

# Clearwell Legal Hold Module

## Data Sheet: Archiving and eDiscovery

The Clearwell Legal Hold Module enables corporations, law firms, and government agencies to automate and manage their legal hold process. The Module streamlines legal hold management by enabling a repeatable workflow that allows Legal teams to satisfy the duty to preserve from anticipation to completion of litigation. Since the Module is part of the Clearwell eDiscovery Platform, users have one seamless application to not only manage hold notices but also rapidly identify and collect critical data on demand. As a result, the Clearwell Legal Hold Module minimizes the risk of sanctions while providing the highest level of defensibility across the entire eDiscovery lifecycle. Key features of the Legal Hold Module include:

**Hold Notices:** Hold notices can be quickly created and sent to relevant custodians and system administrators via email. Different notices can be sent to custodians and system administrators, streamlining the notification process. Notices can be sent immediately or scheduled for delivery.

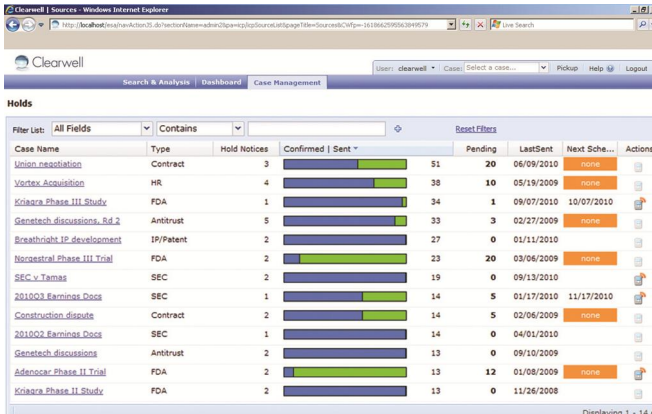
**Reminders:** Reminder email notices can be scheduled for delivery to non-responsive custodians, eliminating the need for manual follow-up.

**Escalations:** Escalation email notices can be scheduled for delivery to a custodian's manager if a custodian is not responsive, simplifying the legal hold process while maximizing compliance.

**Notice Library:** Hold notices can be saved as templates in the Notice Library for reuse, enabling administrators to achieve greater consistency and efficiency across the legal hold process.

**Mail-Merge:** When developing templates, variable fields, such as Case Name and Custodian Name, can be automatically populated to deliver customized custodian notices, eliminating manual efforts.

**Automated Tracking and Reporting:** Administrators have immediate visibility into the status of all legal hold notices across all cases through a single pane of glass. Administrators can drill-down by case to view the status across all custodians, including those who have received and responded to their hold notices, and those who haven't.



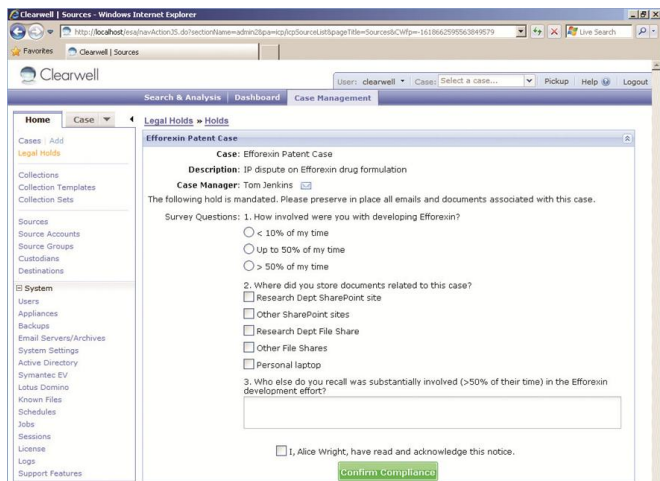
Case Name	Type	Hold Notices	Confirmed	Sent	Pending	LastSent	Next Sched.	Actions
Union negotiation	Contract	3	51	20	06/09/2010	none		
Vortex Acquisition	HR	4	38	10	05/19/2009	none		
Kiara Phase III Study	FDA	1	34	1	09/07/2010	10/07/2010		
Genetech discussions_Rd 2	Antitrust	5	33	3	02/27/2009	none		
Breathright IP development	IP/Patent	2	27	0	01/11/2010			
Biocastrol Phase III Trial	FDA	2	23	20	03/06/2009	none		
SEC v Tamas	SEC	2	19	0	09/13/2010			
201003 Examines Docs	SEC	1	14	5	01/17/2010	11/17/2010		
Construction dispute	Contract	2	14	5	02/06/2009	none		
201002 Examines Docs	SEC	1	14	0	04/01/2010			
Genetech discussions	Antitrust	2	13	0	09/10/2009			
Adenocarc Phase II Trial	FDA	2	13	12	01/08/2009	none		
Kiara Phase II Study	FDA	2	13	0	11/26/2008			

