

OnitX Legal Holds Management 3.2 Release Notes

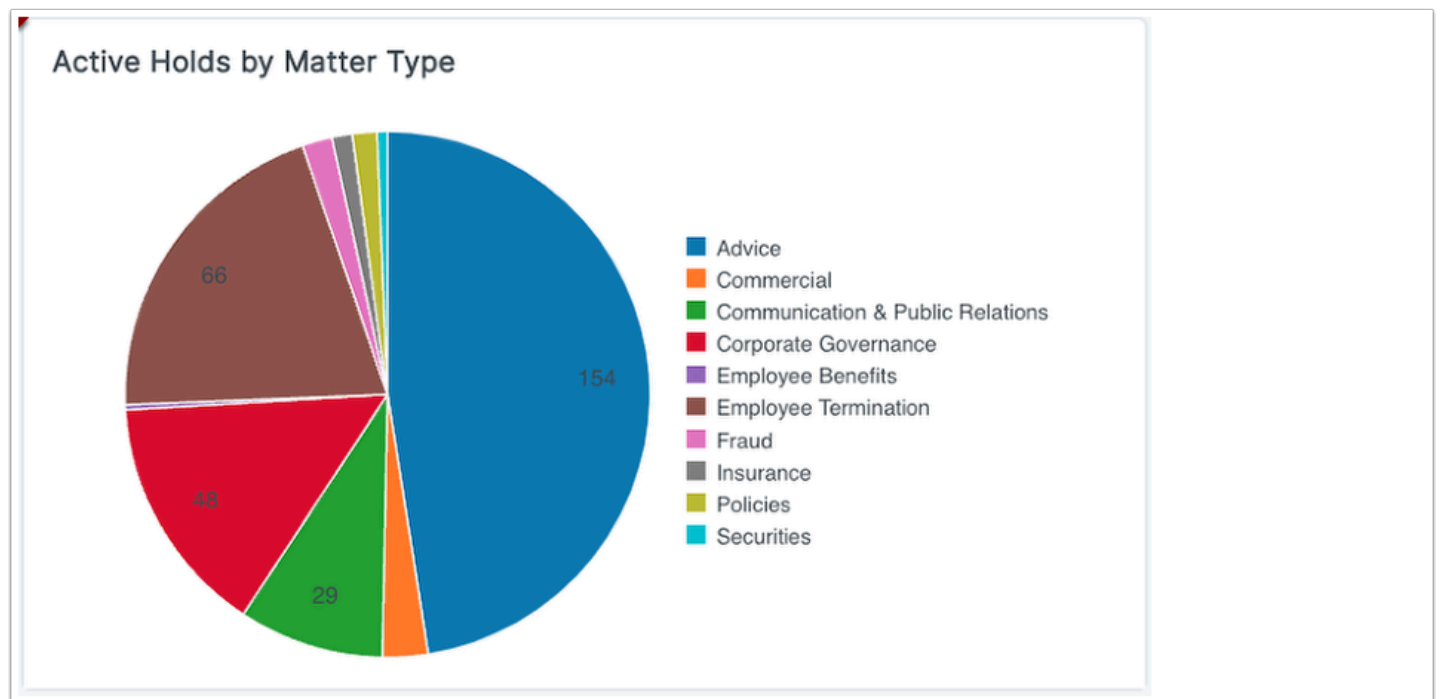
As part of the Legal Holds Management 3.2 release, we have introduced some key features to allow more customization within the Legal Hold Creation and Survey Creation workflows and have increased and improved the options available on the Legal Hold Dashboard.

What's New?

New Features

New Legal Hold Dashboard Charts and Graphs

- See a breakdown of the Legal Holds by Matter Type
 - When the Legal Holds integration is paired with Onitx Matter Management, users will now see a pie chart of Legal Holds broken down by Matter Type.



