

Legal Hold 2.0 Release Notes

As part of Legal Hold 2.0 release, we have introduced some key features to help simplify the Legal Hold creation process and improve workflows for Legal Hold Users.

What's New?

Usability Enhancements

Legal Hold Creation Enhancements

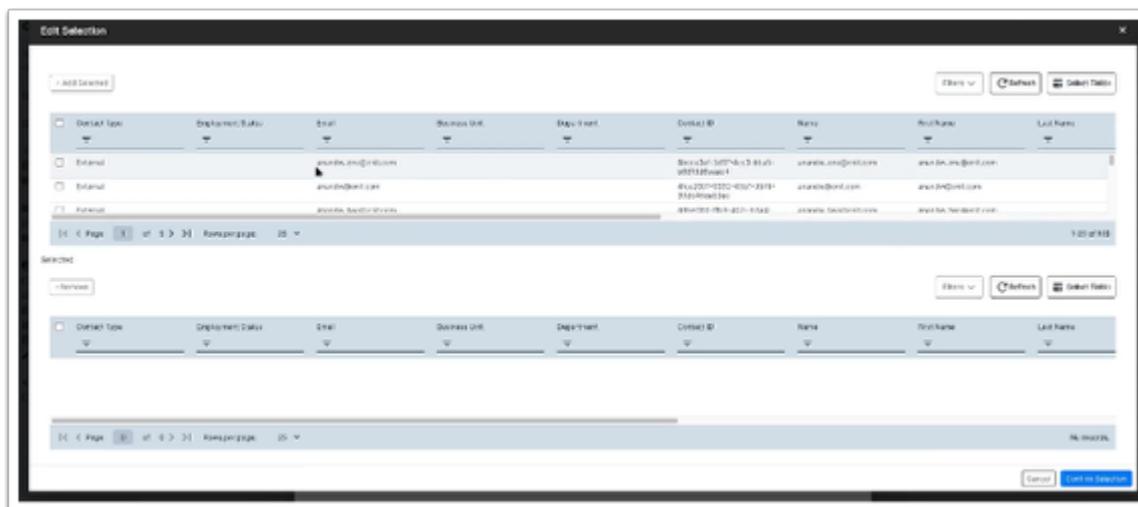
- Legal Hold creation has been simplified to allow users to create and assign data to the Legal Hold in one action, making it easier to find related hold data.
- Users have the option to set Silent Notifications at the Legal Hold level by selecting the Silent Hold option.
 - Users also have the option to set Silent Notification at the Custodian level as well. This will allow for a single hold to be created which has both Silent and Regular custodians included.
 - Silent Custodians will not receive any emails or notifications around the hold.
 - Regular Custodians will receive the regular notifications assigned to the hold.
- Legal Hold creation no longer displays a Due Date field, though it can be configured to include that if desired.
- Users can now select to Send Survey with Hold Notice during Legal Hold creation.
 - If selected, it will automatically select the default Survey associated with that Legal Hold Type as the Custodian Questionnaire, but users can change that selection if needed.
- When copying from an existing Legal Hold, users can now choose to copy Custodians, Surveys, and/or Notices through a multi-selection dropdown.
 - Copying Surveys or Notices from an existing Legal Hold will override the default selections from the Legal Hold Type.
 - When users choose to copy these options from an existing Legal Hold, previously selected items will disappear to reduce potential confusion about what is being selected.
- Once the user completes their choices and selects Submit, Legal Hold proceeds directly to the Hold Guide to complete the Legal Hold creation process.

The screenshot displays the 'Legal Holds' interface for creating a new hold. The form includes the following fields and options:

- Hold Name:** Demo
- Status:** Jay vs Dennis
- Legal Hold Type:** Employment Litigation
- Hold Start Date:** 6/14/2022
- Send Survey With Hold Notice?:** Yes
- Custodian Questionnaire:** Employment Litigation Survey
- Copy Details from Existing Hold:** Checked
- Select Legal Hold:** 233msh0202
- Copy Custodians Count:** The selected Legal Hold has 1 custodian
- Select to Copy:** Copy Custodians, Copy Notice
- Private:** Unchecked
- Silent Hold:** Unchecked

