

## Documents: Workflows (Moving Old Files)

### What's possible within Documents Workflow?

Within the Documents application, it is possible to create workflow rules to setup any of the following:

- Create states for documents, such as *Awaiting Approval* and *Approved*.
- Set the transitions between states to be manual, automatic based on one or multiple approvals, or automatic based on a time having elapsed or a date having been reached.
- Specify exactly who should have to approve documents
- Request feedback from approving users as the documents move through the workflow
- Move the document to a specified folder as the document moves between states
- Specify 'workflow managers'. Documents can be set to Read-Only except for these users.
- Send notifications of changes to Workflow managers and document owners.

An unlimited number of workflows can be created, and workflows are applied to folders so that any newly uploaded items must go through your specified workflow process.

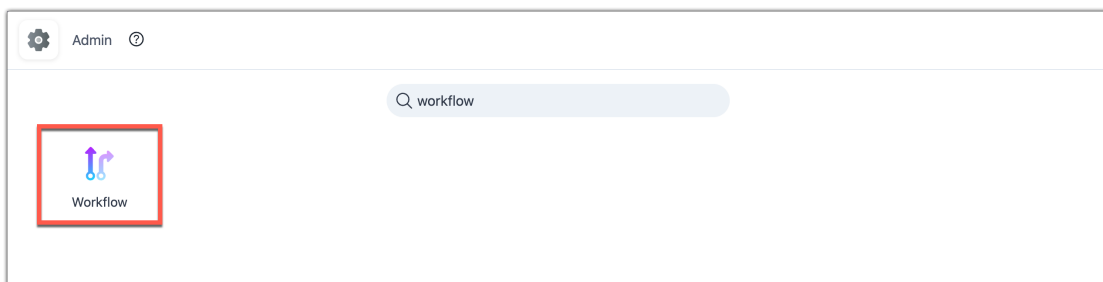
It is recommended that a user is an application administrator of both the Workflow and Documents application so they can follow the steps below.

### Example Workflow 2: Moving old documents

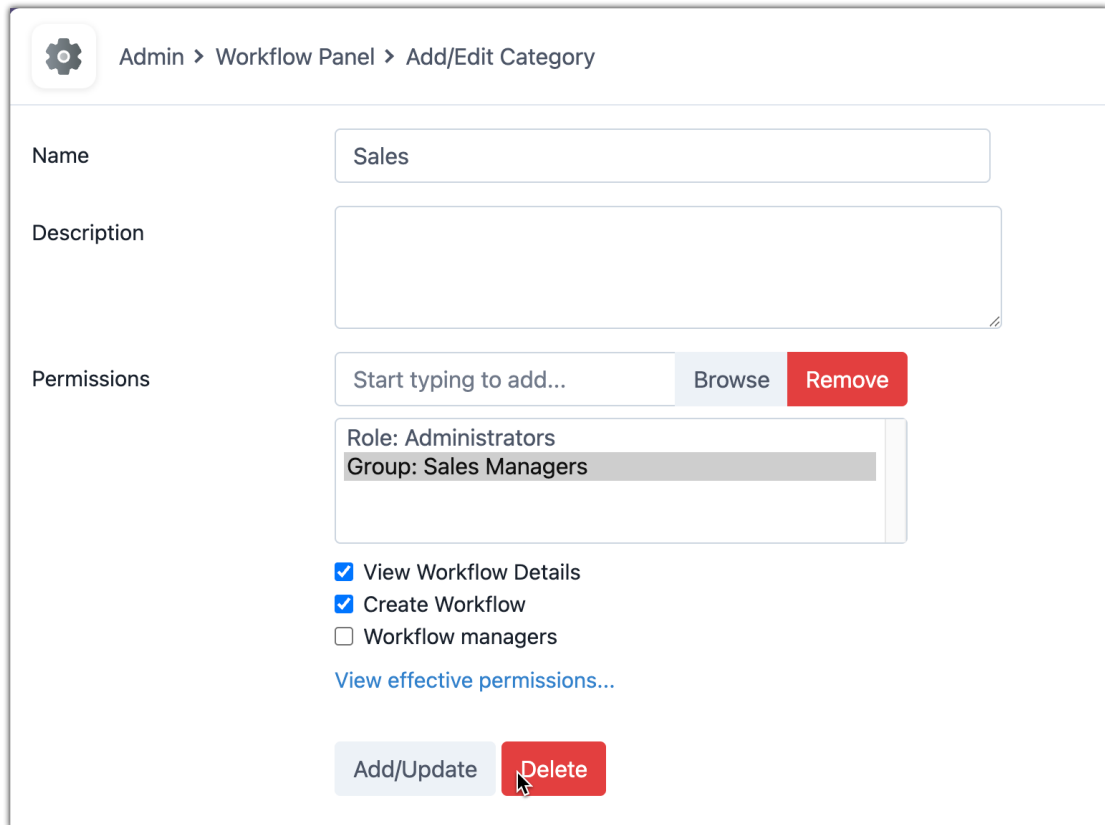
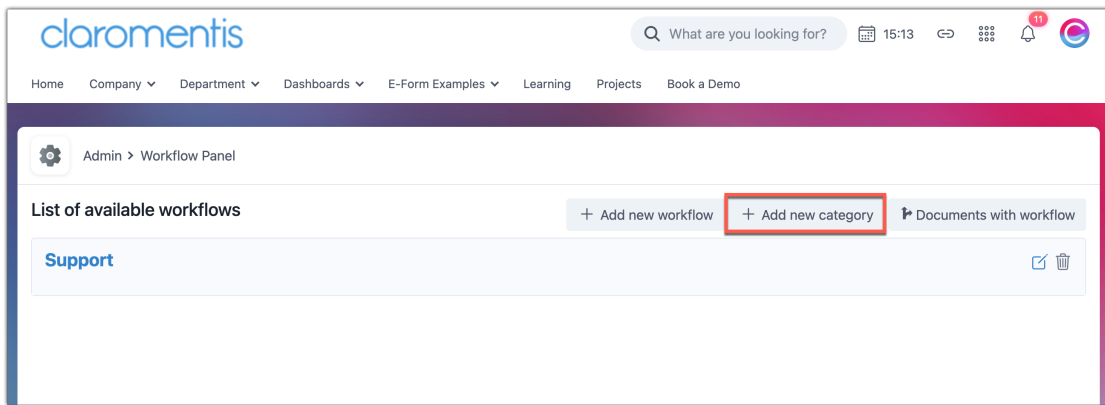
Scenario: I want any documents within my 'Recent Sales Documents' folder to automatically move into my 'Old Sales Documents' folder after six months.

