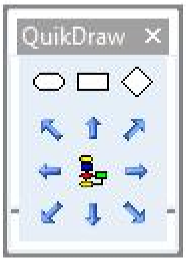
We can enter information into these sections in 3 ways.

1. Directly in the text boxes in the Information Pane.
   - We can type (or copy text) directly into the text box.
   - You can apply formatting from the main screens formatting toolbars.
2. Using a full screen text editor.
   - To get a full screen text edit click on the *Expand* button.
   - This opens up the text edit window.
   - When you have finished entering text click on the *OK* button.
3. We can also insert text from a file. To insert text from a file into one of the panel section.
   - Either in the panel or in the full screen text editor click on the *Insert From File* button.
   - You can insert, Word, RTF, text and in house Devware formatted files.

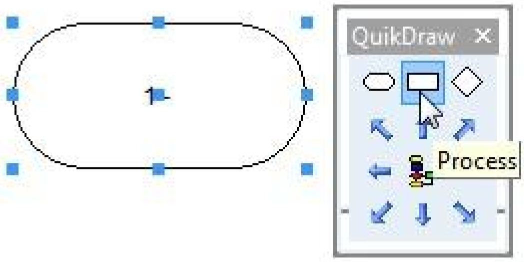
Purpose	Scope	Business Analysis
This is the reason why you are creating the workflow.	Scope defines which areas the workflow does or does not cover.	This section allows you to enter any general information about the workflow that cannot be easily captured by the workflow. Very often users will use this as a notepad where they can put in details and information they are initially not sure how to put into the workflow chart. Once it is in the workflow chart they will delete this information from the *Business Analysis* section. It is particularly useful for analysts as this additional information can be generated into a separate report.

Step 4: Add steps with the Quik Draw Pallet

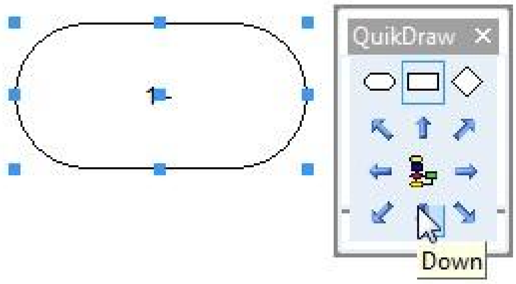
Finally we are on step 4 and we can start drawing the chart itself. In fact we could have started drawing the chart from step 2, but when creating workflow diagrams we are not just drawing pictures but attempting to correctly analyse and capture both process information and related documents.

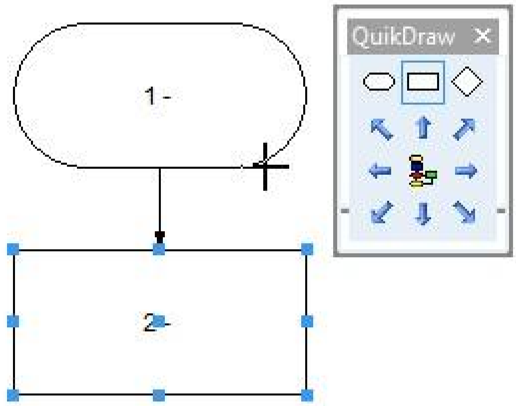


Drawing charts in Workflow Designer is simplicity itself



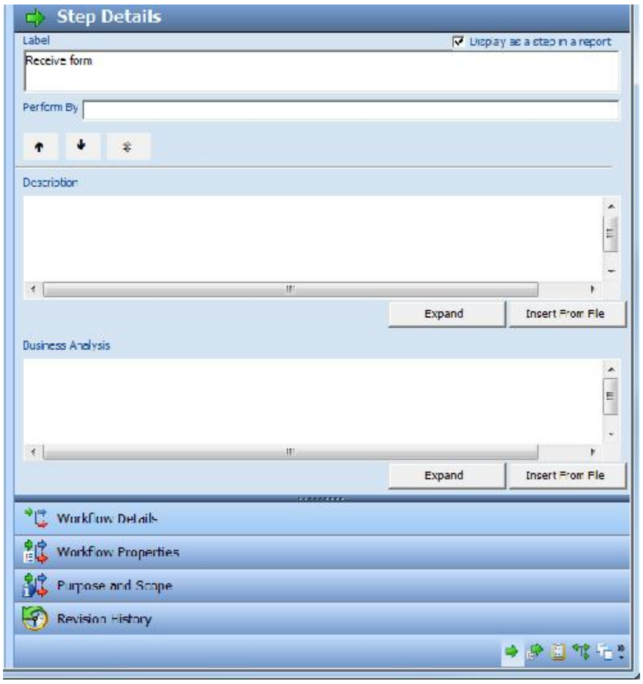
1. The standard template places in a single shape (also referred to as figure or step) on our chart workspace.
2. Click on this figure and you will see the *QuikDraw* palette floating toolbar which shows 3 of the many possible workflow chart figures.
3. We want to add a process step to our chart. Processes are represented by rectangles. Click on the rectangular process symbol on the *QuikDraw* palette.
4. Then click on the down arrow.
5. This will add a process box under the first shape. This new figure will now be the selected figure.
6. We can now add in a decision by clicking the diamond shaped decision figure.
7. Once again click on down arrow to put the decision below the selected decision box.
8. Let's add one more process then the rounded terminate figure.
9. Click on the process rectangle in the *QuikDraw* palette again and click on the down arrow.
10. Then click on the rounded terminate figure in the *QuikDraw* palette and once again click on the down arrow.
11. We now have a workflow chart that has 2 processes and one decision. As you can see it is easy to get started in Workflow Designer.





