What is auto delete option for matters?

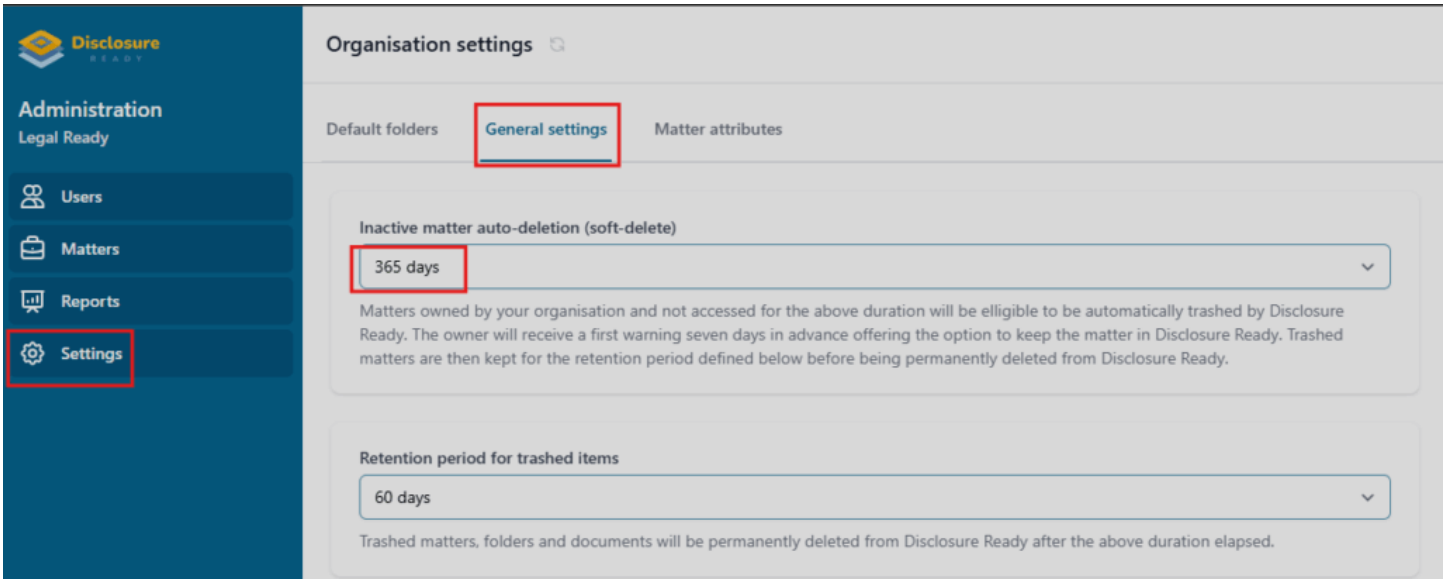
Matters and Templates · https://disclosureready.us.legalready.ai/knowledge/what-is-auto-delete-option-for-matters/

All firms face the challenge of aging matters and the need to manage ever increasing information. In Disclosure Ready there are a number of options to provide structure on how to manage matters.

1. Expiring Matters

If the Organisation Administrator activates the matter expiration feature, matters will expire automatically when it is applicable, which reduces the volume of matters from the User dashboard.