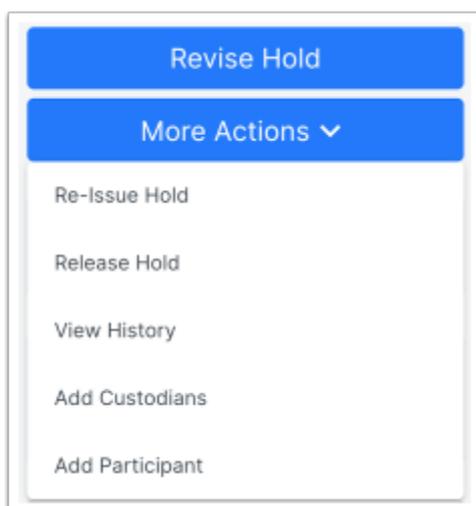
Custodian Selection Enhancement

- Users can now select Individual Custodians to add to a Legal Hold using a multiselect grid instead of a dropdown list.
- Users can filter by multiple desired fields to limit the list of Custodians from which to select.
- Users can select multiple Custodians at once and select the “Add Selected” button which will make the Custodians appear in the Selected Group.
- Users will then select “Confirm Selection” to proceed.
- Users can still add Custodians in other manners and Preview the Custodians that have been added.

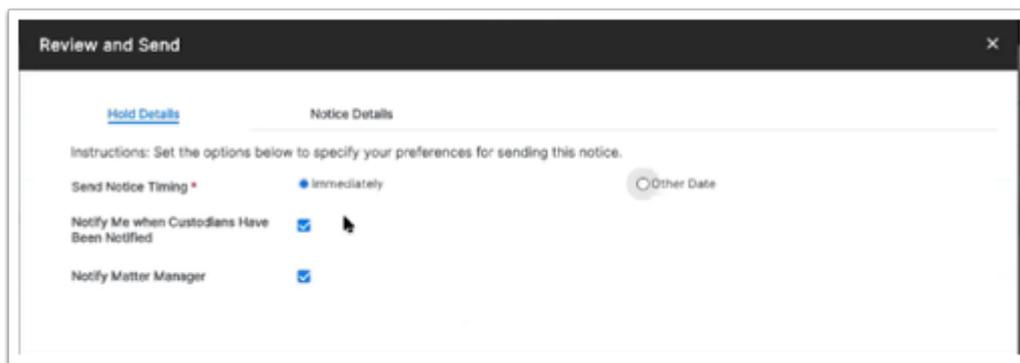


Additional Usability Enhancements

- A new Add Custodians option is available when a Legal Hold Manager only needs to add custodians to an existing Legal Hold. This is available from the More Actions Menu and allows for custodians to be added without revising the hold.



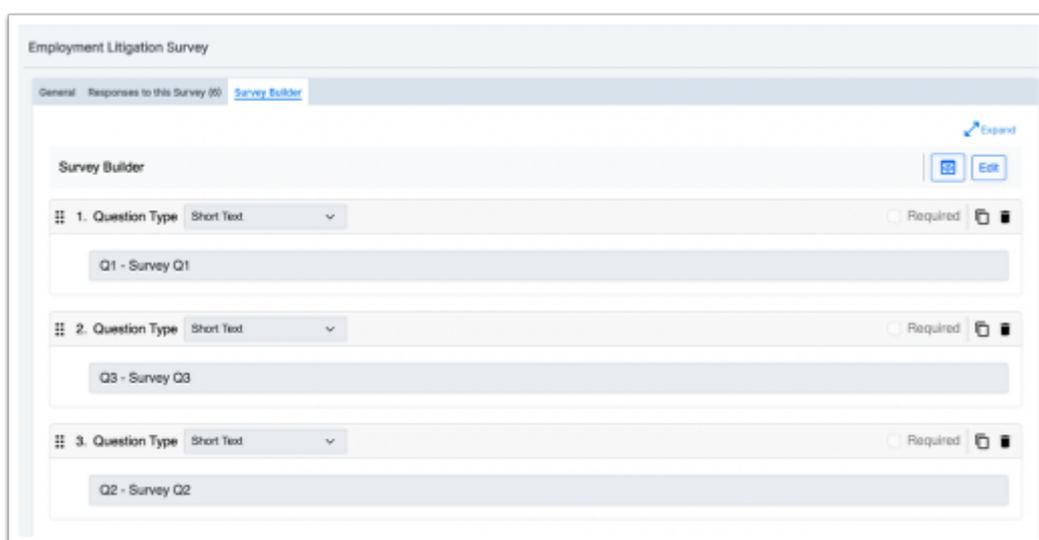
- The 3rd step of the Legal Hold Guide now includes the ability to Review the Hold Details and Notice before sending. This Review step is no longer optional to ensure that the hold is being sent out exactly as expected.