Step 5: Add details to steps

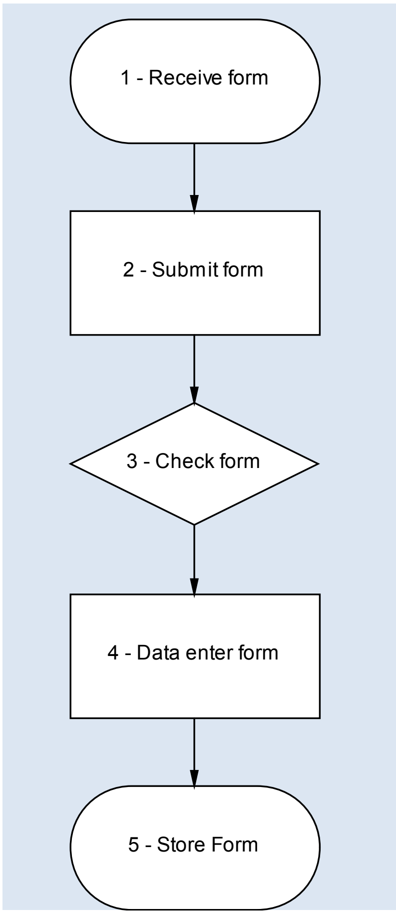
We have a basic chart structure but we have no labels or other information for chart steps. We can add details for each figure or step in the workflow chart. Let's put in the information for this workflow.



1. Click on the first figure. This should bring up the *Step Details* panel. (If the step panel doesn't come up try double clicking on the figure or you can click on the *Step* button down the bottom of the Information Pane.
2. In the *Label* section enter the label for the figure. This will appear in the chart figure. In this case we want to enter the action that causes the process to start, in this case "Receive form".

> You can use the label quick edit by clicking on a figure then pressing F2 to enter or edit the labels.

3. Perform by could be the name of the person, their position, a department or group. If a performers list has been selected in the Options dialog, Perform By becomes a button to select the performers from a list. Clicking on the button displays the Performers List dialog. As we don't have a performer's list configured we will just type in the title of the performer "Administration Officer".
4. In the *Description* and *Business Analysis* sections you can add in other details. Remember that this information will be used to generate the automatic reports.
5. Add in labels for the other figures so that the workflow chart looks like this.



While it won't be covered in this tutorial, Workflow Designer allows you to include extensive information for each step, including

- **Step Details:** Which we have just covered.
- **Tasks:** List of tasks for this step (sometimes called work instructions).
- **Jumps:** This is a link to another workflow. It could be a workflow that explains a step in detail or jumps to a different process.
- **Files:** Documents from your local system or are published online into the Workflow Connect document management system can be linked to a step.

In addition the figures are fully customizable through the use of

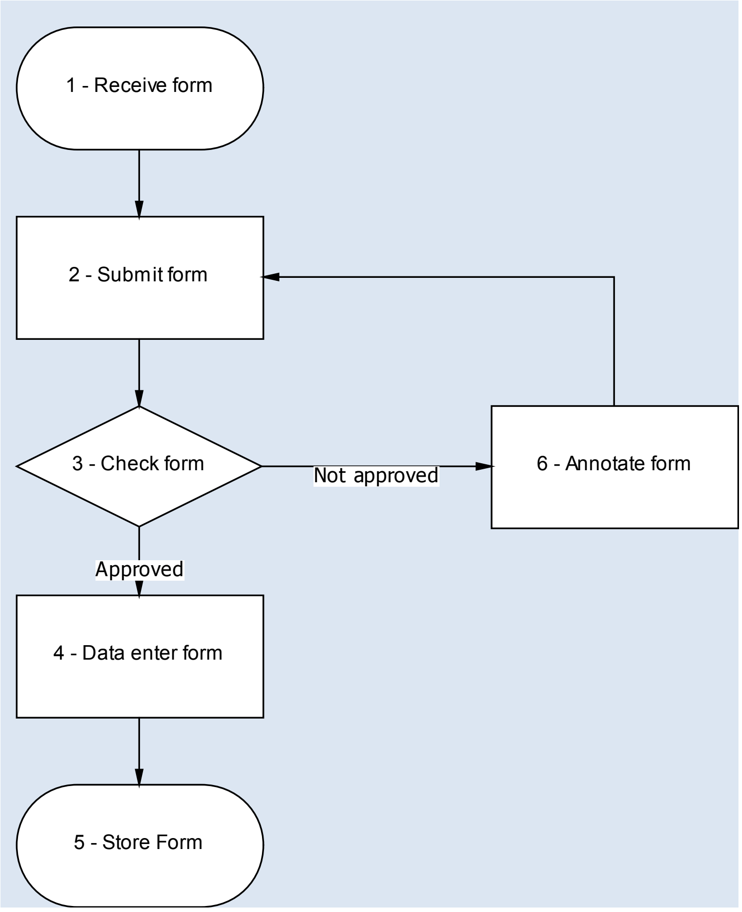
- **Figure Properties**: change the appearance of a figure.

