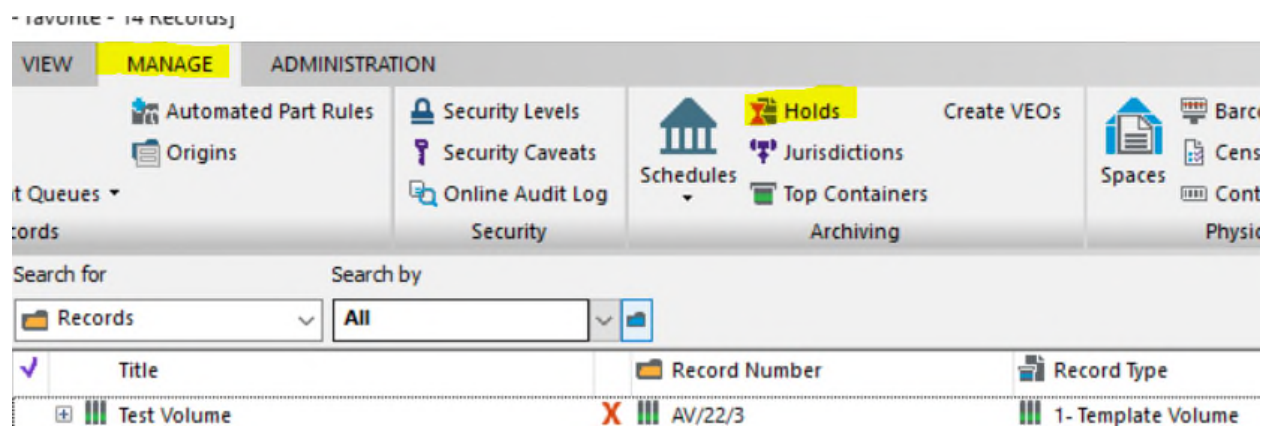


Note: Only ORMS team (Arikkan, Chaves and Archives team) can create a Hold for clients. Clients can then add or remove records from a Hold.

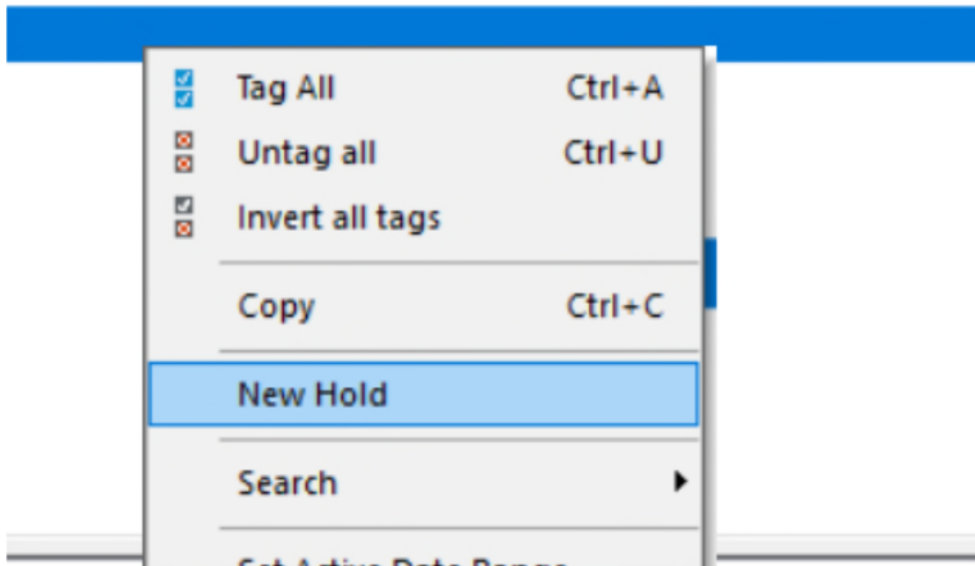
Holds enable you to set up categories of records temporarily on hold from disposition (destruction), or to prevent any modifications of selected records. For example, litigation or discovery may require the agency to place a Legal Hold on certain records.

There are two types of Holds: One prevents only the disposition of the records; the other type of Hold prevents any modification to records/metadata as well as the disposition.

Holds can be accessed under the Manage tab:



Click on **Holds** under manage>right click in the blank area> New Hold>



Create a new Hold with a Title, Contact Location, Active From, Active To (leave the “Active To” field blank if you are unsure when the records will be removed from a Hold).

