Workflow Connect: Get Started

Find Documents & Workflows

Connecting People, Process Information & Data

There are many ways to help people find the information they need in Workflow Connect, one of the most useful is Workflow Connect's powerful search features that will make it is easy to find the document or workflow they need now.

1 Search from the Title Bar

1. When searching for anything in Workflow Connect an easy place to start is in the Title Bar *Search* which you will see in the top right-hand side of the screen.
2. Type in the full or partial name of the item that you want to find and click on *Search.*
3. The result will be based on both the name of item and any associated metadata such as description, keywords etc.

Note: If you are using additional business modules with Workflow Connect then the Title Bar search will find results for other items, not just document or workflow.
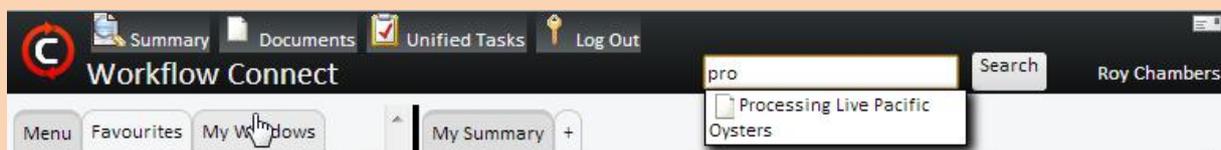
2 Document Library Quick Search

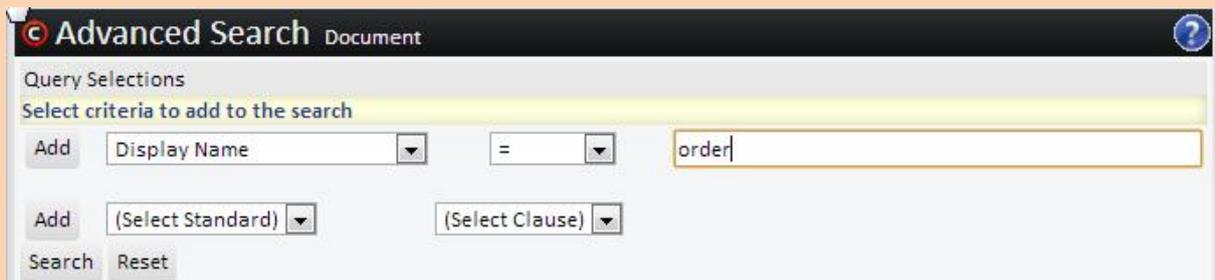When you open the document library there is also a quick search box.

1. Simply type in a search term or terms and click on the *Search* button.
2. Search results will be any document or workflow with any of the search terms in their name, description or other metadata.

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3 🔍 Advanced Searched

So far we have been searching on key words that can apply to the document or workflow title or any of the document metadata. When we use *Advanced Search* we are able to search for specific criteria.
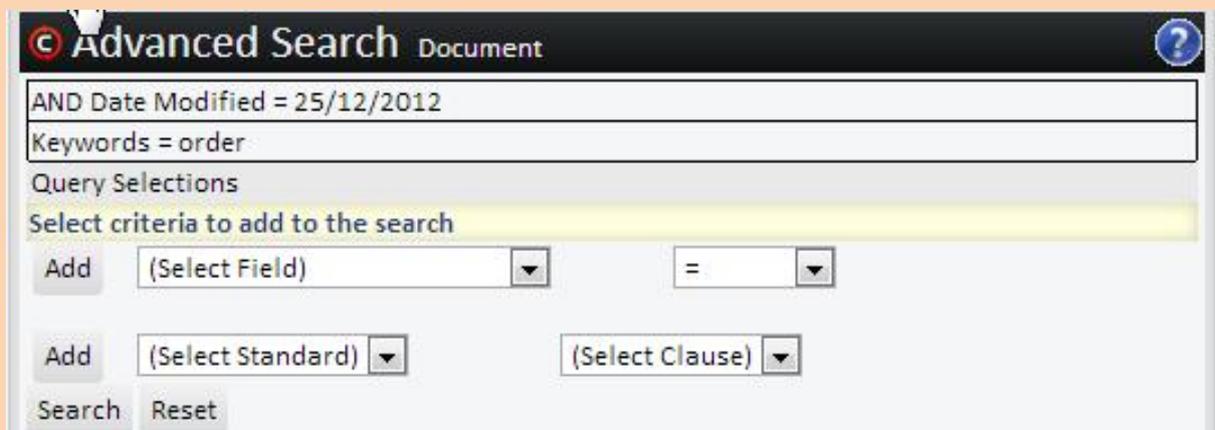
1. In the *Document Library c*lick on the *Advanced Search icon* 🔍.
2. To search for a single specific criterion, in the drop down menu where it says *(Select Field)* choose the field to search on. In the example here we are using *Display Name.*
3. Choose an operator, in our case we are using = which means the search term must be found in the Display Name.
4. Type in a search term, in the example below we typed in order.
5. Click on *Search* to see the list of documents and workflows with the word "order" in the display name.

© **Advanced Search** Document   ?

Query Selections
Select criteria to add to the search

| Add | Display Name ▾ | = ▾ | order |

| Add | (Select Standard) ▾ | (Select Clause) ▾ |

Search Reset

4 🔍 Search on Multiple Criteria

We can also combine multiple search criteria together to further narrow down the search.

1. Click on *Reset* to start a completely new search in *Advanced Search.*
2. For example, we can search for a document or workflow with a particular keyword that was modified in the last 3 months.
3. Where it says *(Select Field)* choose *Keywords,* choose the operator = and type in the word that you want to search for, in this example I will type "order".
4. Click on the *Add* button to add that search criteria to the list (It appears at the top of the screen).
5. To add a second criteria, such as finding documents or workflows that were modified in the last 3 months, in *(Select Field)* choose *Date Modified.*
6. For the operator choose > (greater than).
7. Because we chose a date field we can either type in a date or use the 📅 button to select a date from the pop up calendar. Let's choose a date 3 months prior to today's date.
8. Click on *Add* to include this as part of the search criteria.
9. Click on the *Search* button to search based on these 2 combined criteria.

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| AND Date Modified = 25/12/2012 |
| Keywords = order |

Query Selections
Select criteria to add to the search

| Add | (Select Field) ▾ | = ▾ |

| Add | (Select Standard) ▾ | (Select Clause) ▾ |

Search Reset

Note: You can also search on standards if you have linked your documents or workflows to standards.

5   Workflow Explorer Search

We can also just search for just Workflows using the Workflow Explorer.

1. From the main menu on the left side of the screen choose *Workflow Explorer*.
2. You can apply a range of filters and search criteria to what you see within the *Workflow Explorer*.
3. For example, we can type the search term "process" in the *Search box*.
4. Then when we click *Apply* we see all the processes with the word "Process" in the name or other metadata (such as description).