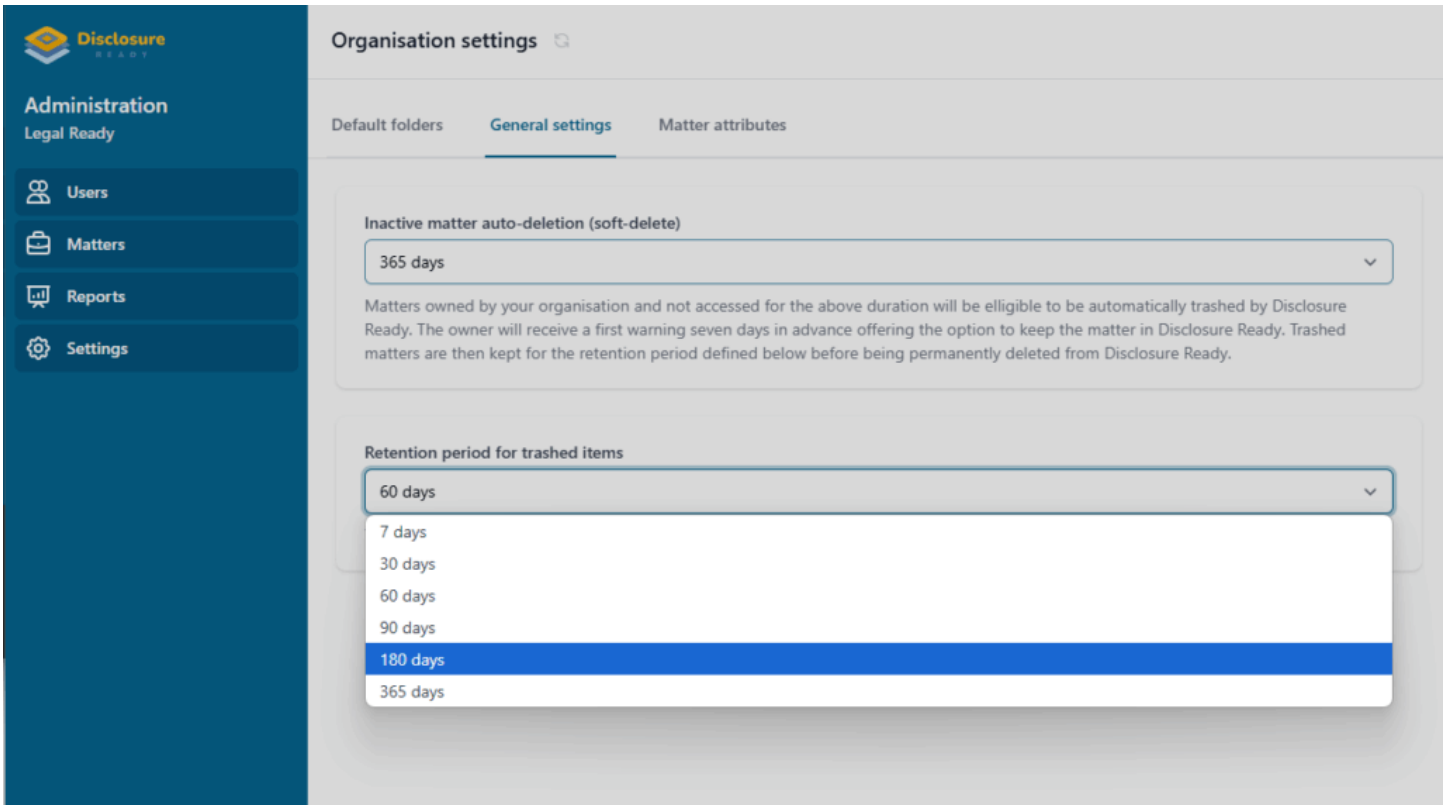
The Organisation Administrator can select the duration of how long the Expiring Matter is retained before soft auto-deletion, up to 365 days.



Please note that matters owned by your organisation and not accessed for the selected duration will be eligible to be automatically trashed by Disclosure Ready. The owner will receive a first warning seven days in advance offering the option to keep the matter in Disclosure Ready. Trashed matters are then kept for the defined retention period below before being permanently deleted from Disclosure Ready.

2. Trashed Matters

Once the expired matters are trashed, there is an option to retain the matters for a period from 7 days to 180 days.



Trashed matters, folders and documents will be permanently deleted from Disclosure Ready after the selected duration has elapsed.

Should you wish to restore a trashed matter, this can be done within the retention period from the Administrator module → Matters → Restore Matter.

