

Workflow Connect includes a fully featured document management system. Use Workflow Connect to collect organisations documents into a **central source of truth** and then share them across the room... or around the world.

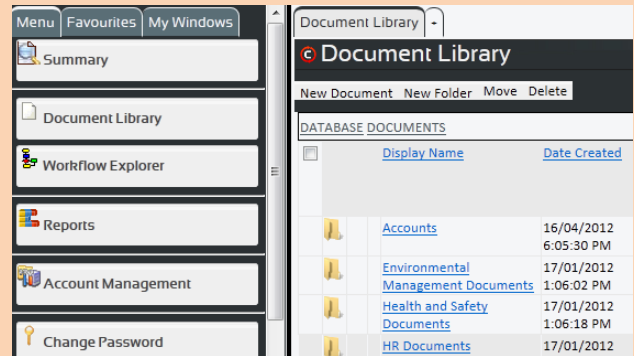
1 Identify Documents

We are building a document library. The first step is to identify the documents that you have or need to create



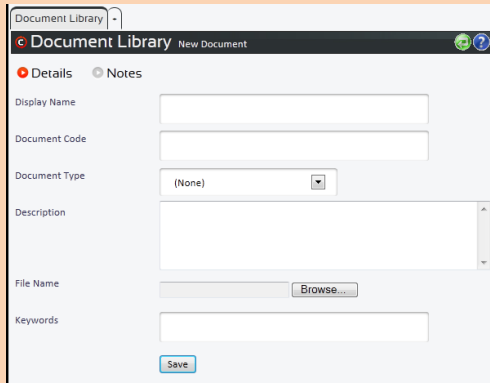
2 Organise Documents: folders

The Workflow Connect *Document Library* is where you store your documents. Click *New Folder* to create folders to store your documents.



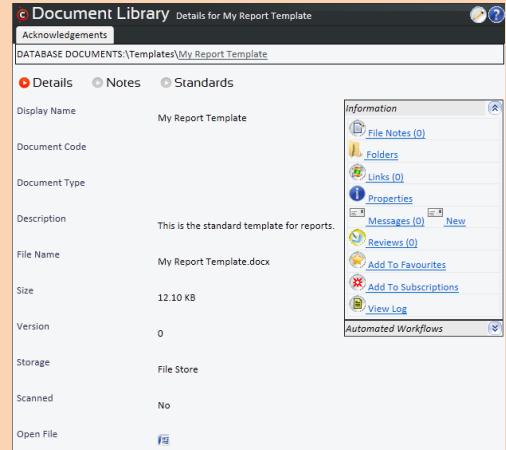
3 Upload Documents

In the *Document Library* from the folder that the document will be uploaded into, click on *New Document* to upload a document and complete the details.






4 View Details (Metadata)

Clicking on the name of a document in the *Document Library* will open the document details screen and display metadata entered in step 3.



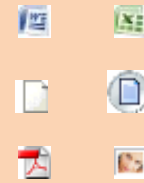
5 Change Details (Metadata)

In either the *Document Library* or *Document Details* Click on the on the  button

1. Click on the on the 
2. Click on *Check Out* 
3. Choose or enter the reason for the check out.
4. Click on *Check Out*.
5. Edit the document metadata.
6. Click on *Check in*.
7. Add comments to the check in and click *Check in*.

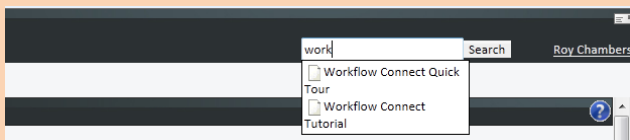
6 View or download the document

In either the *Document Library* or *Document Details* screens click on the document icon to open or download the document



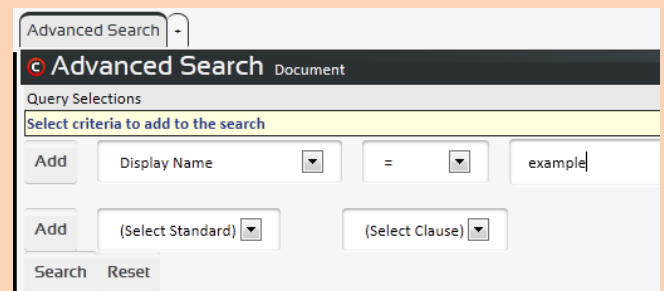
7 Quick Search

You can look for any object stored in the system using the quick search in the main page header



8 Advanced Search

From the *Document Library* you can click on the *Advanced Search* button that will allow you search on multiple criteria



9 Giving access (Point of Use)

How are your users going to easily find the documents that they need? Use features like favourites, folders, links and workflows to make it easy for the user to find the document they need when they need to use it.

- Favourites
- Folders
- Links
- Workflows

10 Sharing and Collaboration

Workflow Connect has a number of features which let you work cooperatively and communicate with other user.

- Acknowledgements
- Reviews
- Subscriptions
- Messages