

Linking documents to workflows from workflow connect

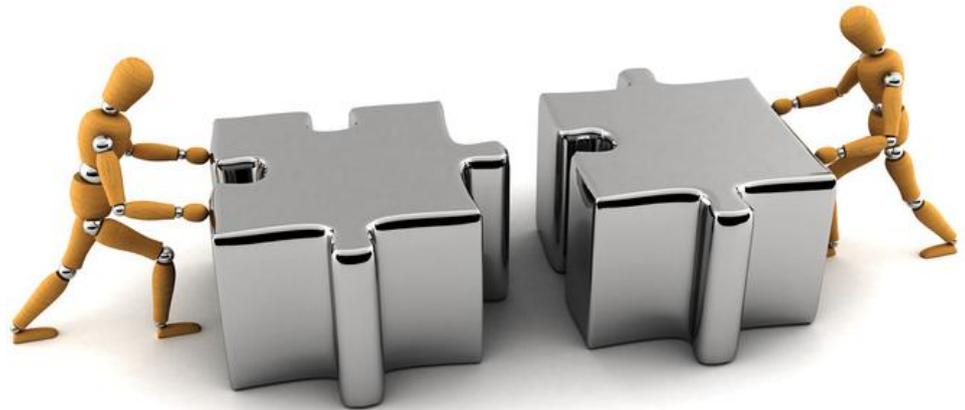
Prior Learning

It is helpful but not essential that the learner has the following knowledge

1. A basic understanding of workflows or process maps.
2. Has 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 workflow 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 connect workflow diagrams to documents 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.



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 and have them available in the right order at the right time in a workflow.

This tutorial will take you through an example for:

- Creating a workflow in Workflow Designer.
- Setting up folders and uploading documents in Workflow Connect.
- Linking the workflow diagram to documents.
- Uploading the workflow into Workflow Connect.
- Using the workflow within Workflow Connect.

Document Details

- 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.

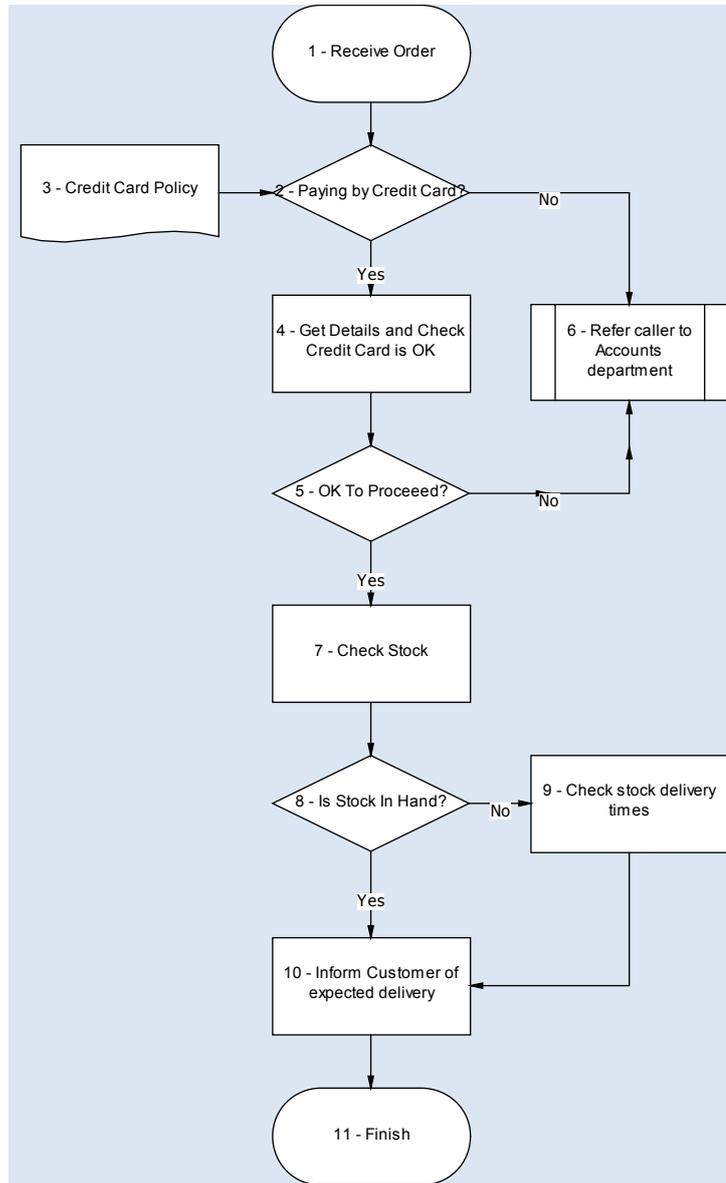
Step1: Create a Workflow with Workflow Designer

