

Auto Archive Documents

Process Automation



About this automation:

Automatically move Filed and Draft Filed documents that were created in your preferred time frame to Archived State and View.



Simply import the sample automation, customise to suit your practice, test and activate!

The screenshot shows a 'Documents' interface with a table of documents and a 'Bulk Update' modal. The table has columns for Type, Name, and Client. The modal allows selecting various attributes for a bulk update.

Type	Name	Client
<input type="checkbox"/>	New Business Financials	Marshall, Julia Loui
<input type="checkbox"/>	Engagement Letter	Marshall, Julia Loui
<input type="checkbox"/>	Notice	

Bulk Update

Client	No client selected
Cabinet	Select cabinet
Filing	No filing status selected
Owner	Filed
Workflow Status	Draft
Delete	Archived

What's included:

- ✓ Automation Process Steps

FYI: Auto-Archive Documents
Automatically archive documents based on their created date.

The screenshot shows the configuration page for the 'FYI: Auto-Archive Documents' automation. It includes fields for Name, Description, Trigger (Schedule), Filter (Document - View Filters), Owner (Liz Hurst), Start From (13/09/2024), and Inherit Job (checked). The Next Run is set for Tuesday, 24 September 2024 03:00. A table at the bottom shows the automation step: 'FYI Actions' with the action 'Alter Document'.

Step	Application	Action
1	FYI Actions	Alter Document <ul style="list-style-type: none">Trigger Document will be filed as "[TriggerDocumentFileName] - ARCHIVED" in the cabinet

How to import:

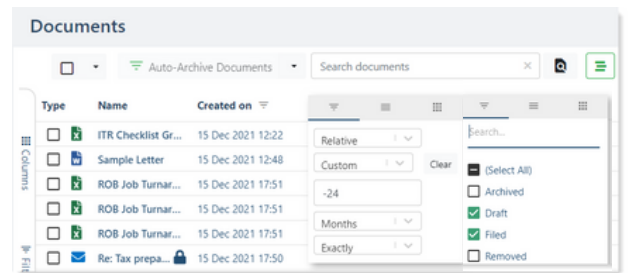
Before you begin, ensure your View has been saved in **Documents** with the following filters:

"Auto-Archive" View

Created Date = Relative Filter,

Custom: -24 months exactly

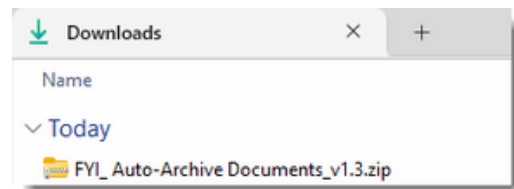
Filing Status = Filed and Draft Filed



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.

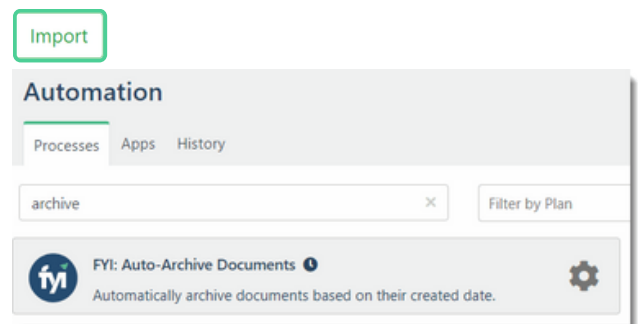


Step 2 - Import the files into FYI

Navigate to the **Automations** screen and click the **Import** button on the right-hand side of the screen.

Locate and select your saved "Auto-Archive Documents" file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



Step 3 - Review the process

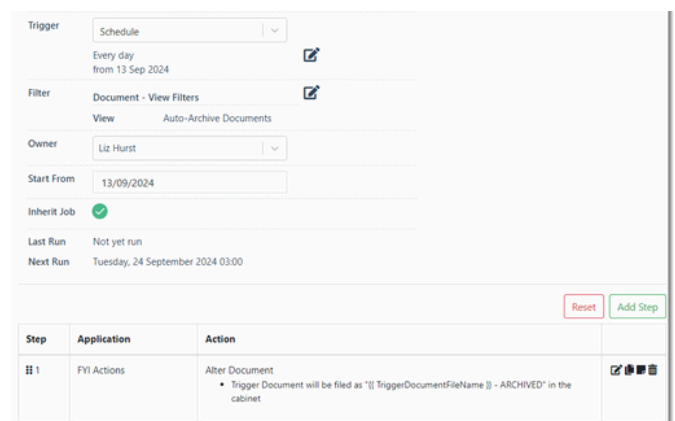
Processes are imported with the **Status** set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

This process uses the **Auto-Archive** View which is the custom view you created in the Documents workspace.

- Review the schedule
- Review the process owner
- Review the process step "Alter Document", more details [here](#).

Note: This process also appends 'ARCHIVED' to the document name.



Step 4 - Test and activate

Click the **Test** button to display a list of documents.

Search and select a specific document to run the test for and select **Run Test**.

Go to the Document Workspace and change your view to the **Archived** document view and review the altered document.

When ready, set the **Status** to Active:

- This automation is set to run automatically every day from the commencement date.
- This automation will run once per document only.

