



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.

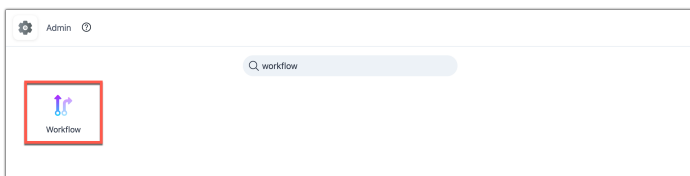
It is recommended that a user is an application administrator of both the Workflow and Documents application so they can follow the steps below.

Example Workflow 2: Moving old documents

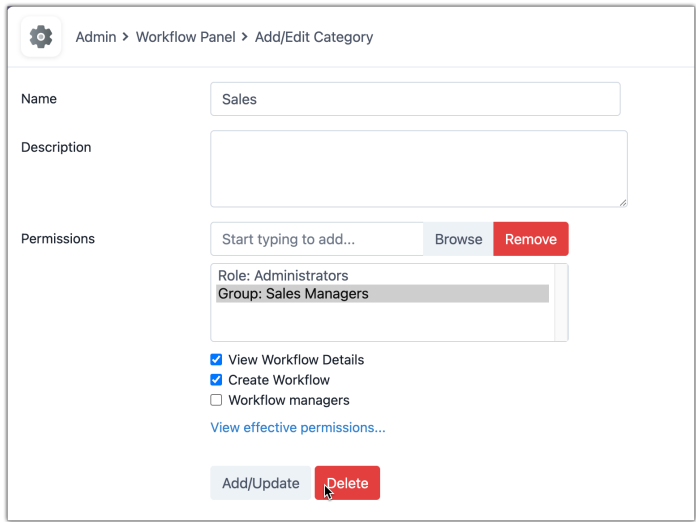
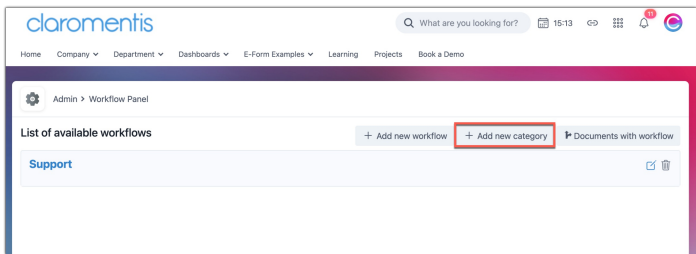
Scenario: I want any documents within my 'Recent Sales Documents' folder to automatically move into my 'Old Sales Documents' folder after six months.

Steps

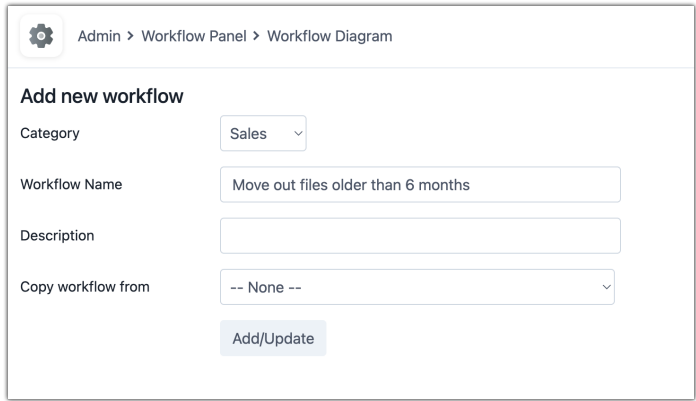
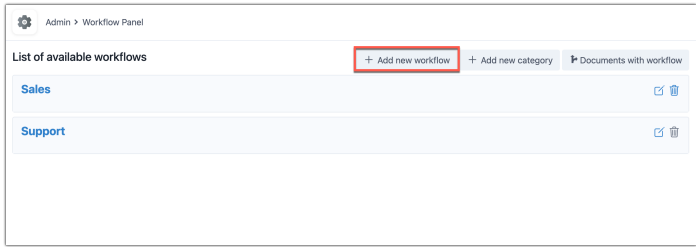
1. Head to Admin > Workflow. If you don't see Workflow, you will need to ensure you are set as an [application administrator](#) for it by a [sysadmin](#) first.



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'.



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.



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...
- Group: Sales Managers
Role: Administrators
- ☐ View Workflow Details
- ☐ Workflow managers
- [View effective permissions...](#)

Recent document	Action: None	<input type="button" value="✎"/>
Older document	Action: None	<input type="button" value="✎"/>

Add new state

State name:

Colour: #FFFFFF

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

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...
- Group: Sales Managers
Role: Administrators
- ☐ View Workflow Details
- ☐ Workflow managers
- [View effective permissions...](#)

Recent document	Action: None	<input type="button" value="✎"/>
Older document	Action: None	<input type="button" value="✎"/>

Add new state

State name:

Colour: #FFFFFF

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

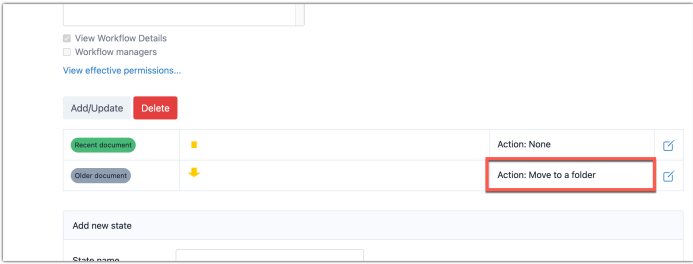
Old Sales Documents

Transition

Next state: ----

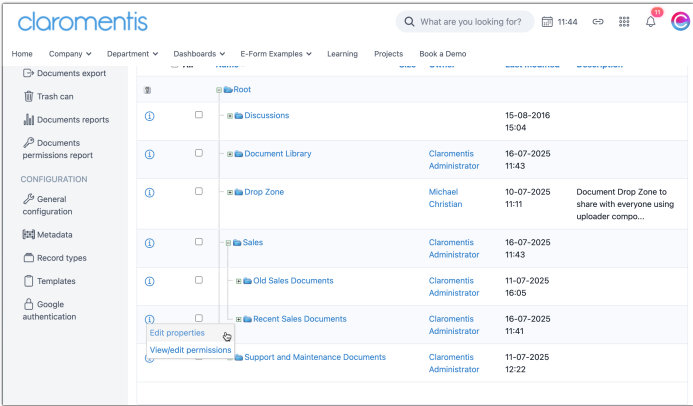
Transition type: Manual

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

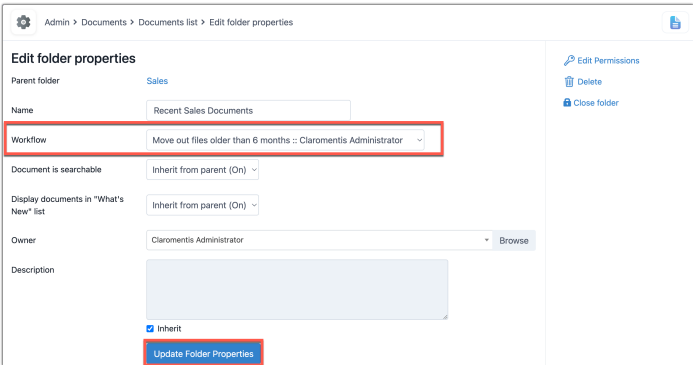


10. Head to the admin side of Documents (Admin > Documents > Manage Documents List). If you don't see Documents on the admin side, you will need to ensure you are set as an application administrator for it by a [sysadmin](#).

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



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.



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)