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>

An important point to note is that with Workflow Designer you can create workflows without being connected to the internet. We will create the workflow without including any documents yet. Our goal here is to get the workflow correct and easy to follow.

Hint: Very often in working with workflows we start by creating the workflow diagram and then use that to identify what documents we need to connect to or create for that business process.

If you haven't used Workflow Designer before you may want to start with the getting started guide installed and available in the Workflow Designer help or use the [online tutorial](#). However the help below is easy to follow for even a beginner user.



Create a new Workflow Diagram

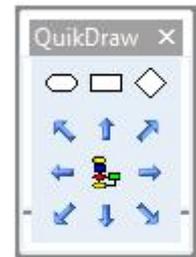
1. From the Home (Welcome) screen click on the *Create a Workflow* option.
2. This will bring up the *Select Template* dialog box.
3. Choose the *Standard* template and click *Select*.
4. This will create a new workflow with a single *Terminate* shape for the beginning of your workflow.
5. Enter a title for the workflow in the *Title of Workflow* field of the Information Pane on the right side of the Workflow Designer screen. 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. The words that you typed will 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 on the *QuikDraw* toolbar 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 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. Type “Get details and check that credit card is OK” in the step label.
4. Now again click on the *Paying by Credit Card?* step to select it again.
5. Make sure that the rectangular *Process* shape has been selected in the *QuikDraw* toolbar.
6. This time click on the right arrow to put the process box to the right of the decision step.
7. Type “Refer caller to Accounts department” in the step *Label*.

Add a document step

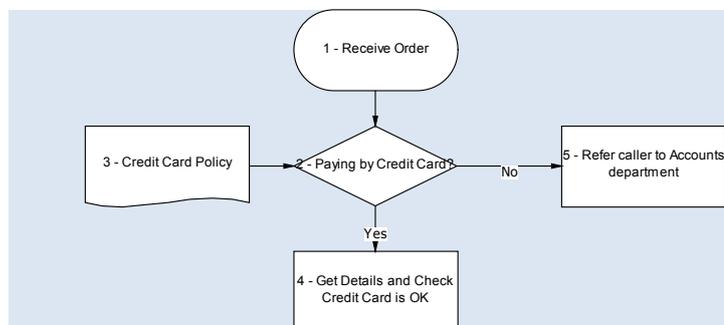
We can add a document to any step in the workflow diagram. However we are going to add our document to a document step.

1. As there is no room on the left of the diagram we will need to move the whole diagram to the right.
2. From the *Edit* menu choose *Select All* (or press CTRL-A).
3. Click on any highlighted figure and drag the complete diagram over to the right so that there is enough room to add a step to the left of the decision step.
4. Click on the background of the Workspace to cancel the selection.
5. Click on the decision step labeled *Paying by Credit Card?* so as to select it.
6. From the Figure toolbar on the left of the screen click on the *Document* shape.
7. Then click on the left arrow in the *QuikDraw* toolbar. **Note:** if you can't see the *QuikDraw* toolbar then it means that you don't have a step selected.
8. Type *Credit Card Policy* in the step *Label*.