Step 6: Add another path (flow line) to the workflow

The workflow chart is looking pretty good so far. The main problem is the decision. We need to have at least two paths – or flow lines – coming from a decision diamond with the appropriate labels on the lines.

To add a second process figure from the decision:

1. Click on the decision diamond (Step 3 in our chart) to select it.
2. Then click on the Process rectangle in the *QuikDraw* Palette and then click on the right arrow.
3. This will add another process figure to the right of the decision diamond (step 3).
4. Open the step panel by clicking on the new process figure and add in the label "Annotate form."



We need to now have a flow line that returns to the submit form figure (figure 2).

1. Click on the Annotate form figure to select it.
2. Put the mouse over the centre of the figure, the arrow will change to a vertical arrow pointing up.
3. Click and drag the mouse onto the figure that you want to connect the current shape to, in this case the Submit form figure.
4. A diagonal line will be draw between the 2 figures.

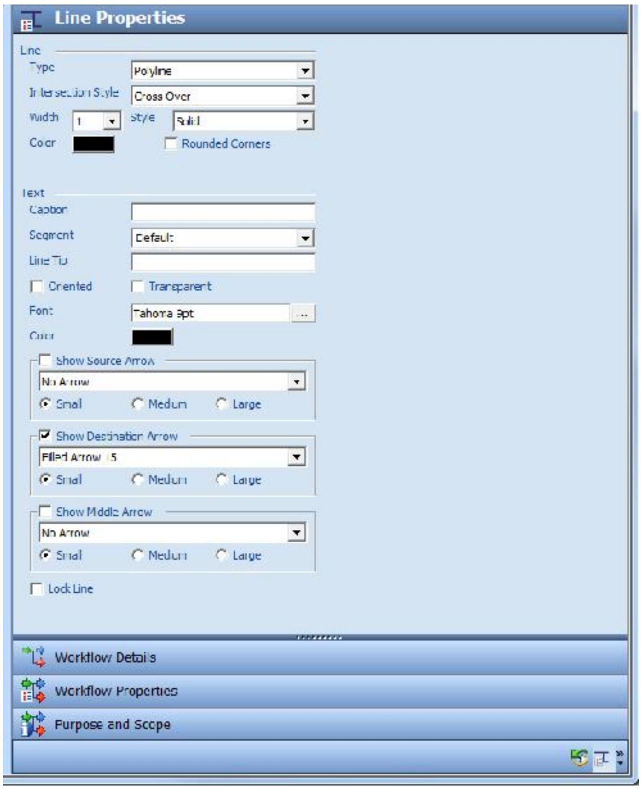
Note: the line won't look neat yet, we will have to deal with that in the next step.

Step 7: Improve lines

Now we want to make the lines look better by changing their type and adding labels.

To change the diagonal line to a right angled one

1. Click on line. This will bring up the *Line Properties* panel.
2. To change the line from a diagonal line to a right angled line we need to change the line *Type* from *Polyline* to *Vertical-Horizontal.*



We also want to add labels to the lines coming from the decision diamond.

1. Click on the line going down from the decision diamond.
2. In the *Line Properties* panel type the caption "Approved" in the *Caption* box.
3. Click on the line to the right of the decision diamond and put the words "Not approved" in the *Caption* box.

We now have our fully labelled diagram. But it is likely that your workflow chart is like mine, a little crowded making it a little hard to read the text. So we can move the figures around. To move the Annotate Form figure

1. Click on the Annotate Form figure, to select it.
2. Now click and drag the mouse to the right so that you can clearly see the line label.

Additional tasks

We have created a basic workflow. However there is a lot more that we can do with Workflow Designer.

- We can add in additional information for steps including, *Tasks*, *Files* and *Jumps*.
- We can customize the workflow diagram. Workflow Designer is so versatile that many people also use it to hierarchy diagrams and mind maps in addition to using it to create workflow diagrams.
- Workflow Designer can also be used to generate *Reports*.
- If you are interesting in sharing workflows and information with other users then you can publish online to Workflow Connect cloud service.