

Archive Date

When uploading a document to the 'iPost Documents' library contributors are required to stipulate an archive date for their document – the default is 1 year but this can be changed at the time of upload or subsequently.

Information Management Policy

The 'iPost Documents' library has been has an expiration information management policy set as shown in Fig.1 below.

<p>Name and Administrative Description</p> <p>The name and administrative description are shown to list managers when configuring policies on a list or content type.</p>	<p>Name: Document</p> <p>Administrative Description: Run the document archive workflow</p>
<p>Policy Statement</p> <p>The policy statement is displayed to end users when they open items subject to this policy. The policy statement can explain which policies apply to the content or indicate any special handling or information that users need to be aware of.</p>	<p>Policy Statement: This policy runs the archive routine for each document 1 day after the document's archive date is reached.</p>
<p>Labels</p> <p>You can add a label to a document to ensure that important information about the document is included when it is printed. To specify the label, type the text you want to use in the 'Label format' box. You can use any combination of fixed text or document properties, except calculated or built-in properties such as GUID or CreatedBy. To start a new line, use the '\n' character sequence.</p>	<p><input type="checkbox"/> Enable Labels</p>
<p>Auditing</p> <p>Specify the events that should be audited for documents and items subject to this policy.</p>	<p><input type="checkbox"/> Enable Auditing</p>
<p>Expiration</p> <p>Schedule content disposition by specifying its retention period and the action to take when it reaches its expiration date.</p>	<p><input checked="" type="checkbox"/> Enable Expiration</p> <p>The retention period is:</p> <p><input checked="" type="radio"/> A time period based on the item's properties: Document Archive Date + 1 days</p> <p><input type="radio"/> Set programmatically (for example, by a workflow)</p> <p>When the item expires:</p> <p><input type="radio"/> Perform this action: Delete</p> <p><input checked="" type="radio"/> Start this workflow: Archive</p>
<p>Barcodes</p> <p>Assigns a barcode to each document or item. Optionally, Microsoft Office applications can require users to insert these barcodes into documents.</p>	<p><input type="checkbox"/> Enable Barcodes</p>

Fig.1

The expiration settings from Fig.1 (shown larger in Fig.2) instruct the system to start the 'Archive' workflow 1 day after the date set by the contributor in the 'Document Archive Date'.

Enable Expiration

The retention period is:

A time period based on the item's properties:

Document Archive Date days

Set programmatically (for example, by a workflow)

When the item expires:

Perform this action:

Delete

Start this workflow:

Archive

Enable Barcodes

Fig.2

Archive WorkFlow

The archive workflow has no inbuilt trigger (see Fig.3) as it is activated by the information management policy described above.

Workflow Designer - Archive

Define your new workflow

Choose the type of workflow and the conditions under which this new workflow should run.

Give a name to this workflow:

Archive

What SharePoint list should this workflow be attached to?

iPost Documents

Select workflow start options for items in iPost Documents:

Allow this workflow to be manually started from an item

Automatically start this workflow when a new item is created

Automatically start this workflow whenever an item is changed

Fig.3

The workflow has two steps – see Fig.4 below.

Workflow Steps

Send Email

Copy and Delete

[Add workflow step](#)

Fig.4

Step 1 – Send Email. This step sends an email to the document creator to inform them that their document has been archived and instruct how to restore if still requires a ‘live’ – see Fig.5

