



GARGANTUA DATABASES
DOCUMENT LIFECYCLE

ADMINISTRATION TOOL

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INTRODUCTION

WHAT IS THE DOCUMENT LIFECYCLE?

Some documents (invoices, contracts...) have a predictable time-limit after which they are no longer valid. It is then useful to set up an automatic process in order to archive, delete, move, tag, convert them in pdf, etc. : such a process is commonly called the “lifecycle” of the document.

HOW IS THE DOCUMENT LIFECYCLE IMPLEMENTED IN GARGANTUA?

In GARGANTUA, the lifecycle for a category of production objects is set at the level of the **form** they use; it is then possible to define conditions, using the [graphical interface](#) or [custom scripts](#), so that different rules apply to different sub-categories of objects and the archival, deletion... interval can be adjusted with a very high level of granularity.

Besides, for the lifecycle function to work, you need to set the automatic lifecycle processing scheduler in order to define the frequency with which objects will be scanned in order to be archived, deleted, moved, converted, etc.

“LIFECYCLE” TAB AT FORM LEVEL

The **Lifecycle** tab in the form management screen is as follows:

1. **These objects do not have any lifecycle defined:** this option is selected by default when a new form is created. It means the lifecycle function is disabled for the corresponding objects.



This option is selected permanently for the default form: only custom forms can have a defined lifecycle.

2. **Scheduler of automatic lifecycle processing:** this field allows you to set the frequency at which objects associated to the form will be scanned in order to be archived, deleted, moved... if needed.
3. **Simplified lifecycle:** this option makes it possible to archive, delete, move... the objects that use this form after a given delay.
4. **Advanced lifecycle:** this option makes it possible to archive, delete, move... the objects that use this form after a given delay, if they meet one or more conditions.
5. **Custom lifecycle:** this option makes it possible to use custom scripts in order to archive, delete, move... the objects according to multiple criteria and with a very high level of granularity.

SETTING THE SCHEDULER OF AUTOMATIC LIFECYCLE PROCESSING

If you want to set an automatic lifecycle management process for objects indexed with a given form, you need to set the scheduler of automatic lifecycle processing:

1. In the left pane of the Administration Tool, click the branch corresponding to the form of your choice.
The form management screen displays in the right pane.
2. In the right pane, click the **Lifecycle** tab.
3. If necessary, select the **Has lifecycle** option.
4. In the **Scheduler of lifecycle processing** field, enter the appropriate regular expression, depending on the frequency with which you want the objects scanned.

You must use a cron-like syntax. For more details on this syntax, click the **Show help** link next to the **Scheduler of lifecycle processing** field, or click the **Show wizard** link to create step by step the scheduler.

Example:

☐ These objects do not have any lifecycle defined.

☒ Has lifecycle

Scheduler of automatic lifecycle processing : [Show wizard](#) [Show help](#)

Next scheduled executions : 1. 14/01/2016 01:30:00
2. 15/01/2016 01:30:00
3. 16/01/2016 01:30:00
4. 17/01/2016 01:30:00
5. 18/01/2016 01:30:00

Next start execution : 14/01/2016 01:30:00

5. In the bottom left corner of the right pane, click the **Apply** button.

The next time when the lifecycle will be processed is indicated below the **Automatic lifecycle processing scheduler** field.

SETTING A SIMPLIFIED LIFECYCLE

A simplified lifecycle allows you to set a time limit after which all the objects indexed with a given form will be automatically archived, deleted permanently, moved to a new storage area, etc.

Example: the “Management” database is used to store invoices sent by vendors. Vendor invoices are always indexed with the “Vendor Invoice” form. When they are being uploaded into GARGANTUA, and during the two years that follow, vendor invoices need to be stored on a quick hard drive, in order to be scanned and processed easily. After these two years, vendor invoices are less frequently accessed, and can be archived and transferred to the “Invoices” storage area, located on a slower but bigger hard drive.

To implement a simplified lifecycle, proceed as follows:

1. In the left pane of the Administration Tool, click the branch corresponding to the form of your choice.
The form management screen displays in the right pane.
2. In the **Lifecycle** tab in the form management screen, select the **Has lifecycle** option.
3. Select the **Simplified lifecycle** option.

- ☒ Simplified lifecycle
☐ Advanced lifecycle
☐ Custom lifecycle



Simplified lifecycle rules allow you to set simple archiving and destruction delays for all folders and documents of this type; you can set the delay and a reference date, either system date or an attribute value.

☒ Archive	5	month(s)	After	Create date	
☒ Dispose	1	year(s)	After	Archive date	
☒ Convert to PDF	3	day(s)	After	Date of reception	
☒ Tag	1	month(s)	After	Create date	with ABCD
☐ Move	1	year(s)	After	Create date	in
☐ Change security	1	year(s)	After	Create date	to
☐ Start validation cycle	1	year(s)	After	Create date	with
☐ Start process	1	year(s)	After	Create date	with
Attribute used to indicate to the system that the document has already been used to start a process:					
☐ Execute script	1	year(s)	After	Create date	with

4. If you want to archive the objects after a given time limit:
 - Check the **Archive** checkbox.

An **Archive date** system attribute is now available for the **Dispose** and **Move** options.

