

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
	New Business Financials	Marshall, Julia Loui
	Engagement Letter	Marshall, Julia Loui
	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.

FYI: Auto-Archive Documents

Status: ACTIVE

Name: FYI: Auto-Archive Documents

Description: Automatically archive documents based on their created date.

Trigger: Schedule
Every day from 15 Dec 2023

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

Owner: Cathy Woods

Start From: 15/12/2023

Inherit Job:

Last Run: Not yet run
Next Run: Saturday, 16 December 2023 03:00

Step	Application	Action
1	FYI Actions	Alter Document • Trigger Document will be filed as "[OriginalFileName] - ARCHIVED" in the cabinet

How to import:

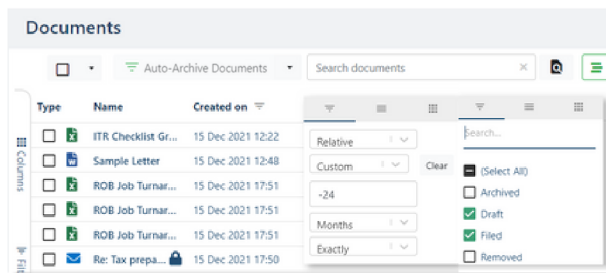
Before you begin, ensure your View has been saved in **Documents** with the following filters:

"Auto-Archive" View

Created Date = Relative Filter,

Custom: -24 months exactly

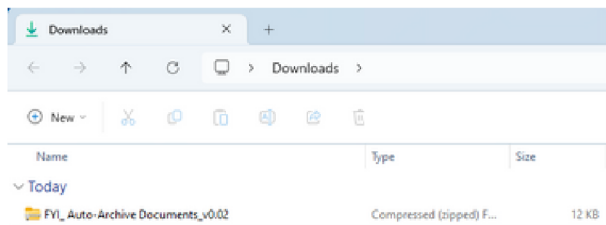
Filing Status = Filed and Draft Filed



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.

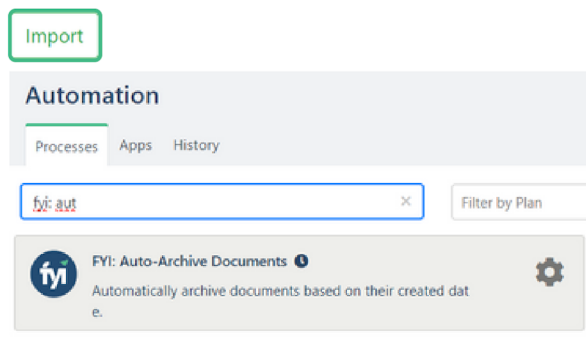


Step 2 - Import the files into FYI

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

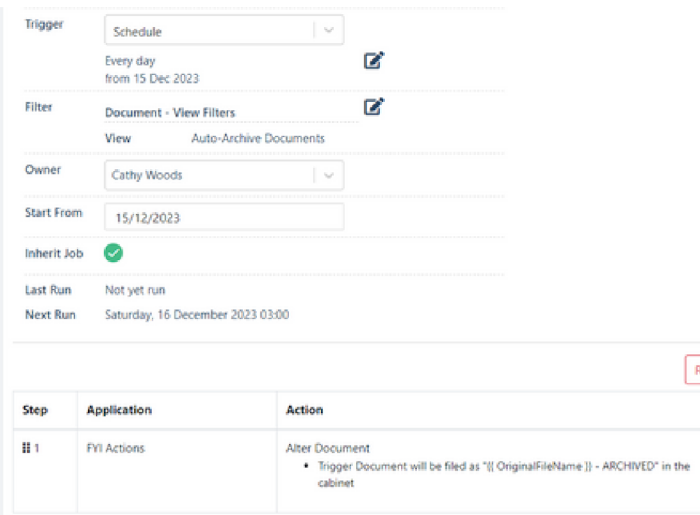
Processes are imported with the **Status** set to Draft.

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.

