EVENT BASED RETENTION CONTROLS - WORKFLOW OPTIONS

Is it a signed Agreement or Contract? — Yes →

WF: Monitor Expired Agreements (Two versions of this WF)

Workflow #1 runs daily and looks for expiry dates that are 1 month away, then sends an email notification to the Contract Manager for any it finds.

Workflow #2 runs daily and looks for expiry dates for the current day. It changes the metadata status field to Expired and sends an email notification to the Contract Managers on any it finds.

No ↓

Is it a Fire or Fireworks Permit? — Yes →

WF: Fire Permits - Move Expired Permits to Expired Fire Permits Folder

This WF moves expired permits into the expired permits folder and also combines the application with the actual permits.

RETENTION IS NOT EVENT BASED, but must be mentioned as the template has an Expiry Date and all other WF's are told to ignore these.

No ↓

Is it a Training Certificate or a License? — Yes →

WF: Monitor Expiry Dates (not Agreements)

This WF looks for *non*-Agreement templates that have expiry dates. It will immediately move expired items to Record Series Incoming, leaving behind a shortcut, and sends out an email notification. Runs daily looking for expiry dates for the current day.

No ↓

Is it a Project that is not opened/closed within the same year? — Yes →

WF: Active and Inactive Field setting changes

This WF watches the **folder** metadata for a field change on the Active/ Inactive field. It then adds a Date Closed field to all entries in the folder and subfolders, and adds the "Archive, leave shortcut" retention instruction **on the folder** for year end archive processes to see.

If any of these conditions are true
  Entry : Field (Active/Inactive) equals Active File, Do Not Archive
  Entry : Field (Active/Inactive) equals Inactive File, Ready to Archive

No ↓

Is it a Legal Hold folder that is being held indefinitely? — Yes →

WF: Route to Record Series - based on Legal HOld Ended date

This WF watches the **folder** metadata. If a **Legal Hold Ended** field date is added, the WF immediately moves all the entries in the target folder into a Record Series\Legal Hold folder, leaving behind shortcuts in the target folder. *This option allows the entries to go immediately into a protected folder where the Administrator may set the retention without viewing the documents (for when privacy protection is needed).*

If all of these conditions are true
  Entry : Type equals Folder
  Entry : Field (Date Legal Hold Ended) is not empty
  User does not equal workflow
  Entry : Path contains Legal Hold

No ↓

Is it filed in a Closed folder when done? — Yes →

WF: Monitor Event Controlled Folders - Mark Date Completed

This WF watches for any **entry moved** into a specific folder, then acts on the entry by adding the Completed date and adding an "Archive, but leave shortcut" tag for the Mass Archive process to see on December 31st.

If all of these conditions are true
  Entry : Path equals \- PUBLIC HEALTH\Cemetery Assistance Grant\Grant Applications\Closed Applications

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