Complete the diagram

If you want, add in the rest of the steps to complete the diagram. To use this tutorial you won't need to have all the steps in the diagram, just what we have already completed.

Note: Don't add in a jump to another diagram at this stage as we will look at jumps in a different lesson.



Save the diagram

Save the diagram to a location that you can readily access. Saving will automatically save the file the same name as the chart. You can change the name to whatever you find is the most convenient, the same as saving any electronic file.

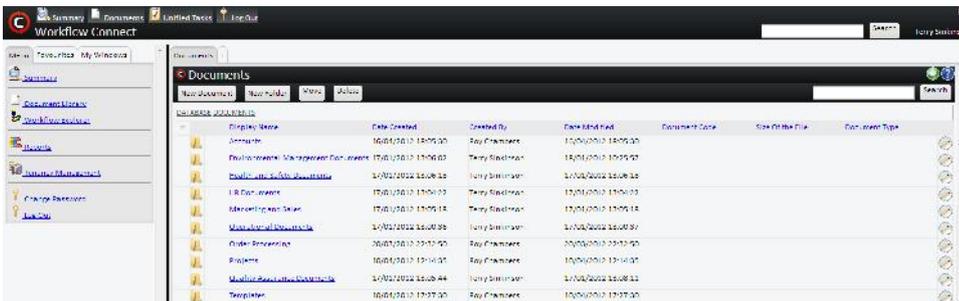
Step2: Place documents in Workflow Connect

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.

For this example we will simply add all our documents to a single folder called Order Processing. .

Create Folder

1. Log into Workflow Connect. If you are using a regular account then you will log in using 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. If you are a new user then the folder list will be empty.
3. This will bring up the *Document Library* screen similar to the one shown below



4. Click on the *New Folder* button to bring up the *New Folder* screen.

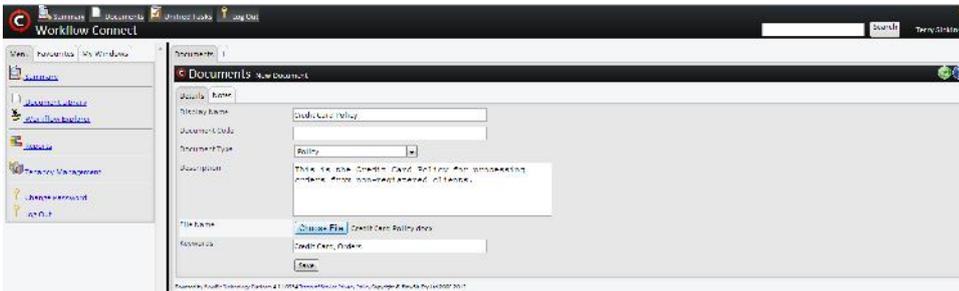


5. Type in "Order Processing" into the *Display Name* field.
6. You can also fill in additional details into the other fields, however this information is not needed to create a folder. The other information is handy as it used for searching for key words or notes.
7. Click on the *Save* button.
8. This will return to you the *Document Library* screen. You should see the *Order Processing* folder listed.