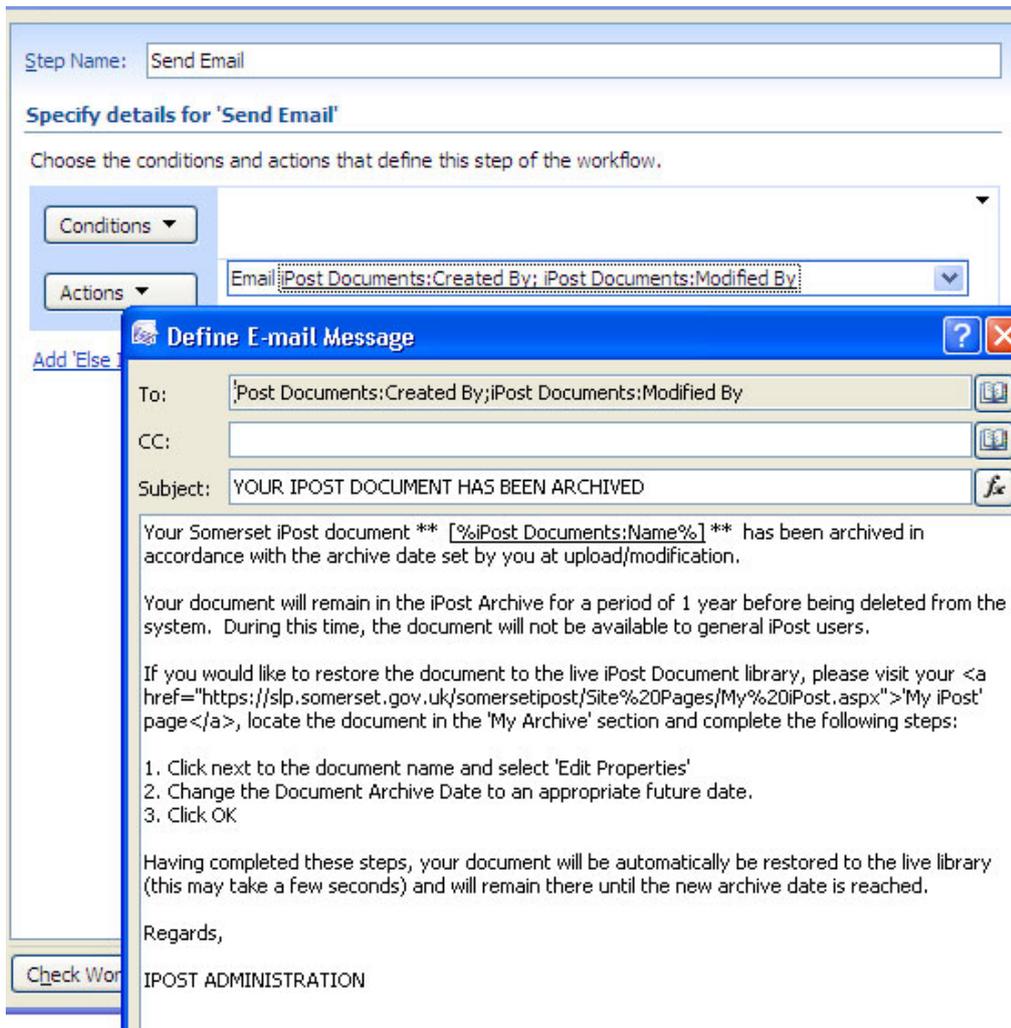


Fig.5

Step 2 – Copy and Delete. This step copies the file from the ‘iPost Documents’ library to the ‘iPost Archive’ library and then deletes the original from ‘iPost Documents’ – see Fig.6.

