

M-Files module for the management of electronic documents and physical records inventory

Features

- Automatically associate retention rules according to retention schedule.
- Calculate the retention period based on your retention rules.
- Manage and update retention rules according to your needs.
- Create and apply holds for financial or legal reasons.
- Organize the disposition of your documents once they have reached the final stage of the retention schedule.



All information regarding document retention is added to the metadata to provide visibility into their lifecycle. It is up to the organization to decide whether this information should be visible to all users or only to individuals responsible for document management.

Retention Information	
Official Record	<input checked="" type="checkbox"/>
Retention Rule	FN03 - General Financial Records 🔗
Effective Rule	FN03 - General Financial Records 🔗
Retention Status	● Inactive
Active Start	2021-10-20
Active End	2021-12-31
Inactive End	2029-12-31
Hold	---
End of Hold	---
Disposition	---
Disposal Method	Destroy
Calculation Details	Retention Rule "FN03 - General Financial Records"
	ACTIVE END
	Start date: 2021-10-20
	Use year end: 2021-12-31
	Add no other duration: 2021-12-31
	INACTIVE END
	Start date: 2021-12-31
	Add 8 year(s): 2029-12-31
	Updated on 2023-01-24 10:21:01 AM

Properties included on the metadata card:

- Retention rule
- Active—Start
- Active—End
- Inactive—End
- Hold
- End of Hold
- Disposition
- Calculation Details

M-Files