New Features

Survey Builder

- Users can now find the status of responses to the Survey and customize the Survey for their Legal Hold by clicking on the Survey link in the Legal Hold.
- Selecting the Survey Builder link allows the user to review the current survey associated with the Legal Hold and edit it to add questions or change existing questions.



Survey Response Report

- Users can now view detailed Custodian Responses to Surveys on the Survey Responses tab.
- These responses can be filtered by Custodian Name, Survey Name, Question, or Answer for easy navigation.
- The response data can also be exported if desired.

LH E2E Test 4

Legal Hold Type: Employment Litigation Matter: Roop Matter Matter Manager: John Gilma Open Date: 04/08/2022

Hold Guide Correspondence (1) **Survey Responses (3)** Survey (1) Log (9)

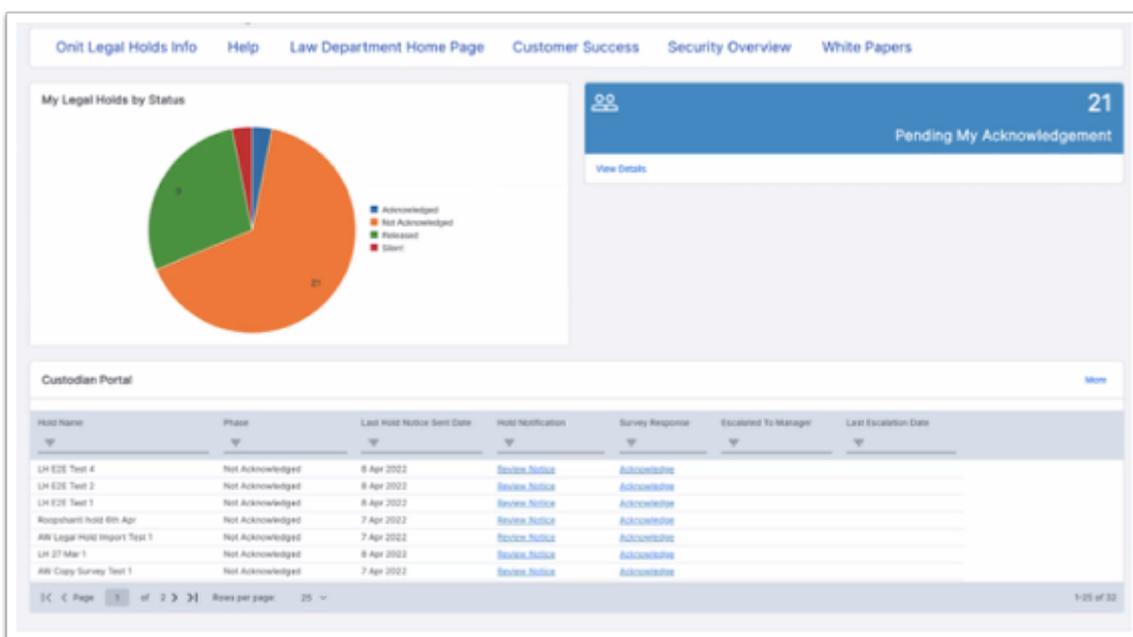
Actions ▾ Filter type: Simple Advanced Filters ▾ Refresh Export ▾ Select Fields

<input type="checkbox"/>	Custodian Name	Survey Name	Question Text	Answer
Custodian Name: Chris Fields (3 Items)				
<input type="checkbox"/>	Chris Fields	Employment Litigation Survey	Q3 - Survey Q3	Demo Answer 2
<input type="checkbox"/>	Chris Fields	Employment Litigation Survey	Q1 - Survey Q1	Demo Answer 1
<input type="checkbox"/>	Chris Fields	Employment Litigation Survey	Q2 - Survey Q2	Demo Answer 3

< Page 1 of 1 > | Rows per page: 200 | 1-3 of 3

Custodian Dashboard

- Custodians who are users in the Legal Hold tool can login and see a summary of their Legal Holds and how many are still Pending their Acknowledgement.
- Users can filter by Hold Name, Phase, Last Hold Notice Sent Date, Hold Notification and Survey Response to find the Legal Hold they need.
- Custodians can click on the Review Notice or Acknowledge links for any Legal Hold to respond to those notifications directly.



Known Defects

- In the Custodian Portal, there is an unnecessary link that could allow the Custodian user to release themselves from the hold or change their notification settings even if they are not an admin.
 - This will be addressed prior to releasing the product to a production environment.