Workflow Connect: Get Started

Upload Documents

Connecting People, Process Information & Data

Workflow Connect 4.11
Revision 1.0

Uploading documents into Workflow Connect's powerful fully featured document management system is easy. Even if your main purpose is to upload and share workflows, remember you can link workflows to documents.

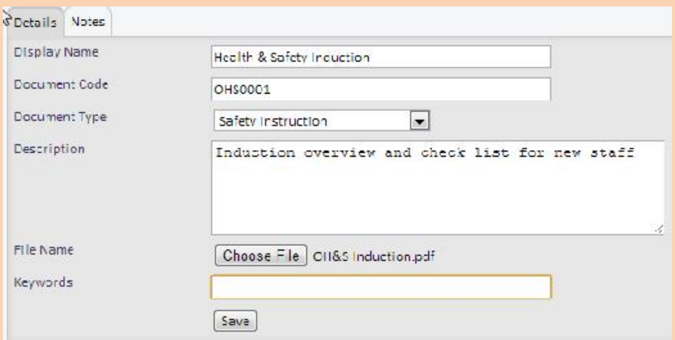
1 Go to the folder where you want the document

First go to the folder where you want to upload the document.

1. Click on *Document Library* in the *Menu.*
2. Browse the folders by clicking on the folder name that you want to open.

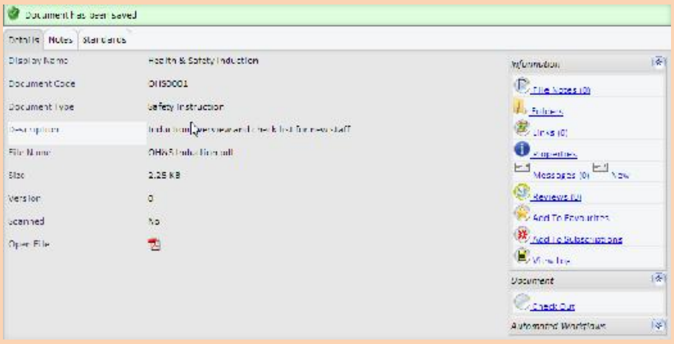
2 Upload the document

1. Click on the *New Document* button to open up the New Document screen.
2. Enter the *Display Name.* This is the name that will be shown in the Document Library. It doesn't have to be the same as the file name.
3. Other details are optional.
4. Click on the *Choose File* button and browse your system for the file and click Open.
5. Click on *Save* to start uploading your document.



3 View document

1. Once the document has been uploaded you will see the standard *Document Details* screen which contains the document's metadata.
2. To view the document, click on the icon next to where it says open file.
3. The document will be downloaded to your computer and if you have a program that can display the file you can view it.



4 Check out to edit the document

1. Because Workflow Connect is a document management system, you have to *Check Out* a document to ensure that only a single person can edit a document or its metadata at a time.
2. Once you are finished editing the document or its metadata check it back in.

Note: See additional help on updating documents for more information.