**Overview of Archive Processes**

**WF1 – “Archive a Document”**

* This WF runs all year long. Any document dropped into the Archive folder will start this WF, which will remove the document to Record Series immediately, with no shortcut left behind, and will also add the word “…ARCHIVED” to the end of the document’s name, and will add a “Date Archived” field.
* The folder the documents go to is called, “RECORD SERIES - Archive (incoming)” and the LF Administrator will then need to move these documents into the right Record Series folders, depending on how long we are required to keep the records (referring to the current Retention Schedule).
* *We could also have the WF add a watermark (Archived) if we want, however, at this point the watermark is not being added.*

**WF2 – “Set Retention on Documents”** 

* This WF runs all year long. It will set the field called “Retention Plan for this Document” on every document, immediately upon it being placed in a folder, based on the metadata set on that folder.
* Each time a document is moved from one folder to another folder, this WF will activate again and attempt to match the metadata on the document according to what is on the new folder.
* Some folders hold documents with mixed retention expectations. Those folders are currently being left blank for this metadata.
* This WF is setting up for WF5, which controls where the documents end up in the archive sorting folder called “RECORD SERIES - Archive (incoming)”.

**WF3 – “Set Archive Tags December 25th”** 

* Every folder has a field that is set to control what happens with documents at the end of the year. Do they get archived, or do they not? Does the staff need a shortcut left behind, or do they not?
* On December 25th, this WF will search out every folder and decide whether to set an archive tag on the documents, based on what choice was set on this metadata field.
* This WF is setting up for WF4 which will do the actual work of pulling all the right documents (by looking for these Archive tags) into the Record Series folders where they need to be set up for proper retention.
* **WF3a – “Remove Archive Tags on CURRENT”** – At the end of WF3, another WF is invoked to go through and double check to make sure we didn’t accidentally tag any CURRENT documents (See Procedure called “Laserfiche Procedures - Special Documents” for more information on this type of document.

**WF4 – “Archive (Mass Archive on Dec 31st)”**

* The Mass Archive workflow will search out documents tagged with any one of two Archive tags, leaving shortcuts behind where it finds them (depending on which Archive tag it finds). The WF will remove the tagged documents to the archive sorting folder called “RECORD SERIES - Archive (incoming)”.
* It also removes the tags and renames the documents with the word “Archived” at the end of the names.
* It also records the original path on the moved documents by putting that path into a metadata field called “Original File Path”.

**WF5 – “Move Archived Documents to a Retention Folder”**

* This WF looks at every document brought into the archive sorting folder called “RECORD SERIES - Archive (incoming)” and files them based on the metadata in the field called “Retention Plan for this Document”.
* This will mean that when the Archive processes happen at the end of the year, a large majority of the work the LF Administrator must do (in January) in sorting documents for the Record Series will already be done. This is a significant saving of time for the LF Administrator.

**Prior to the current year’s mass archive process:**

1. Check that the folders’ settings are correct, every folder in the repository!
2. Check to see what folders are marked for no archiving.