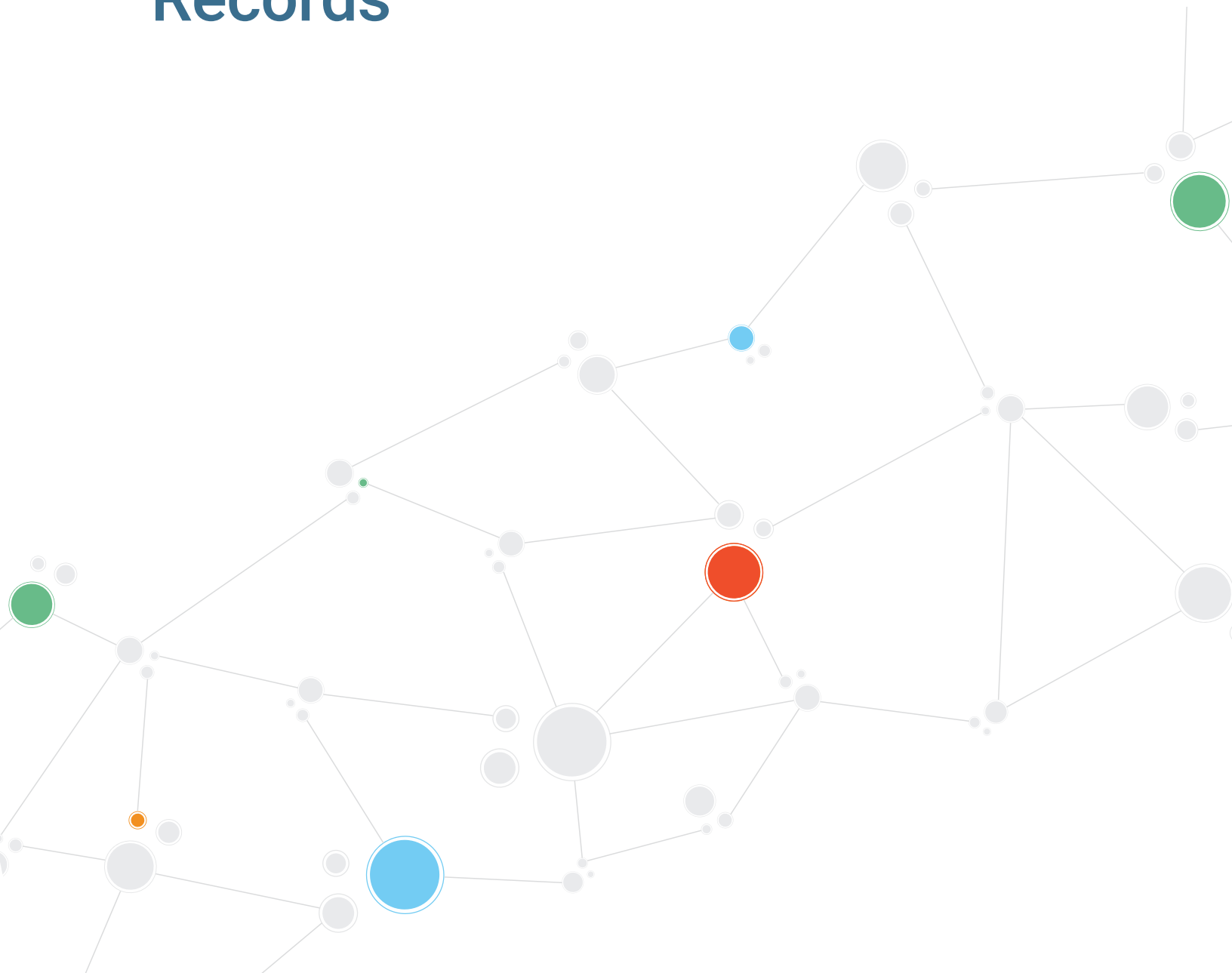




Enhance Microsoft 365 with Gimmal Records



File Plan

	E3	E5	E5 + Gimmel
Categories	Labels only	File Plan based on labels	File Plan uses labels + other metadata to automatically classify
Hierarchical	No File Plan	Flat	File Plan elements are hierarchical to make organization easier
Inheritance	No	No	Inheritable lifecycles and approver groups
Reusable Elements	No	No	Categories, retentions, triggers, and lifecycle policies are reusable throughout the file plan

Classification & Labeling

	E3	E5	E5 + Gimmel
Manually Apply	Yes	Yes	Yes
Rule Builder	E3 does not allow automatic labeling	Basic rule builder	Advanced visual rule builder
AI	No	Trainable classifiers	M365 Trainable classifiers
Document Library	Apply a single label to all items in a library	Apply any label throughout a library using rules	Apply any label throughout a library built using visual rule builder
Content Outside of Microsoft 365	Content must be imported into M365	Content must be imported into M365	Ability to classify and manage content outside M365 without importing
Prioritization	Based on principles that may change	Based on principles that may change	Classifications can be prioritized to determine which one "wins"

Retention

	E3	E5	E5 + Gimmel
Time Based	Use created, modified, or labeled date	Use created, modified, or labeled date	Use any date property including custom properties
Event Based	No	Yes, manually create event occurrences	Use Power Automate to create event occurrences
Case Based	No	No	Combine content into a single case record
Rule Based	No	No	Build rules to start retention
Recurring	No	No	Create recurring events (for example, records that need to be cut off yearly)
Multiple Retention Outcomes	No	No	Record may have more than one possible retention outcome

Record Declaration

	E3	E5	E5 + Gimmel
By Label/Classification	No	Yes	Yes
After Lifecycle Phase	No concept of lifecycle phases	No concept of lifecycle phases	May be declared at the end of a phase
Manually	No	No	May be declared a record manually at any time
Obsolete	No	No	Records may be declared obsolete
Supersede	No	No	Records may be superseded
Immutable	No	No	Yes
Vital	No	No	Records may be declared as vital to the business

Lifecycle/Policy

	E3	E5	E5 + Gimmel
Multi Phase Lifecycles	No	No	Lifecycle policies may include multiple stages
Reusable	No	No	Lifecycle policies may be reused on any classification
Multiple Retention Outcomes	No	No	Record may have more than one possible retention outcome

Disposition

	E3	E5	E5 + Gimmel
Inbox	No	No	Inbox to see records waiting for your approval
Transfer On Expiration	No	No	Records can be transferred to another location
Make Permanent	No	No	Records can be in place permanently
Automatic	Records are automatically deleted when expired	Optionally delete records automatically	Optionally take a disposition action automatically
Review	No	Records can be reviewed by a user or group	Records can be reviewed by a user or group
Multi-Step Review	No	No	Records can go through multiple steps of review before disposition
Reject	No	No	Records can be rejected and held until future decisions
Extend	No	Retention may be extended	Retention may be extended according to policy
Legal Hold	No	No	Records may be placed on a legal hold from the Inbox
Disposed List	No	List records disposed for a date range	List records disposed only for classifications that should be tracked
Disposition Certificate	No	No	Certificate showing which classifications were disposed on specific days

Physical Records

	E3	E5	E5 + Gimmel
Manage Physical Files	No	No	Manage all types of physical files
Event Based	No	No	Manage the containers that physical records may reside in
Case Based	No	No	Manage physical locations or logical locations for physical records storage
Rule Based	No	No	Request and manage the delivery of physical files to end users



Gimmel allows users to take control of their information with software that discovers, captures, manages, governs, and archives information so you can focus on your core mission. Gimmel software allows you to fully manage the lifecycle of content in SharePoint, Office 365, box, SAP, and other platforms.

Learn more at www.gimmel.com.

