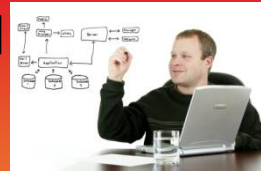




Connecting People, Process  
Information & Data

# Workflow Connect: Get Started

## Upload Workflows



Workflow Connect  
Workflow Designer  
Revision 2.0

You create Workflows in the free desktop tool Workflow Designer then you can upload them to Workflow Connect so that you can share them with others and provide an interactive work reference accessible to anyone with an Internet Connection.

### 1 Create a Workflow

1. Unless advised otherwise, you will need to get Workflow Designer to create a workflow.
2. Use Workflow Designer to create a workflow.
3. You will need to save it your local computer before you start the upload process.
4. To start the upload process, go to the File menu and choose Publish.
5. In the Publish Options, where it says Database to Publish Workflow Into click the **Select** button.

The 'Publish Options' dialog box contains the following elements:

- Generate Reports (with a 'Configure' button)
- Database to Publish Workflow into: [(Select Database)] (with a 'Select' button)
- Folder to Publish Workflow into: [(Full Path to Publish Folder)] (with a 'Select' button)
- Overwrite Existing Workflow
- DMS Template: [(No Template)] (with a dropdown arrow)
- Buttons: 'Cancel' and 'Submit'

### 2 Login to the database

You can publish to Workflow Connect from Workflow Designer using your Workflow Connect username and password.

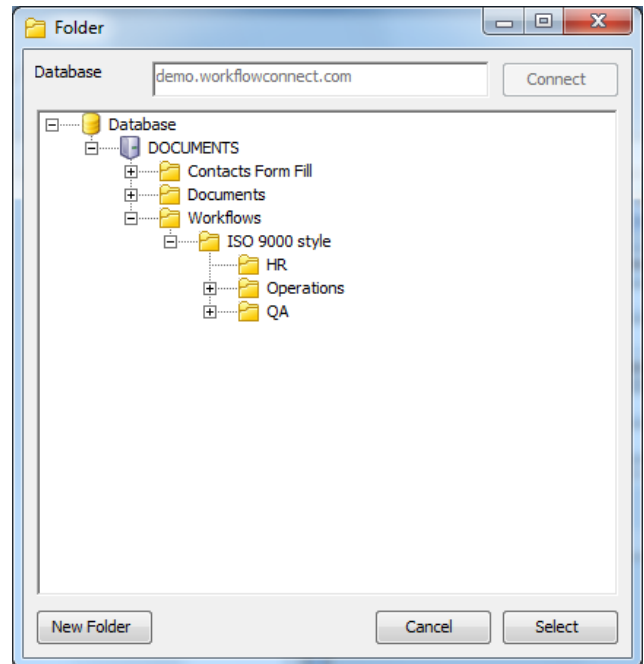
1. You will be asked to login.
  - The server name is demo.workflowconnect.com/
  - Login Name is the log in you have been provided
  - Password is the password you have been provided
2. Press Options >>>
  - Database is **the name provided to you**
  - **Port** can be left blank
    - **Use SSL** must be unchecked
    - **Proxy Settings** must be on No Proxy unless advised otherwise.

The 'FlowBiz Webservice Logon' dialog box contains the following elements:

- Workflow Connect Webservice Logon (Version 5.13.863)
- Logos for FlowBiz technology Platform and Workflow Connect
- Server: demo.workflowconnect.com (dropdown)
- Login Name: admin
- Password: \*\*\*\*\*
- Database: saturn
- Port: (empty)
- Use SSL
- Proxy Settings:
  - No Proxy
  - Use Internet Explorer Settings
  - Use Manual Settings (with 'Settings...' button)
- Buttons: 'Options <<', 'Remember Password', 'OK', 'Cancel'

### 3 Select a location in the Workflow Connect database

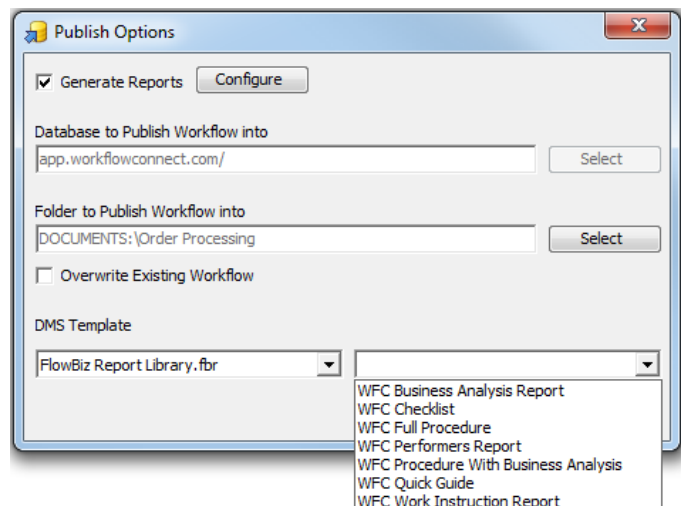
1. Once you are logged in press **Select** opposite the Folder to Publish Workflow Into. You will see a dialog box showing the folder structure in your Workflow Connect Site.
2. Browse through the folder structure by clicking on the + and click on the folder where you want the workflow to be uploaded.
3. Click on the *Select* button.



