

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.

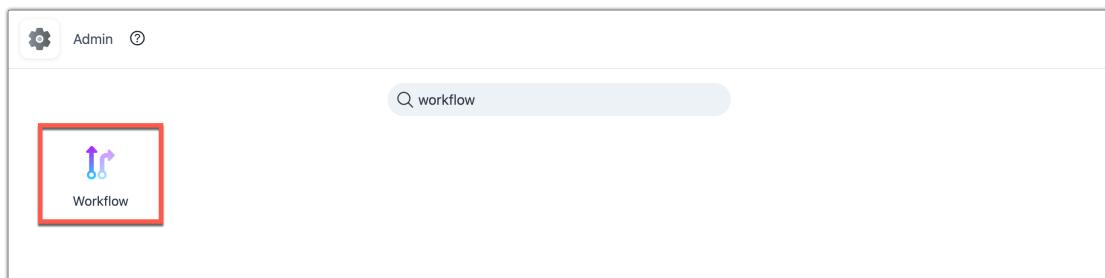
It is recommended that a user is an application administrator of both the Workflow and Documents application so they can follow the steps below.

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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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...  

Role: Administrators
Group: Sales Managers

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

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.

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	<input checked="" type="checkbox"/> Inherit rights from parent folder <input type="text"/> Start typing to add... Browse Remove Group: Sales Managers Role: Administrators						
<input type="checkbox"/> View Workflow Details <input type="checkbox"/> Workflow managers View effective permissions...							
Add/Update Delete							
<table border="1"> <tr> <td>Recent document</td> <td>Action: None</td> <td></td> </tr> <tr> <td>Older document</td> <td>Action: None</td> <td></td> </tr> </table>		Recent document	Action: None		Older document	Action: None	
Recent document	Action: None						
Older document	Action: None						
Add new state							
State name	<input type="text"/>						
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

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	<input type="checkbox"/>
Older document	Action: None	<input checked="" type="checkbox"/>