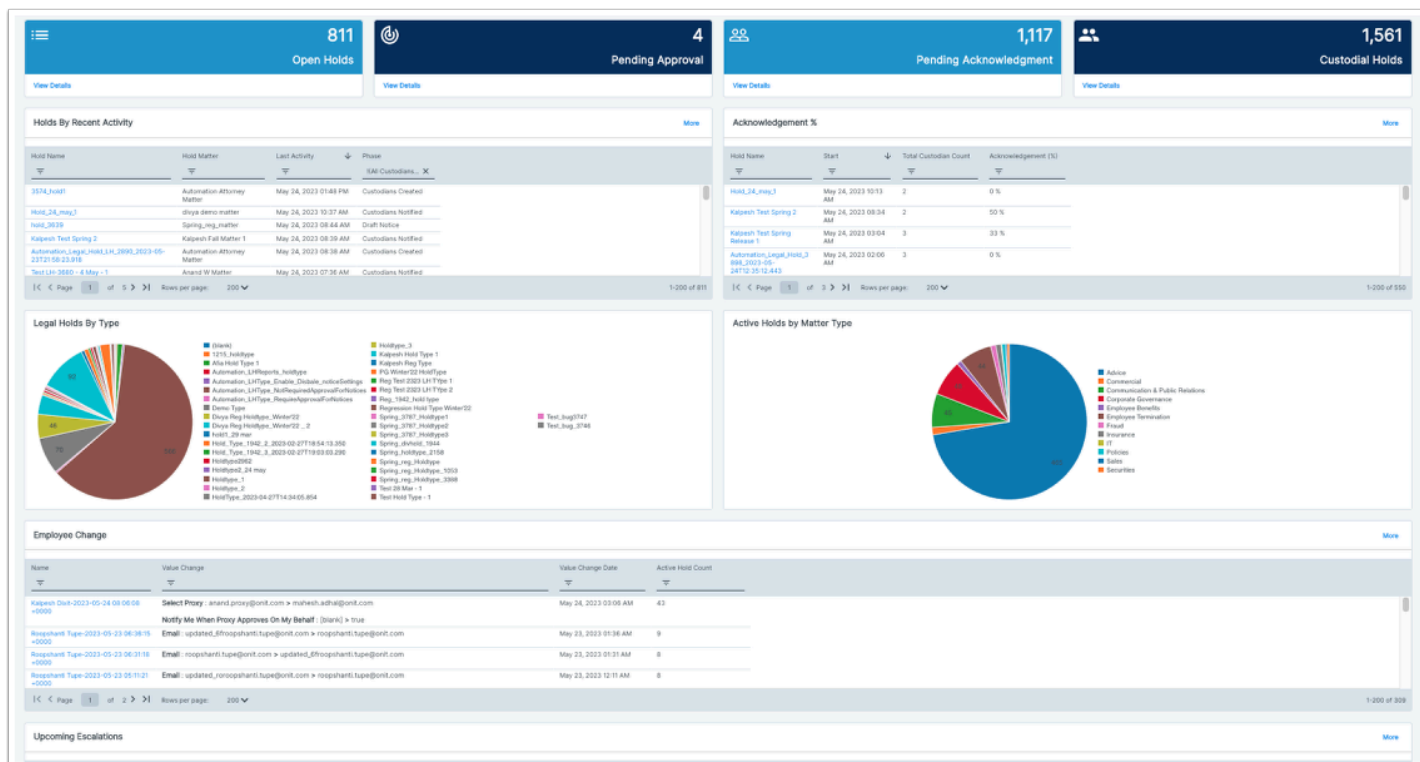
- See which Custodians have Escalations that will be triggered soon.
 - Users can now see which Custodians have failed to respond to Legal Holds long enough that an escalation message will soon be sent to their manager in the new Upcoming Escalations widget on the dashboard.
 - This allows the legal team a chance to proactively reach out to those Custodians to avoid having their managers involved.
 - Users can adjust the Upcoming Escalation Date filter to focus on the upcoming escalation date range of their choice.