- In the fields corresponding to the **Archive** option, select the appropriate time limit and the date attribute you want to use as a reference (the date attribute can be either a system or a

custom attribute).

5. If you want to delete the objects after a given time limit:

- Check the **Dispose** checkbox.



As long as an object has not been archived, it cannot be automatically deleted. Thus, if you choose to archive documents two years after their creation, and to delete them one year after their creation, they will actually be deleted right after they are archived, that is two years after their creation.

- In the fields corresponding to the **Dispose** option, select the appropriate time limit and the date attribute you want to use as a reference.

6. If you want to convert the documents to pdf after a given time limit:

- Check the **Convert to PDF** checkbox.
- In the fields corresponding to the **Convert to PDF** option, select the appropriate time limit and the date attribute you want to use as a reference.

The original documents will be replaced by their pdf versions.

7. If you want to tag the documents after a given time limit:

- Check the **Tag** checkbox.
- In the fields corresponding to the **Tag** option, select the appropriate time limit and the date attribute you want to use as a reference, and the tag you want to use, in the drop-down list.

The documents will be tagged as defined.

			Label	Size	Modification	Creation	Type
		1	Number of products sold in France	41,46 Kb	3 months ago	3 months ago	Microsoft Excel spreadsheet

8. If you want to move the objects to another storage area after a given time limit:

- Check the **Move** checkbox.
- In the fields corresponding to the **Move** option, select the appropriate time limit, the date attribute you want to use as a reference, and the target storage area, in the drop-down list.



You cannot use this feature with storage areas of "Optical media storage" type.

9. If you want to change the security profiles assigned to the objects after a given time limit:

- Check the **Change security** checkbox.
- In the fields corresponding to the **Change security** option, select the appropriate time limit, the date attribute you want to use as a reference, and the future security profile, in the drop-down list.

10. If you want to start a validation cycle on the objects after a given time limit:

- Check the **Start validation cycle** checkbox.
- In the fields corresponding to the **Start validation cycle** option, select the appropriate time limit, the date attribute you want to use as a reference, and the validation cycle you want to

start, in the drop-down list.

11. If you want to start a process from a document after a given time limit:

- Check the **Start process** checkbox.
- In the fields corresponding to the **Start process** option, select the appropriate time limit, the date attribute you want to use as a reference, and the process you want to start, in the drop-down list.

The process will start with a copy of the document.

- You can choose an attribute in the drop-down list below, to indicate to the system that a particular **document has already been used to start a process**. This way, the system will know that the process should not be started again for this document. If you do not choose any attribute, at the next lifecycle execution, then the system will keep starting the process for this document.



The attribute must be boolean. Its value will automatically be checked to “yes”, to indicate to the system that the document has already been used to start a process.

12. If you want to execute a script after a given time limit:

- Check the **Execute script** checkbox.
- In the fields corresponding to the **Execute script** option, select the appropriate time limit, the date attribute you want to use as a reference, and the script you want to execute, in the drop-down list.

13. When you are done, click the **Apply**, **Compilation** and **Deploy** buttons, so that the new settings are saved and applied.

The objects ready for archival, deletion, etc. will be searched for when the lifecycle is next processed (see [Setting the automatic lifecycle processing scheduler](#)).

SETTING AN ADVANCED LIFECYCLE

An advanced lifecycle allows you to set different lifecycle rules for the objects indexed with the current form according to different conditions.

To implement an advanced lifecycle, proceed as follows:

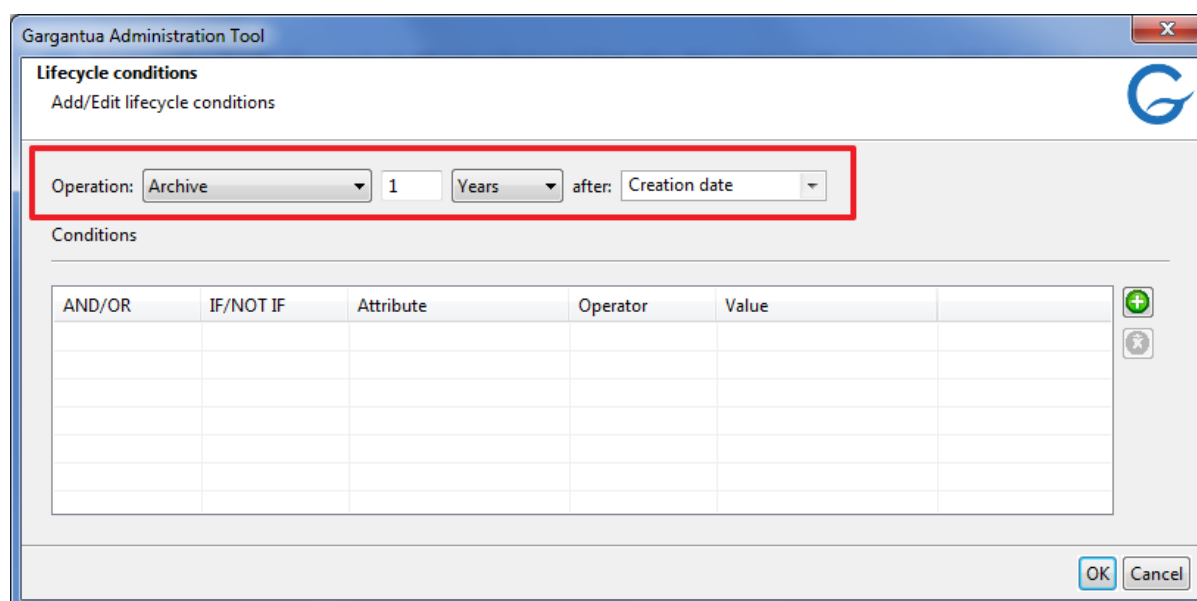
1. In the left pane of the Administration Tool, click the branch corresponding to the form of your choice.