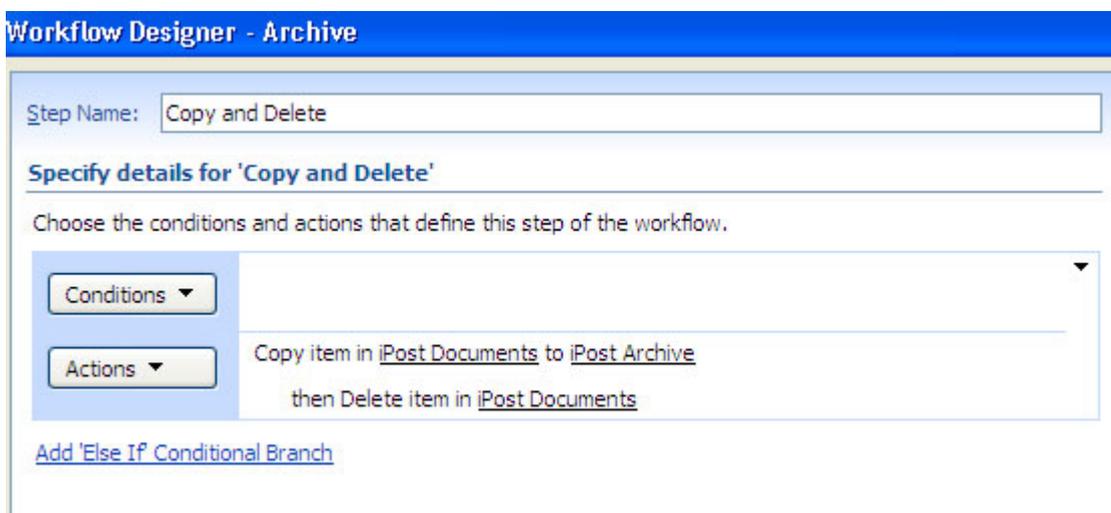


Fig.6

Reinstate Archived Document WorkFlow

A document will remain in the 'iPost Archive' library for 1 year before it is totally deleted from the site. If a user wants to reinstate a document from the archive to the live 'iPost Documents' library, they need only change the archived document's 'Document Archive Date' to a date in the future and the 'Reinstate Archived Document' workflow will automatically reinstate it.

The workflow is triggered when an item is changed - see Fig.7 below.

Choose the type of workflow and the conditions under which this new workflow should run.

Give a name to this workflow:

What SharePoint list should this workflow be attached to?

Select workflow start options for items in iPost Archive:

- Allow this workflow to be manually started from an item
- Automatically start this workflow when a new item is created
- Automatically start this workflow whenever an item is changed

Fig.7

There is one step to the workflow – Check, reinstate or stop (see Fig.8 below). Following a change to the document properties, the workflow is triggered and first checks whether the 'Document Archive Date' is greater than today. If so, the workflow copies the item from the archive to the live 'iPost Documents' library and deletes the archived version. If the archive date is not greater than today (i.e. the person making the change to the document properties was amending another field), the workflow stops and leaves the document in the archive library.

Workflow Designer - Reinstate Archived Document

Step Name:

Specify details for 'Check, reinstate or stop'

Choose the conditions and actions that define this step of the workflow.

Conditions	If <u>Document Archive Date</u> is greater than <u>Today</u>
Actions	Copy item in <u>iPost Archive</u> to <u>iPost Documents</u> then Delete item in <u>iPost Archive</u>
Conditions	Else if <u>Document Archive Date</u> is less than or equal to <u>Today</u>
Actions	Stop the workflow and log <u>Archived date unchanged</u>

[Add 'Else If' Conditional Branch](#)

Fig.8

Delete Archived Document

Archive documents are retained for a period of year 1 after their Document Archive Date and are then deleted from the site. This is managed through an expiration information management policy – see Fig.9 below.

Name and Administrative Description The name and administrative description are shown to list managers when configuring policies on a list or content type.	Name: Document
	Administrative Description: Run deletion workflow.
Policy Statement The policy statement is displayed to end users when they open items subject to this policy. The policy statement can explain which policies apply to the content or indicate any special handling or information that users need to be aware of.	Policy Statement: Documents will be deleted from the iPost library one year after they are archived.
Labels You can add a label to a document to ensure that important information about the document is included when it is printed. To specify the label, type the text you want to use in the 'Label format' box. You can use any combination of fixed text or document properties, except calculated or built-in properties such as GUID or CreatedBy. To start a new line, use the '\n' character sequence.	<input type="checkbox"/> Enable Labels
Auditing Specify the events that should be audited for documents and items subject to this policy.	<input type="checkbox"/> Enable Auditing
Expiration Schedule content disposition by specifying its retention period and the action to take when it reaches its expiration date.	<input checked="" type="checkbox"/> Enable Expiration The retention period is: <input checked="" type="radio"/> A time period based on the item's properties: Document Archive Date + 1 years <input type="radio"/> Set programmatically (for example, by a workflow) When the item expires: <input checked="" type="radio"/> Perform this action: Delete <input type="radio"/> Start this workflow: Collect Feedback
Barcodes Assigns a barcode to each document or item. Optionally, Microsoft Office applications can require users to insert these barcodes into documents.	<input type="checkbox"/> Enable Barcodes

OK Cancel Delete

Fig.9

The expiration settings are shown in detail at Fig.10 below – it is set so that when the date is 1 year greater than the document archive date, the 'Delete' action is performed.

Enable Expiration

The retention period is:

A time period based on the item's properties:

Document Archive Date + 1 years

Set programmatically (for example, by a workflow)

When the item expires:

Perform this action:

Delete

Start this workflow:

Collect Feedback

Fig.10