

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 userRole 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 P Documents with workflow
Support	 C 11
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 Vorkflow Vork
	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'.

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Sales				ď
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Admin > Workflo	ow Panel > Workflow Di	agram		
Add new workflow				
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Add new workflow Category Workflow Name	Sales ~ Move out files old	ler than 6 month	15	
Add new workflow Category Workflow Name Description	Sales v Move out files old	ler than 6 month	ıs	
Add new workflow Category Workflow Name Description Copy workflow from	Sales v Move out files old	ler than 6 month	15	~

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 th	ne table	containing	the two	states.	click the	pencil	on the	right to	edit th	e action.
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Admin > Workflor	v 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	
	Oroun: Sales Manages Role: Administrators	
	View Workflow Details	
	View effective permissions	
	Add/Update Delete	
	Recent document Action: None	ď
	Glder document Action: None	ø
	Add new state	
	State name	
	Colour #FFFFF	

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.

Action	Nake document read only Make document read only workflow managers Notify document owner
	Transition
	Next state Older document ~
	Transition type On Time Elapse V
	180 Day 00 Hour 00 Minute
	Save transitions
	Add/Update Detete

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

Admin > Work	flow Panel > Workflow Diagram	
Edit workflow Category	Sales ~	
Workflow Name	Move out files older than 6 months	
Description		
Permissions	Therit rights from parent folder Start typing to add Browse	
	(Recent document) Action: I	None
	Older document Action: I	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 of a second sec	nly except for workflow managers
	 Notify document owner 	
Action	Move to a folder v	
	Old Sales Documents	Choose folder
	Transition	
	Next state	v
	Transition type	Manual ~
		Save transitions
	Add/Update Delete	

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

	View Workflow Details Workflow managers				
Vie	ew effective permissions				
,	Add/Update Delete				
(Recent document	•		Action: None	ď
(Older document	+		Action: Move to a folder	Ø
	Add new state				
	State name				

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.

Edit folder properties		🔑 Edit Permissions
arent folder	Sales	Delete
lame	Recent Sales Documents	Close folder
Vorkflow	Move out files older than 6 months :: Claromentis Administrator $\qquad \checkmark$	
Document is searchable	Inherit from parent (On) ~	
Display documents in "What's New" list	Inherit from parent (On) $ \sim $	
Dwner	Claromentis Administrator * Brow	wse
Description		

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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