



Connecting People, Process
Information & Data

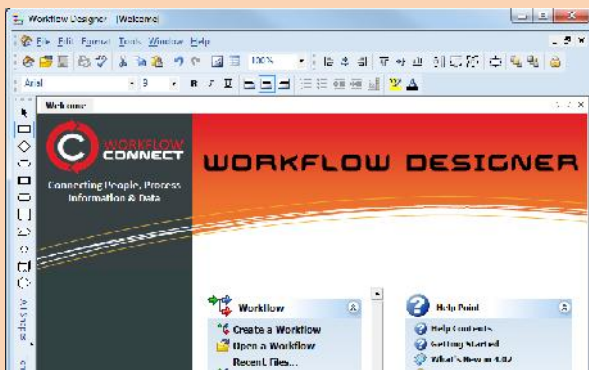
Linking documents to workflows: Quick Start



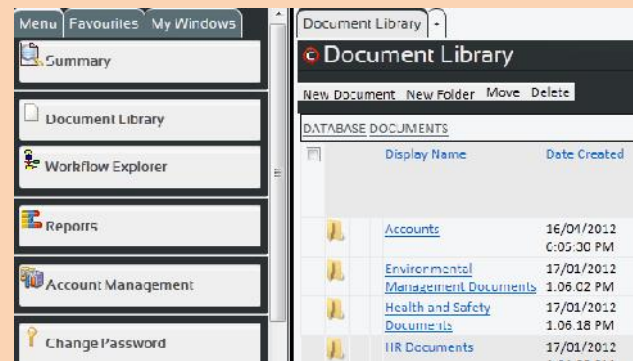
Workflow Connect 4.1
Workflow Designer 4.1
Revision 1.0

Workflow Connect has both a workflow system and a Document Management system. You can link workflow steps to documents meaning documents are available at the right time in the right order.

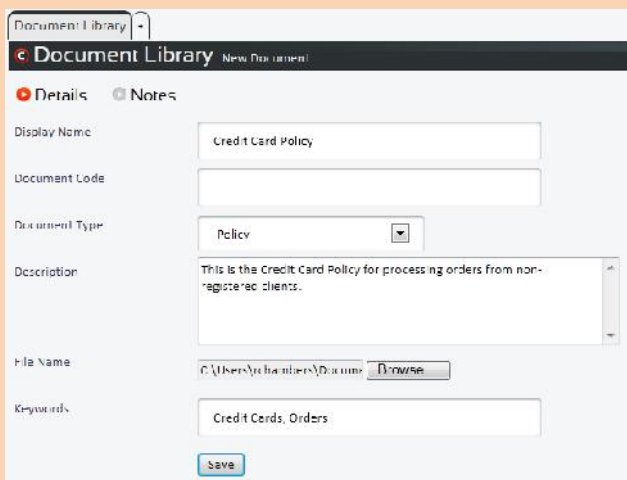
1 Workflow Designer is the Desktop tool used to author workflows for Workflow Connect. If a workflow doesn't exist, Download Designer and create the workflow that documents will be linked to. www.workflowconnect.com/download



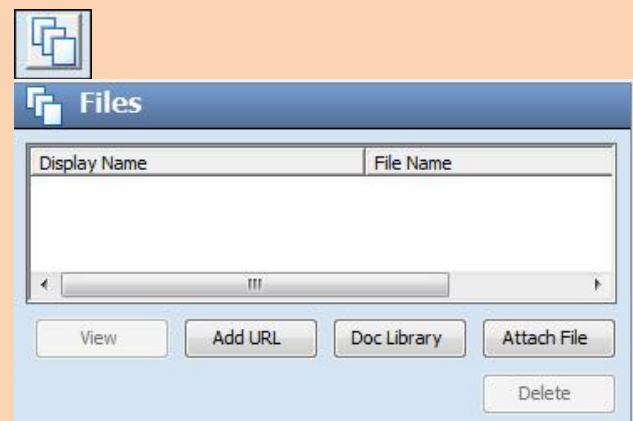
2 Next we need to use Workflow Connect to upload documents into the cloud. Use the document library to create folders to organise the documents.



3 Upload documents to the folders by clicking on the *New Document* button in Workflow Connect. Complete as much information as you can and then save. The document is then uploaded into the document library (*Doc Library*).



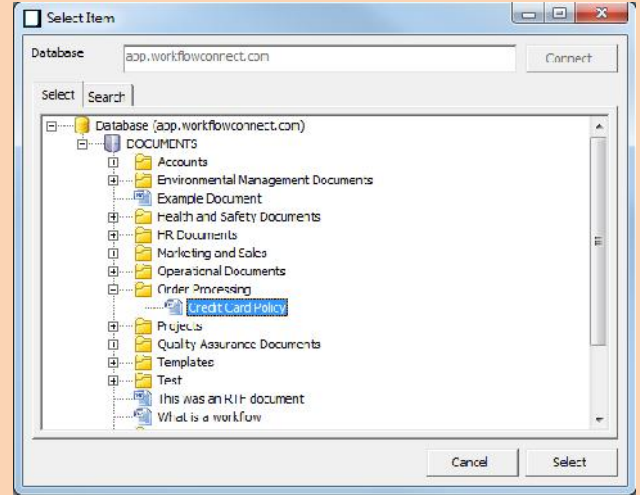
4 In Workflow Designer, selecting the step that you want to attach a document and then click on the *Files* button in the Information Pane. Click *Doc Library* to use online documents in Workflow Connect and start the login process if you are not logged in to Workflow Connect.



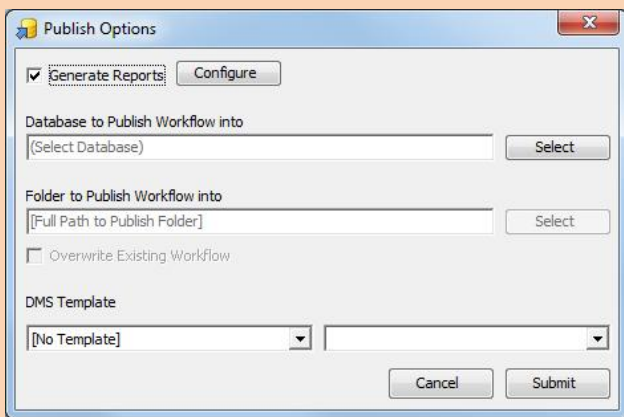
5 Type in your Workflow Connect Login Name and Password to connect to Workflow Connect. If you have a secure connection (SSL) choose Options >> and select SSL. If you are on a corporate network check with the administrator for any special settings.



6 Browse the document library in Workflow Connect to Select the document that you want to connect to from the step in 4.



7 When you have finished uploading all the documents for that workflow (following step 6) you can Upload the Workflow to Workflow Connect by going to File | Publish and from the Publish Options, select the location to publish the Workflow.



8 In Workflow Connect you will then be able to browse the published Workflow and see which documents are attached to each step by clicking on the Workflow steps and selecting Attachments. Clicking on file the link will open and download the file. All attachments can be viewed and downloaded by selecting attachments from the top menu.