### 4 Choose a DMS Template

Before we start uploading the Workflow we can configure whether we want any reports to be generated along with the upload. These are the same reports you can generate using *File / Generate Reports* in Workflow Designer, but now they will be available as well in Workflow Connect.

1. The most useful report is the DMS template which will appear in the Document Library as an icon beside the workflow icon.
2. In the drop down box under *DMS Template* select *FlowBiz Report Library.fbr*.
3. In the second drop down box beside this choose the report you want as the DMS Template (WFC Full Procedure is a popular choice).

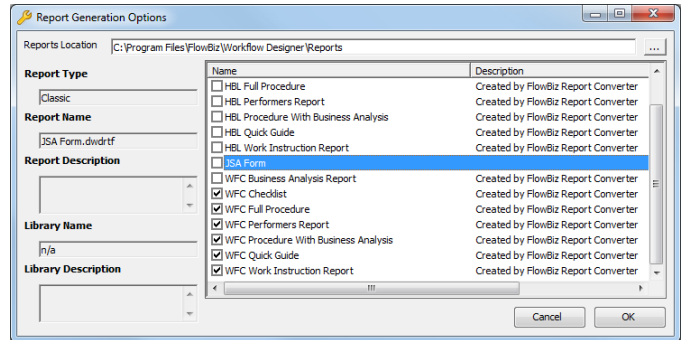


## 5 Select additional reports to generate

In addition to the DMS Template it is also possible to generate reports that will appear in the *Reports* tab in the *Workflow Reference* screen in Workflow Connect.

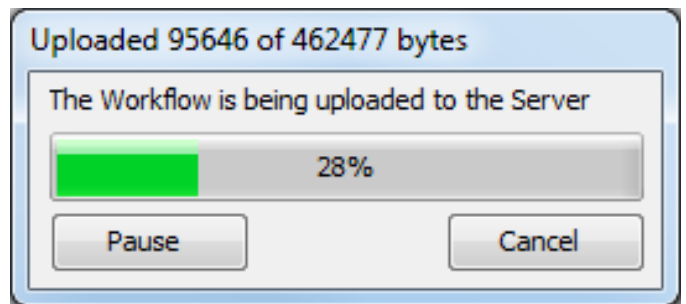
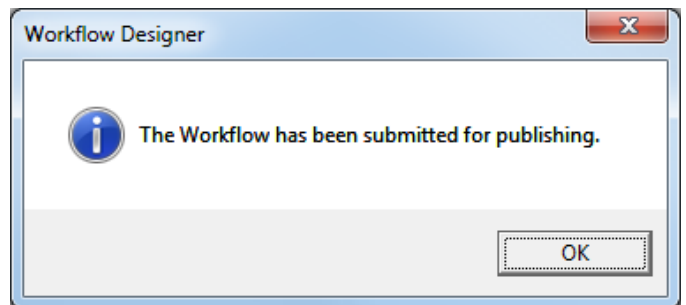
1. Make sure the *Generate Reports* check box is selected and click on the *Configure* button to choose which reports you want generated.

**Note:** If you want the same report to appear in both the Document Library and under the *Reports* tab then you need to select both as the *DMS Template* and under *Generate Reports*.



## 6 Upload

1. To start the upload process click on the *Submit* button. **Note:** If you are overwriting an existing Workflow then make sure that you choose the *Overwrite Existing Workflow* option before you click *Submit*.
2. Processing may take a little bit of time depending on how many reports need to be generated.
3. You will then be prompted by a dialog box saying that *The Workflow has been submitted for publishing*.
4. Click *OK*.
5. A progress bar will come up as the Workflow is uploaded to Workflow Connect.



## 7 Find and view your workflow

Your Workflow is now within Workflow Connect and you can access it in a number of ways.

1. From within Workflow Designer you can open and edit Workflows straight from Workflow Connect. Go to the *File* menu and choose *Open from Database*.
2. From within Workflow Connect you can browse for the workflows either using the *Document Library* or the *Workflow Explorer* and then use them interactively in the *Workflow Reference* screen.
3. From Access Point simply search for the workflow.

