Resource drag & drop in Workflow

Tired of repeating the same instructions over and over again? Well here's a different way of working with Workflow in version 2020.2: tell it *what* you want instead of *how* to do it! It requires a bit of a mind shift, but we think you'll find it more efficient in the end!

Don't tell me what to do!!!

When you need someone or something to perform a task for you, there are essentially two ways of going about it: you can either explain how you want it done (the *how*), or you can express what your end goal is (the *what*). The *how* method requires a bit more time because you have to provide step by step instructions, but then again you're sure to get what you want. The *what* method simply states a goal and is therefore quicker, but it relies on the other party being able to understand that goal and to take whatever action it deems necessary to get there.

For years, you've been telling Workflow *how* to do things with Connect. You *drag&drop tasks* onto processes, which is the equivalent of telling Workflow "Data map this data file!" or "Create a Job!". But still, Workflow can't understand what your end goal is until you provide additional instructions by selecting the proper resource inside each task (e.g. use *this* DM config, or *that* Job Preset).

But what if you could provide those additional instructions *first*? Then you'd simply tell Workflow "Use this DM Config!" or "Use this Print Preset!" and you'd rely on Workflow being able to infer *what* you want to do. And obviously, if you give Workflow a DM Config or a Print Preset, then it should know immediately what your intent is!

Well that's what this new feature is all about: you can now simply *drag&drop resources* onto your process and let Workflow determine what the appropriate course of action is. And don't worry: when in doubt, Workflow asks you a simple confirmation before proceeding.

It's all about saving time

Until now, there has only ever been one way of adding Connect-related tasks to a Workflow process: you select the Connect plugin category from the plugin bar, then drag&drop the appropriate task onto the process. The task automatically opens and you then have to select the correct resource from the list. Finally, you click the OK button to validate the configuration.

With the new Resource Drag&Drop feature, you kind of work in reverse: you select the Connect Resource you want to use at a particular point in a process and you drag&drop it onto the process. Workflow recognizes the

type of resource you just dropped and either creates the appropriate task or, when several types of tasks could use that resource, asks you to pick the one you want. The task then opens up and the resource you just drag&dropped is already selected for you, which usually means all that's left for you to do is to press the OK button.

At first, this may all appear to be a case of *six of one and half a dozen of the other*, but it really isn't. When you start using the feature on a regular basis, you realize you are saving a lot of clicks and - especially if you have **many** Connect resources - a lot of scrolling through lists to find the proper resource once the task is open.

This method of working is also more intuitive because it follows the same logic your brain does when working on a Workflow process. For instance, as you're designing a process, at some point you might think "*this is where I now need to produce my invoice*". It follows naturally that you would drag&drop the Invoice template exactly on that spot in your process: you are instructing Workflow on your *intent* (i.e. "I want *Invoice* content to be created"), whereas the traditional method instructs Workflow on the *how* (i.e. "Get ready to create *some* content, I will then tell you which template to use")

Detailed look
Let's look at how this works for each resource type.

Job Preset
This is the simplest one:

- Drag & drop a job preset from the list of Connect Resources onto your process
  ==> Workflow creates a Create Job task and automatically selects the job preset for you
- Press OK

Data Mapping Configuration
Just as simple, with an added feature:

- Drag & drop a data mapping configuration from the list of Connect Resources onto your process
- Confirm if you want to use the first sample data file in the DM config as your process' sample job file (which, you'll probably find, is often the case). You can instruct Workflow to remember your choice so it won't ask again
  ==> Workflow creates a Data Mapping task and automatically selects the DM config for you
- Press OK

Output Preset
Simple again, but with a couple of choices:

- Drag & drop an output preset from the list of Connect Resources onto your process
- Confirm if you want the Create Output task to be an *Action* or an *Output* task
  ==> Workflow creates a Create Output task and automatically selects the output preset for you
- Press OK

Document Template

Still simple, but with multiple choices:

- Drag & drop a document template from the list of Connect Resources onto your process
- Confirm what type of Content you want to create (you can even specify whether to create web content as an *Action*/*Output* task)
  ==> Workflow creates a Create Content task and automatically selects the document template for you
- Press OK

Notes

Some of you may wonder how to create an *All-In-One* or a *Create Preview PDF* task using this method. Well... You can't. That's because both these tasks require several different types of Connect resources at once and Workflow's drag&drop feature only works with a single resource. Besides, these tasks typically require a bit more configuration, so you would probably not be saving much time anyway.

But we're open to suggestions, so if after using the feature for a while you find that it could use some improvements, be sure to let us know!