The form management screen displays in the right pane.

2. In the **Lifecycle** tab in the form management screen, select the **Has lifecycle** option.
3. Select the **Advanced lifecycle** option.
4. Click the  button in order to add a new rule.

The **Lifecycle conditions** dialog displays.

5. Define the operation to be performed: should the objects be archived, deleted, moved... and when?



Gargantua Administration Tool

Lifecycle conditions
Add/Edit lifecycle conditions

Operation: Archive 1 Years after: Creation date

Conditions

AND/OR	IF/NOT IF	Attribute	Operator	Value	

OK Cancel

6. Click the  button to add a condition.

A new row displays in the conditions table.

7. In the new row, define the first condition that has to be fulfilled: **AND/OR** operator (from 2 conditions), **IF/NOT IF** operator, attribute which value will be compared, comparison operator, value to which the attribute's value will be compared.

Lifecycle conditions
Add/Edit lifecycle conditions

Operation: Archive 1 Years after: Creation date

Conditions

AND/OR	IF/NOT IF	Attribute	Operator	Value
--	IF	Date of reception	Equal to	13/01/2016

OK Cancel

8. If necessary, use the and buttons to add and/or delete conditions.
9. When you are done, click **OK** to close the dialog.
10. If you want to define other lifecycle rules for the objects that use the current form, click the button under the **Advanced lifecycle** heading again.

- ☐ Simplified lifecycle
☒ Advanced lifecycle
☐ Custom lifecycle

Advanced lifecycle rules allow you to set different archiving and destruction delays using conditions based on attribute values for folders and documents of this type; you can set the delay and a reference date, either system date or an attribute value.

Operation	Condition	Delay	After	Storage area / Tag / Securi...	
Archive	IF (Date of reception EQUAL TO 13/01/2016)	1 year(s)	Create date	-	

11. If you want to delete and/or edit existing rules, use the and buttons.
12. When you are done, click the **Apply**, **Compilation** and **Deploy** buttons, so that the new settings are saved and applied.

The objects ready for archival, deletion, etc. will be searched for when the lifecycle is next processed (see [Setting the automatic lifecycle processing scheduler](#)).

SETTING A CUSTOM LIFECYCLE

A custom lifecycle allows you to use custom scripts to archive, delete, move... some objects according to multiple criteria.

To implement a custom lifecycle, proceed as follows:

1. In the left pane of the Administration Tool, click the branch corresponding to the form of your choice.

The form management screen displays in the right pane.

2. In the **Lifecycle** tab in the form management screen, select the **Has lifecycle** option.
3. Select the **Custom lifecycle** option.
4. Enter your custom script in the dedicated field.

- ☐ Simplified lifecycle
☐ Advanced lifecycle
☒ Custom lifecycle



Custom lifecycle allows you to create a script that decides whether a folder or document can be archived or disposed. Separate functions are defined for archive and destruction and they must return true to allow the operation or false otherwise.

```
1 function canArchive(obj) {  
2     // TODO add code here  
3     return false;  
4 }  
5  
6 function canDispose(obj) {  
7     // TODO add code here  
8     return false;  
9 }  
10  
11 function canMoveFile(obj) {  
12     // TODO add code here  
13     return '<storage-id>';  
14 }  
15  
16 // 0 - default black color  
17 // 1 - foreground color red  
18 // 4294967296 - background color red  
19 // 2 - foreground color orange  
20 // 8589934592 - background color orange  
21 // 4 - foreground color green  
22 // 17179869184 - background color green  
23 // 8 - foreground color blue  
24 // 34359738368 - background color blue  
25 // 16 - foreground color mauve  
26 // 68719476736 - background color mauve  
27  
28 function canTagDocument(obj) {  
29     // TODO add code here  
30     return 0;  
31 }  
32  
33
```

Line: 1 Column: 27

5. When you are done, click the **Apply**, **Compilation** and **Deploy** buttons, so that the new settings are saved and applied.

The objects ready for archival, deletion, etc. will be searched for when the lifecycle is next processed (see [Setting the automatic lifecycle processing scheduler](#)).