New Hold

Hold Notes

Hold Title

test

Contact

gogia

Active From

07/19/2022

Active To

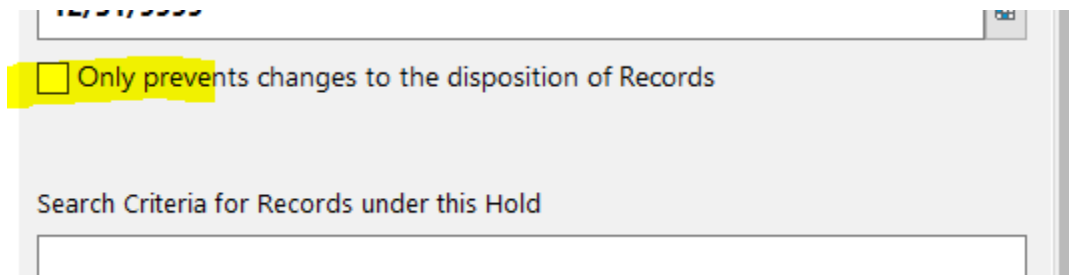
|

☐ Only prevents changes to the disposition of Records

Search Criteria for Records under this Hold

OK Cancel Help

If you want your Hold to prevent the disposition of the record, but still allow modifications to record content or metadata, check the small radio button >



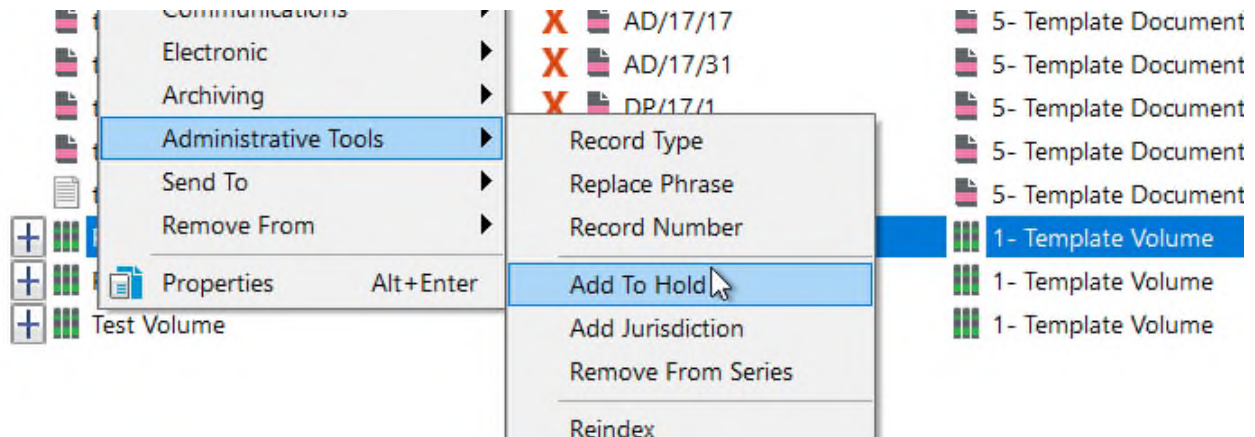
☐ Only prevents changes to the disposition of Records

Search Criteria for Records under this Hold

If you have any notes, you can type them in the notes field.

Applying Holds on Records:

Search for the records>tag them>right click >Administrative Tools>Add To Hold



Find your Hold> OK

	Oregon Medical Grade Vs. Oregon City		10/13/2015	12/31/9999
	PUC Demo	Liu, Qing	02/15/2012	12/31/9999
	Springfield SD Legal Hold	Price, Brian	06/22/2017	12/31/9999
	Stephanie Test Legal Hold	Ascuena, Kathy	05/22/2015	12/31/9999
	test	West Linn Power U...	05/12/2022	12/31/9999
	test2		05/13/2022	12/31/9999
	test7_19	Gogia, Amandeep	07/19/2022	12/31/9999
	...	...	...	...

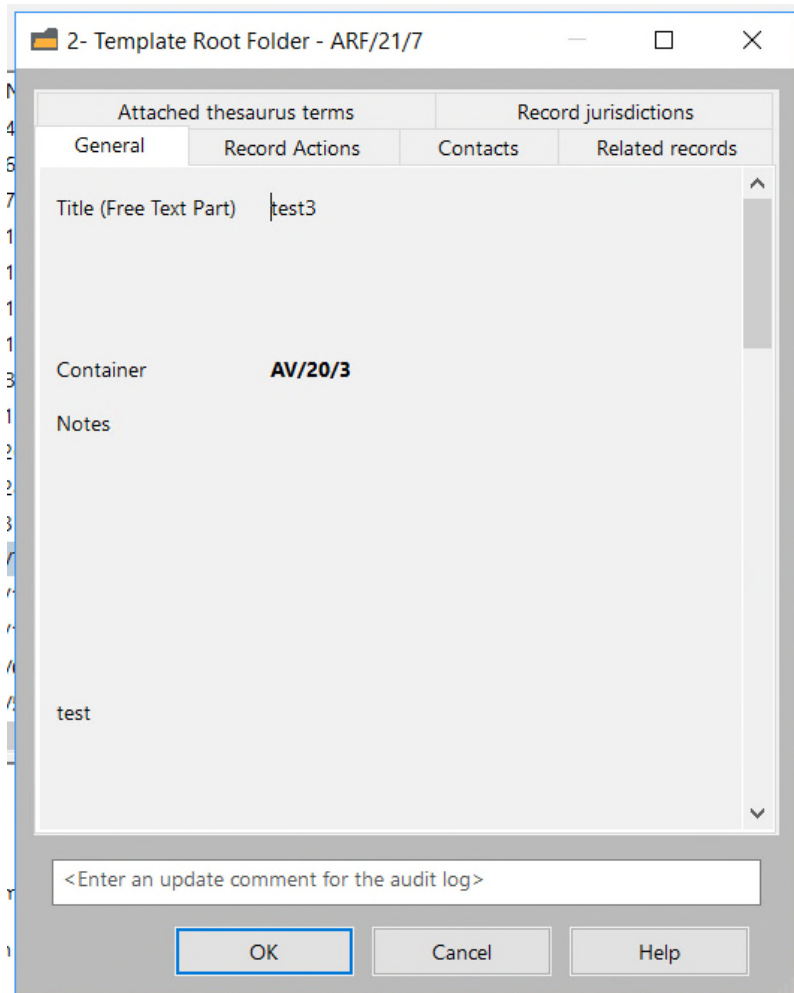
Customize the list pane> Format Column>add column 'Is in one or more Holds'>

