

PRODUCT OVERVIEW

OpenText Legal Hold

Minimize risks and drive efficient, defensible legal hold and preservation activities



Automate legal hold to reduce time and effort



Minimize risk and costly mistakes from manual processes



Support investigations with timely preservation of relevant information

Legal holds arise from the duty to preserve information that may be relevant for pending or reasonably anticipated litigation. Company employees, as well as the organization itself, must suspend retention policies to preserve information under their care, custody, or control while the hold is in place. Many organizations struggle with manual, decentralized processes driven by email or spreadsheets that are risky and time-consuming.

OpenText™ Legal Hold is a simple, powerful cloud-based solution that helps legal, HR, compliance, and IT teams centralize legal hold management. This reduces the complexity and risks associated with holds and data preservation efforts.

OpenText Legal Hold is quickly deployed through a secure cloud environment, with no hardware or software to purchase, manage, or maintain. The solution automates key mechanics of defensible preservation and uses proven expert workflows for every stage of the process from inception of a hold to case closure.



Automate legal hold to reduce time and effort

Sending legal hold notices via templates from a central application that automatically tracks acknowledgements reduces the time required to issue and track compliance with new legal holds from hours to minutes.

Automated questionnaires save additional time while improving the depth of insight about the types of data relevant to the legal hold and where it is stored. Retraction notices are automatically sent when matters are closed and custodians need to be informed that their duty to preserve data has ended.

Decrease risk through automation

Automation reduces the risk of inadvertent data spoliation due to errors and mistakes inherent in manual processes. Integration with common systems reduces risk further by rigorously managing custodians and speedily locating relevant data. Automating in-place preservation ensures seamless collaboration between legal, IT, compliance, and HR teams.

Microsoft® Active Directory® integration for automated custodian management

OpenText Legal Hold Custodian Sync with Active Directory reduces risk by ensuring that custodian profiles are up to date, allowing efficient execution of accurate, inclusive legal hold workflows. Custodian profiles including attributes like employee status, title, location and department are also reportable.

Microsoft 365® integration for in-place data preservation

OpenText Legal Hold helps organizations mitigate the risk of inadvertent spoliation of potentially relevant data by automating in-place preservation of Microsoft 365 mailboxes. Routine deletion policies within native data sources are suspended with customizable rules to establish and meet requirements. This simple integration saves time for both legal and IT teams, circumventing the need for costly collections at the preservation phase.

HR application and IT ticketing system integration for employee change management

Integrating OpenText Legal Hold with common HR applications mitigates the risk of evidence destruction when employees exit the organization. OpenText Legal Hold Exiting Employee Supervisor helps maintain legal hold obligations through automated detection of departed employees subject to legal holds. When status changes are detected, the system automatically alerts department teams to execute preservation protocols.

OpenText Legal Hold also integrates with asset management systems to identify corporate assets, such as laptops and smartphones held by departing employees. This reduces the risk of accidental data deletion from recovered devices.

Streamline investigations by quickly finding relevant information

Automated custodian management and questionnaires enable faster responses to regulators and/or internal investigators by helping to itemize relevant information, its owners, and locations.

Silent holds empower administrators to place data on legal hold without advising custodians that an investigation is underway. Critical data can be protected before it is accidentally or willfully moved, altered, or destroyed.



OpenText Legal Hold provides rich notification functionality for centralizing and managing legal holds, reducing risk and alleviating the burden of manual processes at a fraction of the cost of other available legal hold solutions. As it is deployed quickly via the cloud, teams can be up and running within days.

Product features

| Feature | Description |
|--|---|
| Legal holds issuance and tracking | <ul style="list-style-type: none"> • Create and distribute hold notices in minutes. • Track acknowledgements. • Schedule and send automated reminders. |
| Integration and synchronization with IT and HR systems | <ul style="list-style-type: none"> • Connect to corporate systems, including internal email, HR applications, and Microsoft® 365®. • Make custodian selection and legal hold issuance simple and straightforward. • No agents to install or manage. |
| Employee questionnaires | <ul style="list-style-type: none"> • Create and manage web-based employee interviews with suggested expert questions, templates, and control tracking. • Notify and survey key employees to gather important information to identify relevant data sources and records. • Identify custodians, data sources, and involved parties. • Leverage responses as part of a greater legal, security, or records management strategy. |
| Automate enterprise preservation | <ul style="list-style-type: none"> • Automate IT task suspensions in accordance with email and data retention policies. • Prevent inadvertent or deliberate spoliation. • Preserve emails and files for exiting or departed employees. |
| Expert processes | <ul style="list-style-type: none"> • Wizard-style screens for users and administrators to quickly configure workflows and options. • Highly flexible and configurable to meet business requirements. • Expert suggestions in the form of protocols, configurations, and workflow to accommodate many different legal scenarios. |
| Defensible tracking and audit trails | <ul style="list-style-type: none"> • Complete tracking and audit trails for every action to ensure defensibility of process, from initial notices through closing the legal hold. • Real-time updates via a web-based dashboard give users access to immediate information as well as details about legal risk and related processes. |
| Legal hold dashboards | <ul style="list-style-type: none"> • Log in to check the status of employee legal hold and preservation obligations for a single hold or across multiple holds. |

| Feature | Description |
|---------------|---|
| Proxy notices | <ul style="list-style-type: none"> • Enable executive assistants and administrators to acknowledge and manage legal holds on behalf of custodians. |
| Silent holds | <ul style="list-style-type: none"> • Data preservation workflows to secure data necessary for internal and external investigations without informing custodians, mitigating the potential willful destruction of evidence. |
| Data security | <ul style="list-style-type: none"> • Safeguard evidentiary integrity of preserved documents and data sources with encryption and digital chain-of-custody. • Ensure security and privacy at all times with enforcement mechanisms that protect sensitive company information. |
| Reports | <ul style="list-style-type: none"> • Download and view reports related to matters and legal holds to provide a comprehensive list of custodian data. |

[OpenText Legal Hold product page](#)

[OpenText Legal Hold integration services overview](#)

[Why in-place preservation is critical to the litigation hold process](#)

[End the risk and effort of spreadsheets for managing legal holds](#)



About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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