



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.

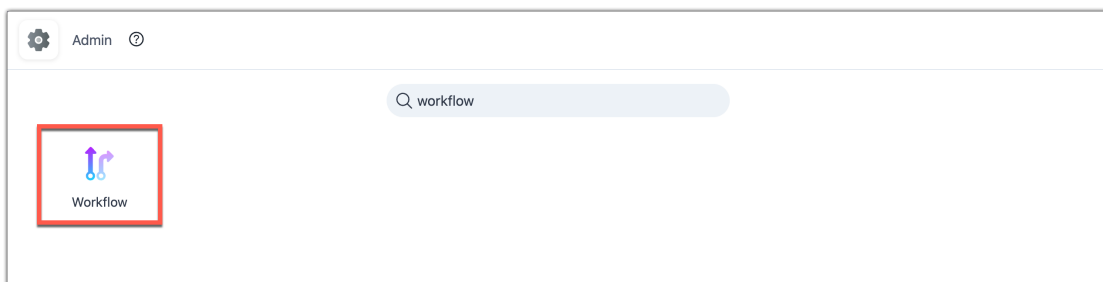
It is recommended that a user is an application administrator of both the Workflow and Documents application so they can follow the steps below.

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.

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Home Company Department Dashboards E-Form Examples Learning Projects Book a Demo

Admin > Workflow Panel

List of available workflows

+ Add new workflow + Add new category Documents with workflow

Support

Admin > Workflow Panel > Add/Edit Category

Name Sales

Description

Permissions

Start typing to add... Browse Remove

Role: Administrators
Group: Sales Managers

☒ View Workflow Details
☒ Create Workflow
☐ Workflow managers

[View effective permissions...](#)

Add/Update Delete

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

List of available workflows

+ Add new workflow + Add new category Documents with workflow

Sales

Support


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.

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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	<div></div>
Older document	Action: None	<div></div>

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

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 contains two rows: 'Recent document' with a yellow square icon and 'Action: None', and 'Older document' with a yellow downward arrow icon and 'Action: Move to a folder' (this row is highlighted with a red border). At the bottom, there 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 'Home', 'Company', 'Department', 'Dashboards', 'E-Form Examples', 'Learning', 'Projects', and 'Book a Demo'. The left sidebar has 'Documents export', 'Trash can', 'Documents reports', 'Documents permissions report', and a 'CONFIGURATION' section with 'General configuration', 'Metadata', 'Record types', 'Templates', and 'Google authentication'. The main content area shows a tree view of folders: 'Root', 'Discussions', 'Document Library', 'Drop Zone', 'Sales', 'Old Sales Documents', 'Recent Sales Documents' (selected), and 'Support and Maintenance Documents'. A context menu is open over 'Recent Sales Documents' 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 'Parent folder' is 'Sales'. The 'Name' field contains 'Recent Sales Documents'. The 'Workflow' dropdown is set to 'Move out files older than 6 months :: Claromentis Administrator' (this row is highlighted with a red border). The 'Document is searchable' and 'Display documents in "What's New" list' dropdowns are both set to 'Inherit from parent (On)'. The 'Owner' is 'Claromentis Administrator' with a 'Browse' button. The 'Description' field is empty. At the bottom, the 'Inherit' checkbox is checked, and the 'Update Folder Properties' button is highlighted with a red border. 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](#)