Upcoming Escalations More		
Custodian	Hold Name	Upcoming Escalation Date
		7 days after today
Alicent Smith	Hold5_April	Apr 6, 2023
Akshay Kumar	Hold5_April	Apr 6, 2023
jennifer Lewis	Test Survey Response 3 Apr - 1	Apr 11, 2023
jennifer Lewis	Hold_3_April	Apr 6, 2023
joy@proxy.com	Hold_3_April	Apr 6, 2023
Akshay Kumar	Holdtest_30march_3	Apr 7, 2023

- Quickly see any preservation issues across all Legal Holds
 - Administrative users can now see a listing of any Legal Holds in their environment where preservation failed on any Custodian.
 - The Preservation in Place Failures widget provides the full list of any Custodians that failed to be preserved as well as the Legal Hold affected by that failure so that the administrative user can take the appropriate action to correct the issue.
 - The Preservation in Place Failures widget also includes any errors that occurred when attempting to stop preservation of a Custodian's data.

Preservation in Place Failures More					
Preservation System	Request Type	Custodian List	Un-preserved Custodians	Legal Hold	Request Execution Result
Microsoft	Remove Hold from Mailbox	lhtestuser1@onit.gold		Hold1_26April_MS	Preservation can not be stopped because Custodian is still on Active Legal Holds.
Microsoft	Remove Hold from Mailbox	lhtestuser3@onit.gold		Hold1_26April_MS	Preservation can not be stopped because Custodian is still on Active Legal Holds.
Google	Start Preservation	user3@onit.zone alex@onit.com	alex@onit.com	Hold2_26April_Google	Hold2_26April_Google - fail Preservation can not be stopped because Custodian is still on Active Legal Holds.
Slack	Start Preservation	divyanka.sangle@onit.com alcent_smith@onit.com	alcent_smith@onit.com	Hold1_26April_Slack	Hold1_26April_Slack - failed to Preserve all custodians.

- Provide the right dashboard for the right user
 - The Legal Hold Dashboard is now configured based on the users role and optimized to make the best use of space.
 - Standard users will no longer see administrative widgets like Email Failures and Hold Digest Sent Date.
 - Administrative users will benefit from the new Preservation in Place Failures widget while also seeing the full dashboard available to standard users.
 - The widgets for Holds By Recent Activity and Acknowledgement % have been modified to include more information and made to fit on the same row.



Usability Enhancements

Adding an Approval Step for Silent Holds

- Send a Silent Hold out for Review
 - Even though Silent Holds do not have a notification step, users can now send the hold for approval before completing the hold.
 - This feature must be enabled in the Legal Hold Settings by selecting the checkbox for "Allow Preview of Silent Holds" under the Silent Holds Settings.

Silent Holds Settings

☒ Allow Preview of Silent Holds

- Once the preview setting is enabled, Legal Hold Admin will now have a "Create Hold" option that can be selected to manually start the legal hold once any requested reviewers have Previewed the Custodians and approved the hold.

Silent Hold

Legal Hold Type: [Demo Type](#) Matter: [Jay v Demos](#) Matter Manager: Sam Toward Open Date: 05/25/2023 Is Silent: Yes [Edit This Hold](#)

[Hold Guide](#) Preview Custodians (1) Log (2)

Step 1: Select Custodians
Select the custodians you need to notify about this hold.
In Progress

Step 2: Draft Notice
Create, Select, or Edit Hold Notices to be sent to custodians.
... Not Started

Step 3: Review and Send
Final Hold information should be reviewed to ensure the hold data is correct. Changes can still be made here, but not past this phase.
... Not Started

Step 4: Hold In Progress
Track custodian acknowledgements, responses on surveys, send reminders, escalations and view Hold data.
... Not Started

Phase: Select Custodians ▾

[Create Hold](#)

[More Actions ▾](#)

Post comment...

