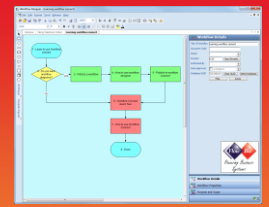




Connecting People, Process
Information & Data

Workflow Designer Quick Start



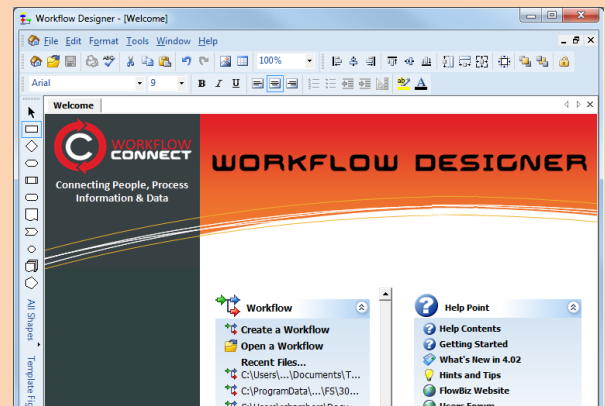
Workflow Designer 4.1
Revision 1.0

Workflow Designer is a workflow and process charting tool that not only lets you easily create workflows, it allows you to add in documentations and link to files. Furthermore you can share your workflows and documents online with Workflow Connect.

1 First you will need to download the **FREE Workflow Designer Desktop tool.**
www.workflowconnect.com/download



2 Create a new workflow diagram. From the Welcome screen click on *Create a Workflow*.



3 Fill in workflow Details in the Information Pane on the right hand side of the screen. The most important information to include is the *Title of Workflow*.

Workflow Details

Title Of Workflow: Form Processing

Document Code: [Empty]

Status: [Dropdown]

Revision: 0.50 [New Revision]

Authorised By: [Empty]

Date Approved: 5/04/2012 [Dropdown]

Database GUID: [Empty] [Clear GUID] [Select Database]

[Files] [Jumps]

4 You can further document your workflow by clicking on *Purpose and Scope* at the bottom of the Information Pane. You can enter information about the purpose, scope and business analysis for the workflow.

Purpose and Scope

To make sure that telephone orders are taken correctly.

[Expand] [Insert From File]

All Telephone Orders at Designer Blogs.

[Expand] [Insert From File]

Business Analysis

[Expand] [Insert From File]

[Workflow Details] [Workflow Properties] [Purpose and Scope]

5 Add workflow steps with the QuikDraw Palette

1. Click on a step and then click on the process shape in the QuikDraw Palette
2. Click on the Down arrow in the QuikDraw Palette
3. A new process step will appear below the previous step

6 Add details to each step by clicking on a step shape to bring up the Step Details panel.

7 Add additional paths to your workflow

8 You can change the way lines look, including adding captions by clicking on a line

9 Upload the workflow to Workflow Connect by going to File | Publish

10 Use the Document Library and Workflow Explorer to view your workflow and documents