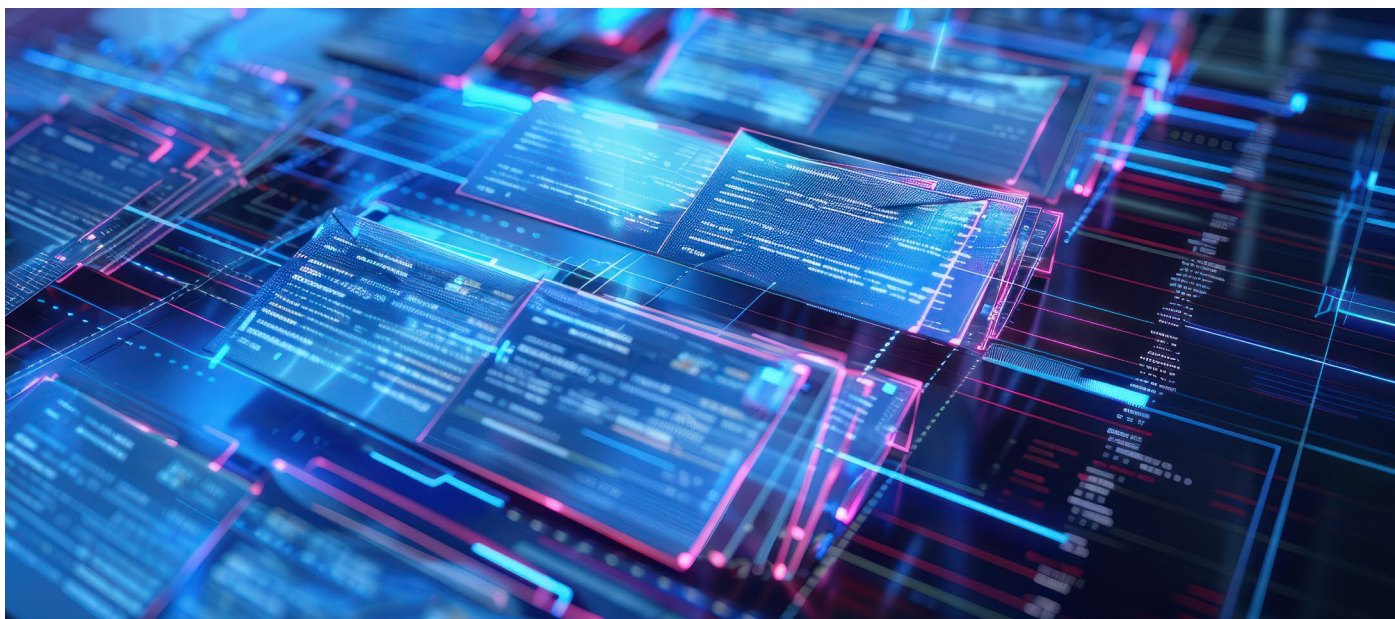


5 key steps to implement OpenText Core Legal Hold

Start benefiting from automated legal hold in weeks, not months or even years, with these easy implementation steps



Benefits

- Minimize risk and eliminate costly mistakes with proven, defensible legal hold technology
- Increase efficiency with automation
- Apply expert workflows designed to support the duty to preserve
- Reduce costs with cloud deployment that eliminates IT CapEx

OpenText™ Core 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.

Feature	Description
Site setup	Following a scoping call to understand specific requirements and connectivity needs, users relay specific setup options to ensure compatibility with other systems. Using this information, OpenText creates and provisions the legal hold site.
Custodian sync	OpenText will import custodians to the OpenText Core Legal Hold site by facilitating synchronization with the corporate employee directory, such as Active Directory, Workday, or other such systems. OpenText will work collaboratively with IT and legal teams to facilitate the integration and synchronization via APIs and Windows PowerShell scripts.

Resources

OpenText Core Legal Hold Webpage

[Visit the webpage ›](#)

OpenText Core Legal Hold Overview

[Read the overview ›](#)

Feature	Description
Legal Hold Imports	Existing legal holds from your legacy system or workflow can be imported into OpenText Core Legal Hold. OpenText will provide a suggested workflow and template along with necessary guidance on importing hold information so users can begin to use the platform immediately for all holds and discontinue prior methods.
Systems integration	OpenText Core Legal Hold is easily integrated with enterprise systems to securely push or pull custodian data from or to the site. Users completely control the process and decide how data is integrated. OpenText will provide Windows PowerShell scripts or REST APIs to synchronize legal hold data with systems like Microsoft® 365 or IT ticketing systems to optimize interdepartmental legal hold activities.
Training	OpenText will provide training for your organization's system administrator that covers logging in, user management and group permissions, folder and matter organization, and template creation. Overview and navigation training will be provided for primary OpenText Core Legal Hold users, covering sending legal holds, using templates, adding custodians, creating questionnaires, post-sending actions and reporting.