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 Choose folder

Transition

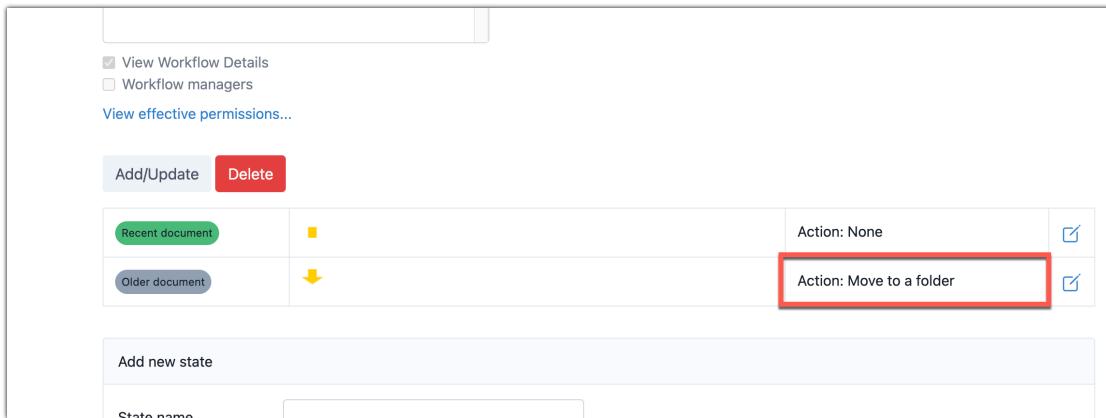
Next state: ----

Transition type: Manual

Save transitions

Add/Update Delete

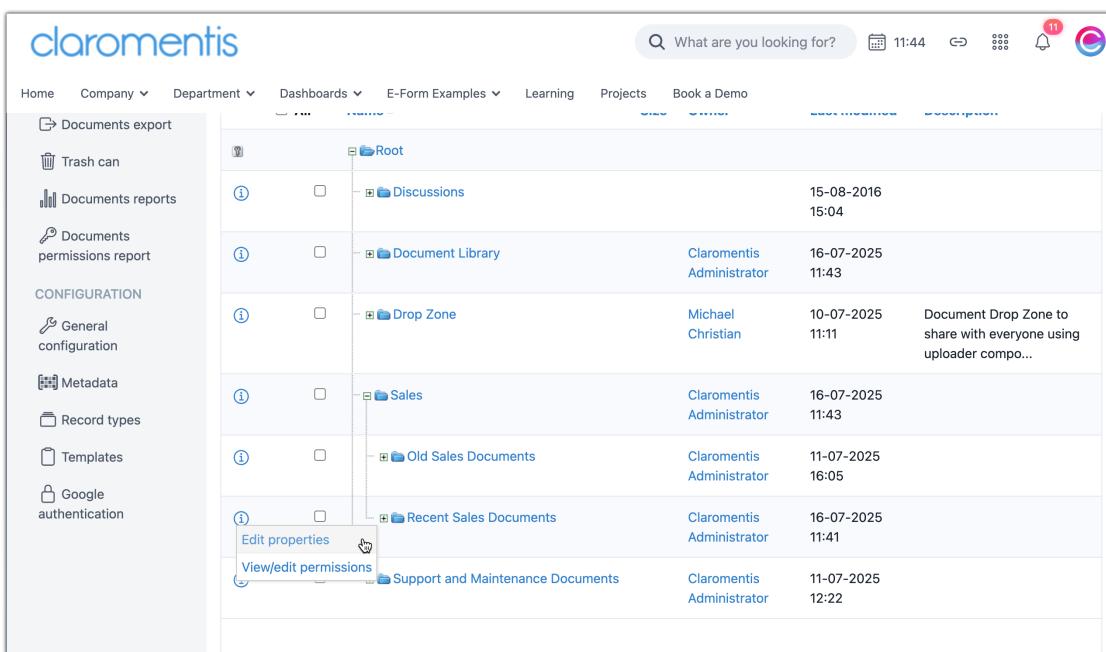
9. Click Add/Update to save the changes you have made to the workflow.



Workflow editor interface showing a state transition table. The 'Older document' state has an 'Action: Move to a folder' transition highlighted with a red box. The 'Recent document' state has an 'Action: None' transition.

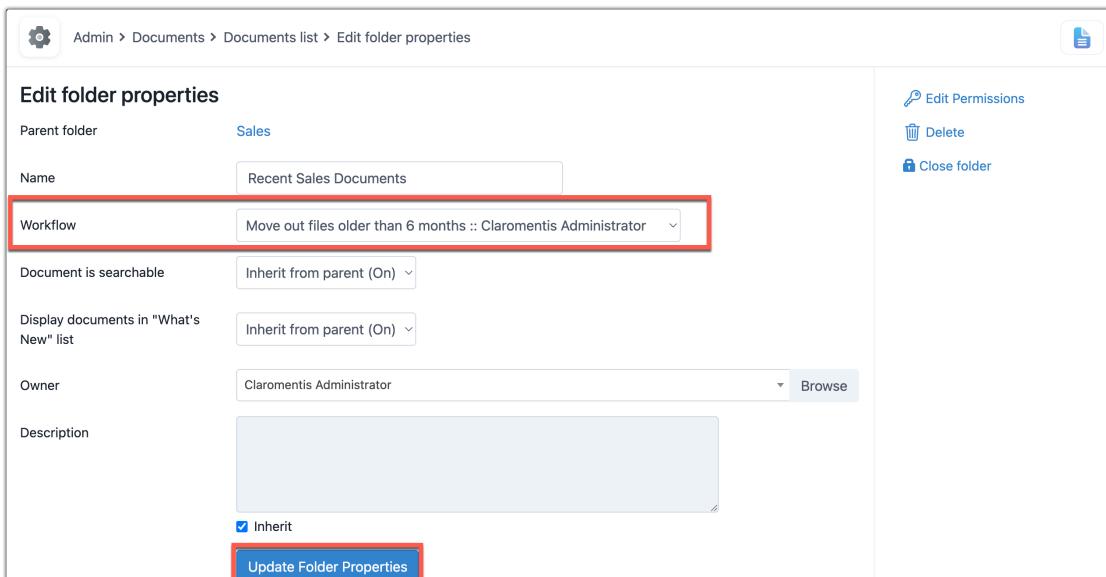
10. Head to the admin side of Documents (Admin > Documents > Manage Documents List). If you don't see Documents on the admin side, you will need to ensure you are set as an application administrator for it by a sysadmin.

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



Claromentis document management interface showing the 'Recent Sales Documents' folder in the 'Sales' folder. The 'Edit properties' button is highlighted with a cursor.

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.



Edit folder properties dialog for the 'Recent Sales Documents' folder. The 'Workflow' dropdown is highlighted with a red box and set to 'Move out files older than 6 months :: Claromentis Administrator'. The 'Update Folder Properties' button is highlighted with a red box at the bottom.

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](#)