

# Auto Delete Documents

## Process Automation



### About this automation:

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

Note: This process does not permanently delete the document, the documents can be recovered from the Deleted document view.



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

The 'Documents' interface shows a table with columns: Type, Name, and Client. The table contains two rows: 'New Business Financials' and 'Engagement Letter', both associated with 'Marshall, Julia Loui'. A 'Bulk Update' modal is open, showing fields for Client, Cabinet, Filing, Owner, Workflow Status, and Delete. The 'Delete' field has a green checkmark.

Type	Name	Client
	New Business Financials	Marshall, Julia Loui
	Engagement Letter	Marshall, Julia Loui

**Bulk Update**

Client

No client selected

Cabinet

Select cabinet

Filing

No filing status selected

Owner

No owner selected

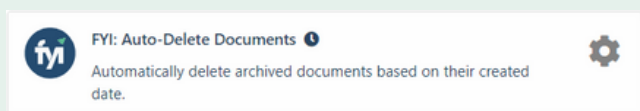
Workflow Status

No status selected

Delete

### What's included:

- ✓ Automation Process Steps



The 'Details' tab shows the configuration for the 'FYI: Auto-Delete Documents' automation. The status is 'ACTIVE'. The trigger is 'Schedule' (Every day from 13 Sep 2024). The filter is 'Document - View Filters' (Auto-Delete Documents). The owner is 'Liz Hurst'. The start date is '13/09/2024'. The last run was 'Not yet run' and the next run is 'Tuesday, 24 September 2024 03:00'. The steps table shows one step: 'FYI Actions' with the action 'Alter Document' (Trigger Document will be filed as "[TriggerDocumentFileName] - DELETED" in the cabinet).

Details

History

Activity

Status

ACTIVE

Name

FYI: Auto-Delete Documents

Description

Automatically delete archived documents based on their created date.

Trigger

Schedule

Every day from 13 Sep 2024

Filter

Document - View Filters

View

Auto-Delete Documents

Owner

Liz Hurst

Start From

13/09/2024

Inherit Job

—

Last Run

Not yet run

Next Run

Tuesday, 24 September 2024 03:00

Reset

Add Step

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

## How to import:

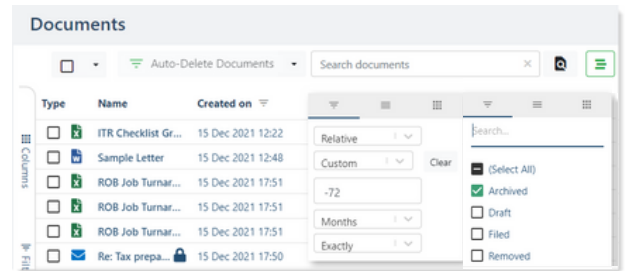
Before you begin, ensure your View has been saved in **Documents** with the following filters:

"Auto-Delete" View

**Created Date** = Relative Filter,

Custom: -72 months exactly

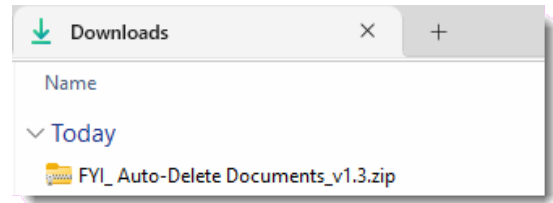
**Filing Status** = Archived



### 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.

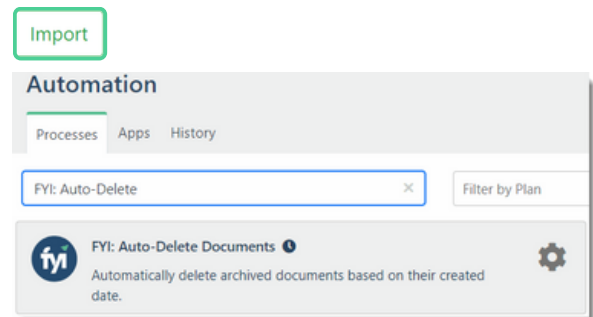


### Step 2 - Import the files into FYI

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

Locate and select your saved "Auto-Delete 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

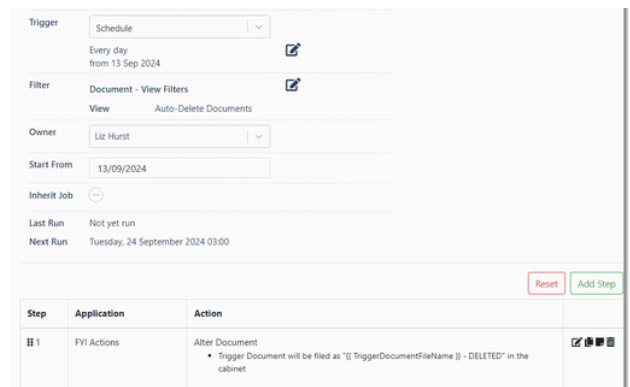
Processes are imported with the **Status** set to Draft.

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

This process uses the **Auto-Delete** 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 'DELETED' 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 **Deleted** 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.