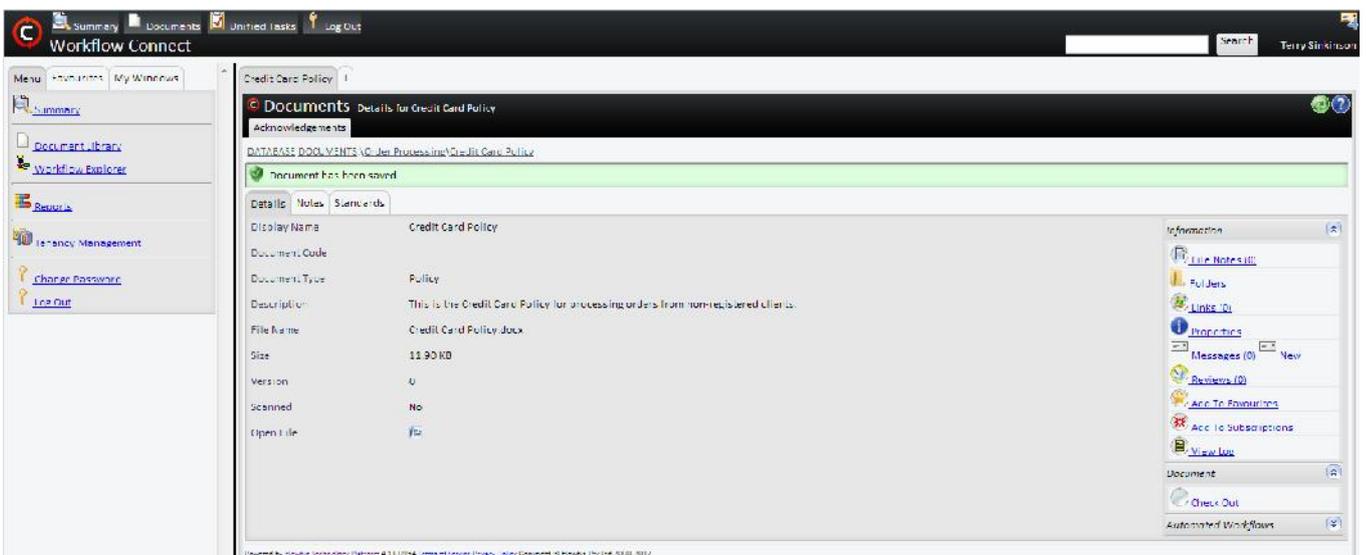
Upload Documents

We will upload a document for the credit card policy step. **Note:** for this tutorial you can create a blank Microsoft Word document titled “Credit Card Policy” or use any document on your local system.

1. Click on the *Order Processing* folder to open it.
2. Now click on the *New Document* button to open up the *New Document* screen.



3. Type “Credit Card Policy” into the *Display Name* field.
4. To select the document that you want to upload, click on the *Browse* button and browse your local computer or system to locate and select the document.
5. The others fields are all optional.
6. Click on the *Save* button to upload the document.
7. You will see a screen displaying a summary of the details of the document and displaying a message that it is has been successfully saved.



8. Next to where it says *DATABASE DOCUMENTS* at the top of the screen: click on *Order Processing* to return to the Order Processing folder.

Note: For this tutorial we will upload and use only a single document, but you can continue to add other documents if you have them.

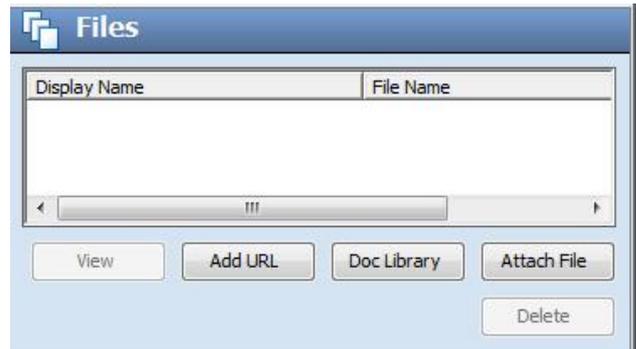
Step3: Link to Workflow Connect

Now that we have a document in Workflow Connect and a workflow diagram we can link them together. Once linked we will be able to access that document from the workflow diagram by going to the step where the document is linked.