✓	Title	Is in one or more ...	Record Number
	 test	 No	 AD/17/4
	 test 1281	 No	 AD/17/6
	 test test 2 12	 No	 AD/17/7
	 test 1281	 No	 AD/17/14
	 test - 1281	 No	 AD/17/15
	 test test 2 12	 No	 AD/17/16
	 test test 2 12	 No	 AD/17/17
	 test	 No	 AD/17/31
	 test - for webdrawer	 No	 DP/17/1
	 test	 No	 AV/18/26
	 test	 No	 AV/18/28
	 Revenue	 Yes	 AV/20/3
	 test3	 Yes	 ARF/21/7
	 test	 Yes	 ARF/21/6
	 test for destruction	 Yes	 ARF/21/5

Customize properties pane:

<	
Record Number	 AV/20/3
Is in one or more holds	 Yes
Access Control	View Document: People in (ORMS Trim Administrators) and who are also in (ORMS Trim Administrators (see Record Type '1 - Template Volume'))

Properties of a sample record on Hold:

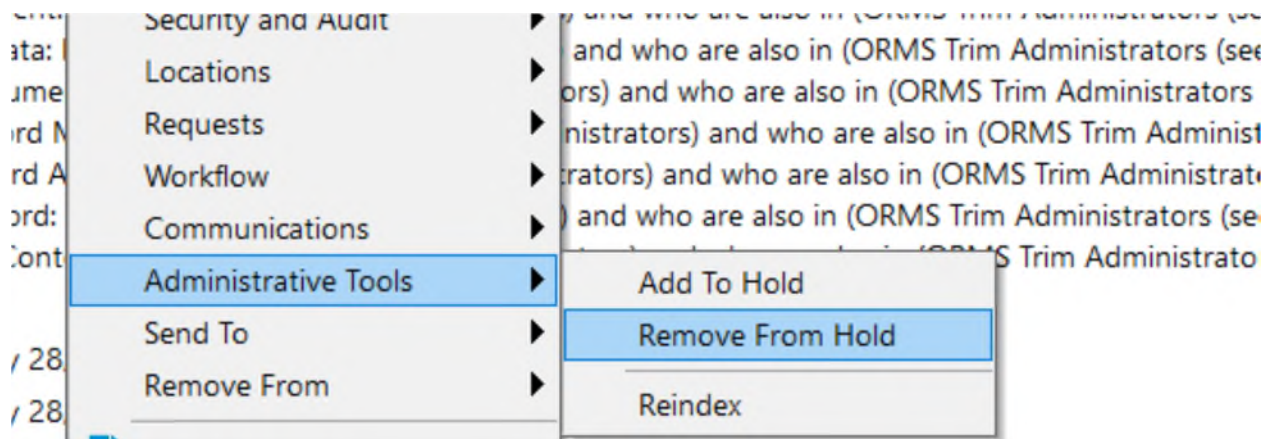
A screenshot of a software window titled "2- Template Root Folder - ARF/21/7". The window has a tabbed interface with four tabs: "General", "Record Actions", "Contacts", and "Related records". The "General" tab is active. It contains a "Title (Free Text Part)" field with the value "test3". Below this is a "Container" field with the value "AV/20/3". There is a "Notes" section with a text area containing the word "test". At the bottom of the window is a text input field with the placeholder text "<Enter an update comment for the audit log>". Below this field are three buttons: "OK", "Cancel", and "Help".

Removing Records from Holds

Right click> Administrative Tools> Remove from Hold

Record Number	AV/20/3
Is in one or more holds	Yes
Access Control	View Document: People in (ORMS Trim Administrators) and who are also in (ORMS Trim Administrators (see Rec

Right click on the records> Administrative Tools > Remove from Hold



Delete Holds> Right Click> Delete



Holds