#### Steps

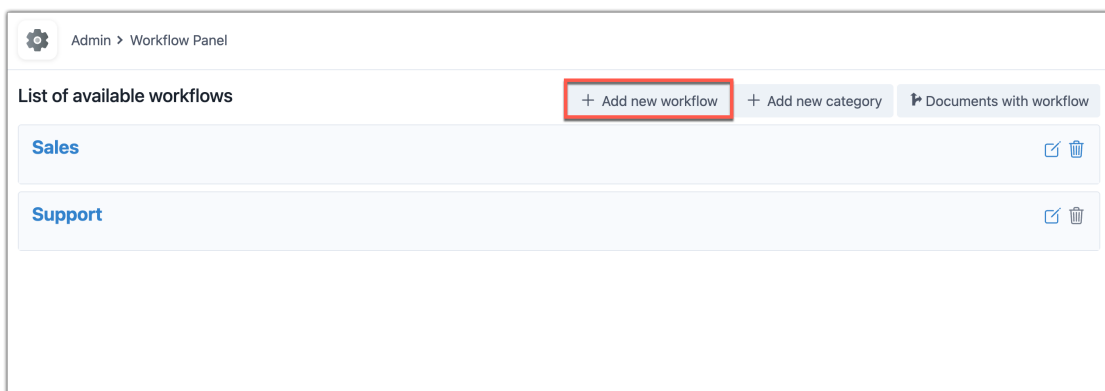
1. Head to Admin > Workflow. If you don't see Workflow, you will need to ensure you are set as an [application administrator](#) for it by a [sysadmin](#) first.




2. Click 'Add New Category'. Create a category called 'Sales' and assign 'Create Workflow' to a user [Role](#) or [Group](#) responsible for edits to the workflow itself, e.g. the group 'Sales Managers' in this example.



3. Click 'Add/update' to save. Now click 'Add New Workflow'. Add it into the category you have created, and call it 'Move out documents older than 6 months'.




Admin > Workflow Panel > Workflow Diagram

## Add new workflow

Category
Sales

Workflow Name
Move out files older than 6 months

Description


Copy workflow from
-- None --

Add/Update

4. Click 'Add/Update' to save. Scroll down. Now create the two states, one for 'Recent Document' and the other 'Older Document', picking colours to match, such as green and grey. Click 'Save' to apply changes.

Your browser doesn't support video.  
Please download the file [video/mp4](#)

5. On the 'Recent Document' line of the table containing the two states, click the pencil on the right to edit the action.


