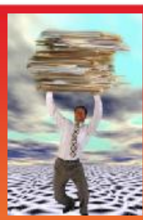
WORKFLOW CONNECT

Connecting People, Process Information & Data

Workflow Connect: Get Started

Create Folders



Workflow Connect 4.11

Revision 1.0

Workflow Connect uses folders to organise both your documents and your workflows. Creating folders are the first step to getting your information organised in Workflow Connect.

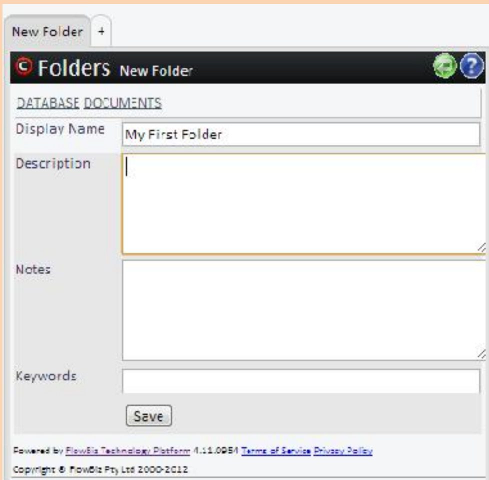
1 Go to the *Document Library*

1. In the *Menu* on the left of the screen click on *Document Library* to open up the document library.
2. If you have just signed up to Workflow Connect then this will be empty except for the Workflows folder.

Note: You can upload workflows to any folder in Workflow Connect, however they will also all appear in the Workflows folder which makes browsing for workflows very easy.

2 Create a folder

1. Click on the *New Folder* button.
2. This brings up the *New Folder* screen.
3. The most important information is *Display Name*, which is the name of the folder.
4. The other optional fields are useful for document management.
   - *Description*
   - *Notes*
   - *Keywords*
5. Click on the *Save* button, this will create the folder and take you back to the *Document Library* screen.



3 Add more folder and subfolders

1. Add additional and subfolders to create an organised structure for you to upload documents and workflows.
2. You are now ready to start uploading documents and workflows.

Note: Generally it is recommended to create folders around who will use them. For example, create a HR or Sales folders rather than Forms or Work Instruction folders. This will make it easy for people to find the documents related to their work all in one place. It also makes it easier administer the permissions for the folder.