Activity
No Activity

Participants

- [admin@new-ing](#) - Requester
- [Sam Toward](#) - Matter Manager

Survey Enhancements

- Include a survey question with just one answer
 - Matter Managers can now use the multi-select survey question option to add questions that have only one answer so the Custodian can just check a box to acknowledge the question.
 - This causes the Custodian to acknowledge the statement of the question before proceeding with the rest of the questionnaire.

2. Question Type **Multi Select** ☐ Required [Copy](#) [Delete](#)

Would you be happier with a single choice question?

☒ Yes ☐ No [Copy](#) [Delete](#)

[+ Add option](#) [+ Add other](#)

- Matter Managers can now also see Survey Responses sorted in a way that presents the nested relationships of the Survey by sorting on the Display Order Tree column.

<input type="checkbox"/>	Custodian Name	Survey Name	Question Text	Answer	Display Order Tree ↑
	☰	☰	☰	☰	☰
Custodian Name: Peter Dury (6 Items)					
<input type="checkbox"/>	Peter Dury	Kalpesh Test Survey 1	What is your Name	John	2
<input type="checkbox"/>	Peter Dury	Kalpesh Test Survey 1	Are you employee of Onit?	Yes	3
<input type="checkbox"/>	Peter Dury	Kalpesh Test Survey 1	Year of Joining	2020 - 2023	3.a.1
<input type="checkbox"/>	Peter Dury	Kalpesh Test Survey 1	Which Year	2023	3.a.1.b.1
<input type="checkbox"/>	Peter Dury	Kalpesh Test Survey 1	Where do you store the Data?	["Here"]	4
<input type="checkbox"/>	Peter Dury	Kalpesh Test Survey 1	Where	Here	4.e.1
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Custodian Dashboard Enhancements

- Acknowledge Notifications immediately after review
 - Custodians can now acknowledge their Notifications on the Review Notification page rather than having to separately select the Acknowledgment page.

Acknowledge

Correspondence


Subject: Initial Template for Demo 20230316 sent to Peter Dury

You are receiving this notice because you are marked as a proxy for Peter Dury.

Dear *Peter Dury*,

You have been officially put on hold for Hold Demo 20230316 which was started at 2023-03-16. The good news is that this means you get to view the new colors available with this latest release of Legal Hold.

Thank you for taking the time to read this.



Attachment:[onit-blue.png](#)

Reporting Enhancements

- Know when Custodians get added to Legal Holds
 - Custodians on Hold Report Grid now includes additional fields to show what time the hold started and when the notification was sent to the Custodian to better display when Custodians are added to an existing hold.

- The regularly scheduled Custodian on Holds Report email includes these additional fields as well.
- See more details for Legal Holds
 - The Legal Holds Grid now includes a Public View for Active Holds that shows which holds have had custodians added or notified. This can be filtered by date to show how recently they were updated.
 - The Legal Holds Grid now includes fields regarding the matter including Area of Law.
 - The Legal Holds Grid no longer has redundant fields available to select in the Select Fields pick-list.
- Get additional Reporting
 - All relevant fields for Legal Hold applications are now available to be used by reporting and analytics.

Legal Hold Management Enhancements

- Delete what isn't needed anymore.
 - Legal Hold admin users can now delete Legal Holds that were drafted but never sent.

Known Defects

- Users may have to manually refresh the page after selecting "Edit Survey Response" button in order to edit their previous survey responses.
- The screen may refresh multiple times when saving changes to a survey.
- The Microsoft Preservation stopped message does not appear in the preservations log tab for some custodians when released from all legal holds, especially if that custodian had been previously restored to the legal hold.
- If custodians or matters are manually removed from Google Vault prior to releasing the custodian from the legal hold, then the preservations log will indicate the custodians failed to be released because the custodian is not found in Google Vault.
- When admin users add custodians to an existing legal hold without using the Revise Hold option, there is a potential for an error to occur if custodians are repeatedly added one by one and notices are sent each time using the more actions button.