Admin > Workflow Panel > Workflow Diagram

## Edit workflow

Category
Sales

Workflow Name
Move out files older than 6 months

Description



Permissions
☒ Inherit rights from parent folder

Start typing to add...
Browse
Remove

Group: Sales Managers  
Role: Administrators

☒ View Workflow Details  
☐ Workflow managers  
[View effective permissions...](#)

Add/Update
Delete

Recent document	Action: None	
Older document	Action: None	

Add new state

State name

Colour
#FFFFFF
Pick a colour

6. Under 'Transition', set the next state to 'Older Document', set the transition type to 'On Time Elapse', and set it to 180 days. Click 'save transitions' and then 'Add/Update' to save the changes you have made to the workflow.

☐ Make document read only
 ☐ Make document read only except for workflow managers
 ☐ Notify document owner

Action
 

None

Transition
 

Next state
 

Older document

Transition type
 

On Time Elapse

180 Day
 00 Hour
 00 Minute

Save transitions

Add/Update
 Delete

7. On the 'Older Document' line of the table containing the two states, click the pencil on the right to edit the action.

Admin > Workflow Panel > Workflow Diagram

Edit workflow
 

Category
 

Sales

Workflow Name
 

Move out files older than 6 months

Description

Permissions
 

☒ Inherit rights from parent folder
 

Start typing to add...
 Browse
 Remove

Group: Sales Managers
 Role: Administrators

☒ View Workflow Details
 ☐ Workflow managers
 [View effective permissions...](#)

Add/Update
 Delete

Recent document	Action: None	
Older document	Action: None	

Add new state
 

State name

Colour
 

#FFFFFF

Pick a colour

8. Set the Action to be 'Move to a folder'. Click 'Choose folder' and select the 'Old Sales Documents' folder.

☐ Make document read only except for workflow managers
 ☐ Notify document owner

Action
 

Move to a folder

Old Sales Documents
 Choose folder

Transition
 

Next state
 

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Transition type
 

Manual

Save transitions

Add/Update
 Delete

9. Click Add/Update to save the changes you have made to the workflow.

The screenshot shows a workflow configuration interface. At the top, there are checkboxes for 'View Workflow Details' (checked) and 'Workflow managers' (unchecked), along with a link 'View effective permissions...'. Below this are two buttons: 'Add/Update' (highlighted in blue) and 'Delete' (red). A table below the buttons has two rows: 'Recent document' with a yellow square icon and 'Older document' with a yellow downward arrow icon. To the right of the table, there are two 'Action' fields: 'Action: None' and 'Action: Move to a folder' (highlighted with a red box). Below the table is a section 'Add new state' with a 'State name' input field.

10. Head to the admin side of Documents (Admin > Documents > Manage Documents List). If you don't see Documents on the admin side, you will need to ensure you are set as an application administrator for it by a [sysadmin](#).

11. Find the folder you wish to apply this workflow to, in this example 'Recent Sales Documents'. Edit its properties.

The screenshot shows the Claromentis admin interface. The top navigation bar includes a search bar, a clock showing 11:44, and several icons. The left sidebar contains a 'CONFIGURATION' section with links to 'General configuration', 'Metadata', 'Record types', 'Templates', and 'Google authentication'. The main content area shows a list of folders under the 'Root' directory. The 'Recent Sales Documents' folder is selected, and a context menu is open over it with options 'Edit properties' and 'View/edit permissions'.

12. Select the workflow 'Move out documents older than 6 months', and click 'Update Folder Properties' to save. The workflow has now been set up.

The screenshot shows the 'Edit folder properties' form for the 'Recent Sales Documents' folder. The form has a 'Parent folder' field set to 'Sales'. The 'Name' field is 'Recent Sales Documents'. The 'Workflow' field is set to 'Move out files older than 6 months :: Claromentis Administrator' (highlighted with a red box). The 'Document is searchable' and 'Display documents in "What's New" list' fields are both set to 'Inherit from parent (On)'. The 'Owner' field is set to 'Claromentis Administrator' with a 'Browse' button. The 'Description' field is empty. At the bottom, there is a checkbox for 'Inherit' (checked) and a blue 'Update Folder Properties' button (highlighted with a red box). On the right side, there are links for 'Edit Permissions', 'Delete', and 'Close folder'.

### 13. Test the functionality

Add a document to the 'Recent Sales documents' folder, and after 180 days have passed, confirm that it has been moved into the 'Old Sales documents' folder.

(Reduce the time frame in the transition to one or a few days when testing, so you do not have to wait 180, then change this back once confirmed as working)

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Tags: [approval](#), [document](#), [file](#), [workflow](#)