**opentext™**

DATA SHEET

# 5 key steps to implementing OpenText Legal Hold

Start benefiting from automated legal hold and collection in weeks, not months or even years, with these easy, low IT resource implementation steps.

**Minimize risk and eliminate costly mistakes** with proven, defensible legal hold technology used in 45+ countries

**Increase efficiency** with automation

**Apply expert workflows** designed to meet specific legal requirements

**Reduce costs with cloud deployment,** elimination of IT CapEx and flat-fee licenses

→ Learn more

OpenText Legal Hold Web Page »

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OpenText™ Legal Hold is a simple, powerful cloud-based legal hold and preservation platform that helps law departments comply with legal hold obligations, be more efficient and automate time-consuming and risky manual processes.

| Feature | Description |
|---|---|
| Site set up | Following a scoping call to understand specific requirements and connectivity needs, users fill out a form to select set up options and ensure compatibility with other systems. Based on this information, OpenText will take care of the basic back-end configurations. |
| Custodian sync | In this phase, OpenText will help import custodians to the Legal Hold site by facilitating synchronization with corporate directory services, such as Active Directory, or other systems in which custodian information is already stored. This process begins with a webpage that contains sample scripts to help facilitate the integration and sync. |
| Legal Hold migration | If your organization uses legacy hold tools, spreadsheets or other methods for existing legal holds, OpenText will provide a legal hold migration template to organize existing holds and import them quickly into the Legal Hold site. Users can begin using Legal Hold immediately for all holds—there is no need to continue using legacy systems at the same time. |
| Systems integration | Legal Hold can be integrated easily with enterprise systems to securely push custodian data to the Legal Hold site. Users completely control the process and decide how data is integrated. OpenText will provide Windows PowerShell scripts or REST API's to push and synchronize HR directory data into Legal Hold. |
| Training | OpenText will work with a designated administrator from your organization as the internal go-to person for user training and quick support, customized for the company's specific needs. OpenText will also conduct full training for the organization's legal and IT users who need to access the application. |

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