



Workflow Connect is designed a repository of your businesses knowledge, in particular the documents and procedures that are essential to ensure that work is carried out correctly.

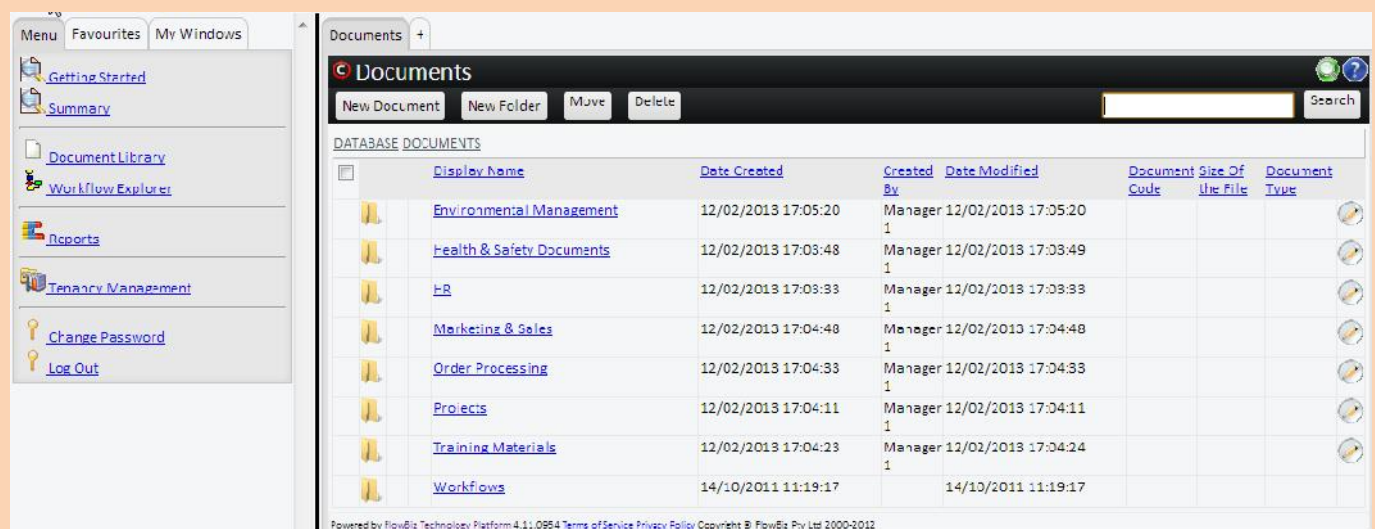
Once you have everything setup users are able to login, browse for documents, open and use them.

1 Use the *Document Library* to browse

Users can browse the documents by

1. Clicking on *Document Library* to open the document library.
2. Clicking on the name a folder to open that folder and display its contents.
3. Opening a document is simply a matter of click on the name of that document.

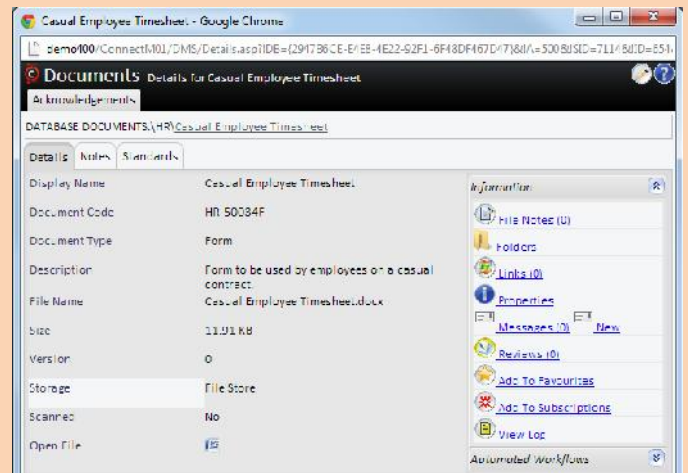
Note: you can also look for documents by typing the name in the *Search* box.



Display Name	Date Created	Created By	Date Modified	Document Code	Size Of File	Document Type
Environmental Management	12/02/2013 17:05:20	Manager 1	12/02/2013 17:05:20			
Health & Safety Documents	12/02/2013 17:03:48	Manager 1	12/02/2013 17:03:49			
HR	12/02/2013 17:03:33	Manager 1	12/02/2013 17:03:33			
Marketing & Sales	12/02/2013 17:04:48	Manager 1	12/02/2013 17:04:48			
Order Processing	12/02/2013 17:04:33	Manager 1	12/02/2013 17:04:33			
Projects	12/02/2013 17:04:11	Manager 1	12/02/2013 17:04:11			
Training Materials	12/02/2013 17:04:23	Manager 1	12/02/2013 17:04:24			
Workflows	14/10/2011 11:19:17		14/10/2011 11:19:17			

2 View a document's meta data (details screen)

1. Click on a document to open the document details screen. This screen shows the meta data for the document.
2. The main screen shows the list of details for that document.
3. On the right-hand side you will see a control panel for various features and actions you can do with the document.
4. You will also see tabs for additional information such as *Notes* and *Standards*.




3 Opening a document

1. Workflow Connect can work with any type of document, which means that you can upload all types of documents into Workflow Connect, including Word Documents, PDF, videos and so on, however you will need the appropriate software on your computer to be able to view them.
2. In this example it is a Microsoft Word document so you will see a Microsoft Word icon beside *Open File*. If it was a PDF you would see a different icon, and a spreadsheet an Excel icon and so on.
3. Click on the icon to open the document.
4. It will download and open on your local computer. At this stage anything you do to the document you have open will have no effect on the document in the document library.

4 Changing the document and document details

Changing a document means that you need to Check it out and when you have finished making changes check it back in.

1. To start the check out process click on  in the top right-hand corner.
2. This brings up a *Check Out* button in the document panel in the bottom right of the screen. Click on *Check Out*.
3. This brings up the *Check Out Notes* screen. Choose the type of check out that you are doing and if necessary enter additional check out notes.
4. Click on *Check Out* and you can now edit the document meta data.

Note: This lets you directly edit the meta data. To change the document, you need to edit the document outside of the system and then upload the changed document when you do a *Check In*.

