

# Auto-Archive Documents



## 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!

Documents

Auto-Archive Documents

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.

Details History Activity

Status: **ACTIVE**

Name: FYI: Auto-Archive Documents

Description: Automatically archive documents based on their created date.

Trigger: Schedule  
Every day from 13 Sep 2024

Filter: Document - View Filters  
View: Auto-Archive Documents

Owner: Liz Hurst

Start From: 13/09/2024

Inherit Job:

Last Run: Not yet run  
Next Run: Tuesday, 24 September 2024 03:00

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

## How to import:

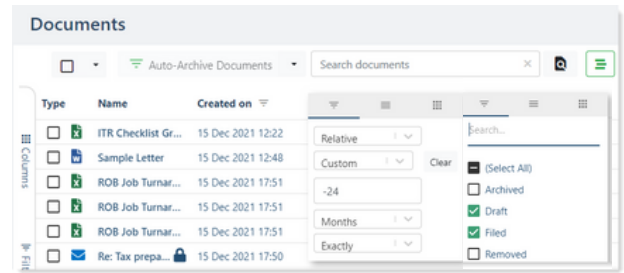
Before you begin, ensure your View has been saved in **Documents** with the following filters:

"Auto-Archive" View

**Created Date** = Relative Filter,

Custom: -24 months exactly

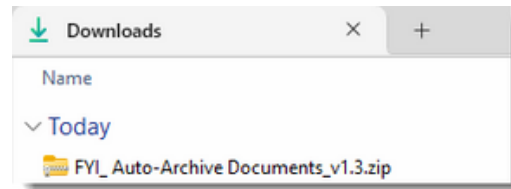
**Filing Status** = Filed and Draft Filed



### 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.

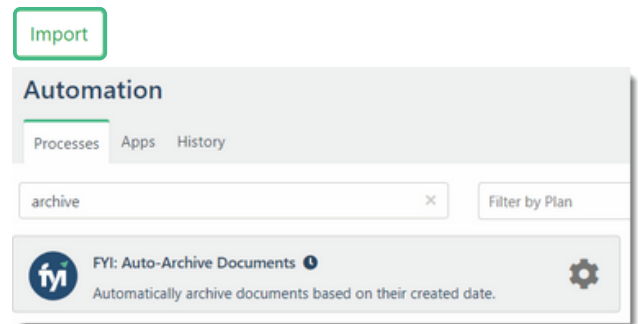


### Step 2 - Import the files into FYI

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

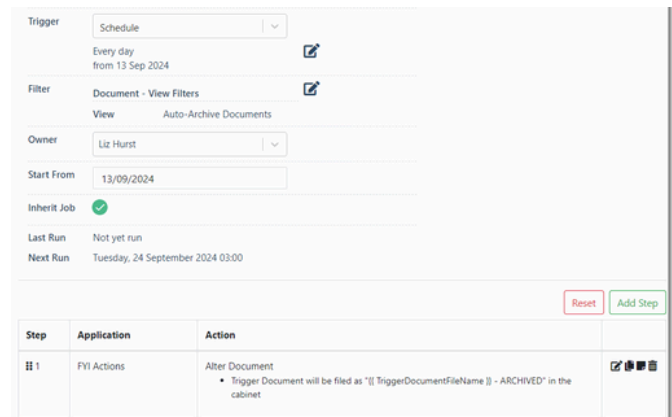
Processes are imported with the **Status** set to Draft.

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.