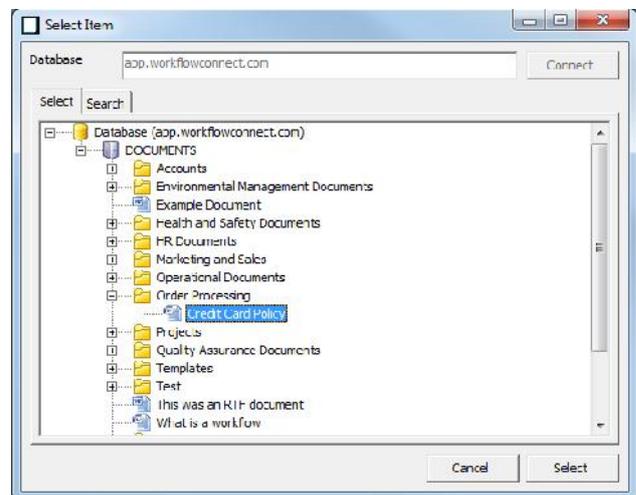
Attach documents from Workflow Connect

1. First choose the step where you want to include a document, for our example it will be the *Credit Card Policy* step.
2. In the Information Pane on the right hand side of the screen click on the *Files* button at the bottom of the pane.
3. This opens up the *Files* panel. You will see a list of documents that are currently attached to this step. So there should be no attached files yet.
4. Click on *Doc Library* button to connect to your Workflow Connect database so we can attach a file.

Note: If you want to like to a document on your local computer or system then use the *Attach File Button* instead.
5. This will bring up the *Workflow Connect Webservice Logon*.
6. For general Workflow Connect users the *Server* will always be `app.workflowconnect.com`. **Note:** If you can't connect to the service with this server address contact your system administrator as some organizations will use their own dedicated server with a unique address.
7. Type in your Workflow Connect *Login Name* and *Password* (the same username and password you used when you uploaded the document).
8. Click on *OK* to open up the Workflow Connect Document Library. From here you will be able to select the document.
9. 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 saw in the *Document Library* screen in Workflow Connect.
10. Click on the + beside *Order Processing* to see the document we had previously uploaded to that folder.
11. Click on the document titled *Credit Card Policy* and click on *Select*.
12. You should now see the document listed in the *Files* panel. **Note:** the file has not been downloaded to your computer, it is still stored within Workflow Connect. Though if you click on the *View* button the document will be temporarily downloaded to your computer so that you can view it.



Note: Use the *Options >>* button to configure network settings which allows you to work with proxies, fire walls and servers that support SSL certificates.



If you have additional documents for other steps you can continue to attach them.

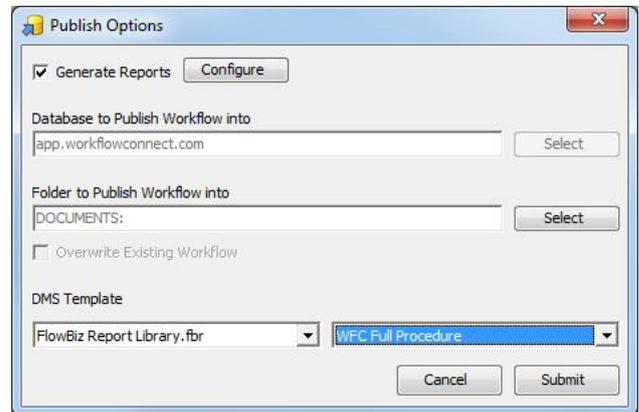
Step4: Upload the workflow to Workflow Connect

Our workflow is linked to the online documents but it is not available online yet.