**Automatic Tracking and Reporting:** Gain rapid visibility into the status of all legal hold notices across all cases

**One-Click Hold Release:** One or more custodians can be quickly released from a hold with one simple click of a button. Release notices can then be automatically sent to targeted custodians, simplifying administration.

**Custodian Portal:** Custodians have access to individual portals that summarize their active, pending, and released holds in a single view, enabling them to easily track all their legal obligations in one place.

**Custodian Survey:** Surveys containing single-choice, multiple-choice, or free form text questions can be created and issued to key custodians so administrators can easily capture information critical to a case, thereby expediting the interview process. Surveys can also be saved as templates to the Notice Library and reused.



**Custodian Survey:** Easily create custodian surveys to capture important information about a case

**Survey Response Report:** Survey responses are automatically captured and immediately available for analysis both in a summarized format and by individual custodian via easy-to-read charts and graphs.

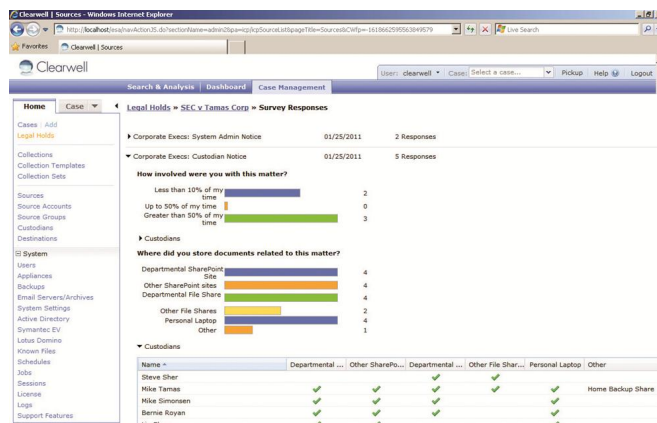
**Active Directory Integration:** Custodians can be dynamically populated into Clearwell from Microsoft Active Directory®. Employees purged from Active Directory are still retained in Clearwell as custodians, ensuring a defensible record of all legal hold activity.

**Custodian Audit Report:** Every legal hold action, such as hold notice, response, confirmation, escalation, and release,

is tracked and available via an exportable report, creating a complete and detailed audit trail.

**Distributed, Access-based Architecture:** Legal hold responses can be routed to a separate server that provides access to all custodians, ensuring that the primary Clearwell server is accessed by designated legal and IT users only.

**Seamless Integration with Downstream eDiscovery Processes:** The Clearwell Legal Hold Module is part of the Clearwell eDiscovery Platform, delivering a single product for the entire eDiscovery lifecycle. Users can issue legal holds, and then collect, process, analyze, and review case data all within the same application, ensuring a defensible eDiscovery process.



**Survey Response Report:** Immediately analyze custodian information in a summarized format by individual custodian

## Enterprise Vault and the Clearwell eDiscovery Platform

Together, Enterprise Vault, Enterprise Vault Discovery Accelerator and the Clearwell eDiscovery Platform bring a new level of information governance and end-to-end eDiscovery. Symantec Enterprise Vault™ is an archiving platform that helps bridge the gap between business, legal, and IT requirements by enabling an eDiscovery-optimized infrastructure based on intelligent information management. Enterprise Vault helps organizations reduce search and review time from weeks and months to just days or hours, enabling legal counsel and compliance teams to make faster, more insightful legal strategy decisions."

### More Information

Visit our website

<http://www.symantec.com/clearwell>

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