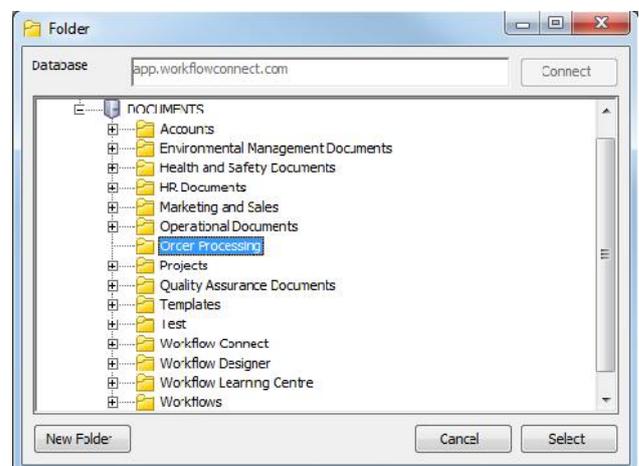
Hint: if you don't need to give other people access to workflow diagrams online then there is no need to upload them. You can use them on your local computer or system and remain linked to the online documents without uploading the workflow diagram to Workflow Connect.

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

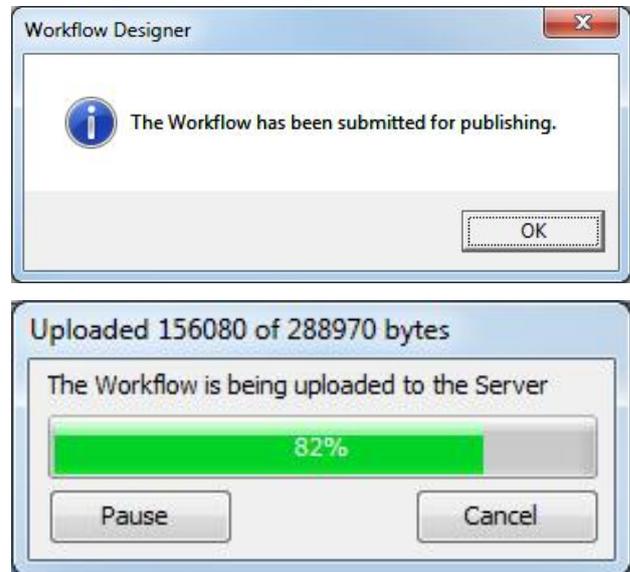
1. First save the workflow file.
2. From the *File* menu choose *Publish*.
3. This opens up the *Publish Options* dialog box.
4. First we want to choose which database to publish the workflow to by clicking on the *Select* button in this section. **Note:** if the *Select* button is greyed out and a web address already appears in the database field, then you are already logged in.
5. This will bring up the *Workflow Connect Webservice Logon*.
6. For general Workflow Connect users the *Server* will always be *app.workflowconnect.com*. **Note:** Your login details will be same as the logon you used when you connected the workflow to online documents.
7. Type in your Workflow Connect *Login Name* and *Password*.
8. Click on *OK* to login and return to the *Publish Options* dialog box. The dialog box will now display the selected server.
9. Now we want to choose the location to display the workflow. Where it says *Folder to Publish Workflow into* click on the *Select* Button.
10. Click on *OK* to open up the Document Library from where you can choose the folder into which you will upload the document.
11. 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.
12. We will publish this workflow to the *Order Processing* folder so click on that folder and click on the *Select* button.
13. You will now see the selected folder name displayed in the *Folder to Publish Workflow into* field.
14. If you are replacing an older version of the workflow make sure you have checked the *Overwrite Existing Workflow* checkbox.



Note: Use the *Options >>* button to configure network settings which allows you to work with proxies, fire walls and servers that support SSL certificates.



15. 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.
16. You can also include a report that will appear in the Document Management System beside the Workflow using the *DMS Template* drop.
17. Click on the *Submit* button to publish the workflow to Workflow Connect.
18. Workflow Designer will then prepare the workflow for online publishing. This may 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*.
19. Click on the *OK* to send the document to the online Workflow Connect database.
20. You will then see a progress bar as the workflow uploads.
21. When this dialog box closes your workflow has been uploaded.
22. You should now be able to see the workflow in Workflow Connect.



Step5: 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

There are two ways that you can view workflows from the Document Library

- 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 only shows workflows. 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. With *Workflow Explorer* you can search for Workflows based on a number of criteria such as name, published date, date created .

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.