

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

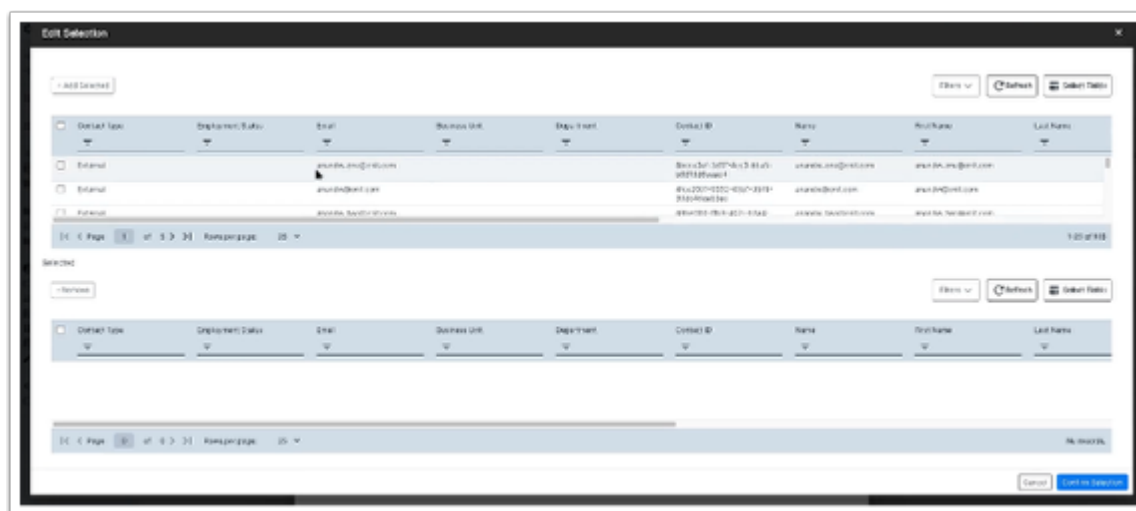
Legal Hold Creation Enhancements

- 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 shows a web form titled "Legal Holds" with a "Build Hold" link. The form is divided into two main sections. The top section contains fields for "Hold Name" (with a dropdown menu showing "Deena"), "Matter" (with a dropdown menu showing "Jay vs Deena"), "Legal Hold Type" (with a dropdown menu showing "Employment Litigation"), "Hold Start Date" (with a date picker showing "4/14/2022"), "Send Survey With Hold Notice?" (with radio buttons for "Yes" and "No", where "Yes" is selected), and "Custodian Questionnaire" (with a dropdown menu showing "Employment Litigation Survey"). The bottom section is titled "Copy Details from Existing Hold" and includes a "Select Legal Hold" dropdown menu showing "23marsh2022". Below this, it says "Copy Custodians Count" and "The selected Legal Hold has 1 custodian". There are two buttons: "Copy Custodians" and "Copy Notice". At the bottom, there is a "Select to Copy" dropdown menu and two checkboxes: "Private" and "Silent Hold".

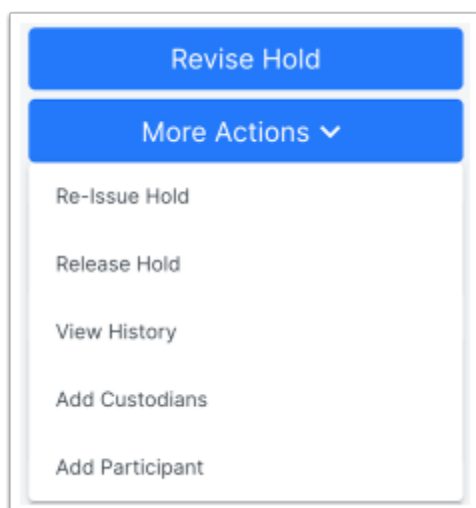
Custodian Selection Enhancement

- 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.

Review and Send

[Hold Details](#) Notice Details

Instructions: Set the options below to specify your preferences for sending this notice.

Send Notice Timing * ☒ Immediately ☐ Other Date

Notify Me when Custodians Have Been Notified ☒

Notify Matter Manager ☒

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.

Employment Litigation Survey

General Responses to this Survey (0) [Survey Builder](#)

Survey Builder [Expand](#) [Edit](#)

1. Question Type Short Text ☐ Required [Trash](#)

Q1 - Survey Q1

2. Question Type Short Text ☐ Required [Trash](#)

Q3 - Survey Q3

3. Question Type Short Text ☐ Required [Trash](#)

Q2 - Survey Q2

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 Glima	Open Date: 04/06/2022
Hold Guide Correspondence (1) Survey Responses (3) Survey (1) Log (9)			
<div> <div>Actions</div> <div> <div>Filter type</div> <div>Simple</div> <div>Advanced</div> <div>Filters</div> <div>Refresh</div> <div>Export</div> <div>Select Fields</div> </div> </div>			
<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
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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.

Onit Legal Holds Info

Help

Law Department Home Page

Customer Success

Security Overview

White Papers

My Legal Holds by Status

21

9

0

0

Acknowledged

Not Acknowledged

Released

Silent

21

Pending My Acknowledgement

View Details

Custodian Portal

Hold Name

Phase

Last Hold Notice Sent Date

Hold Notification

Survey Response

Escalated To Manager

Last Escalation Date

LH E2E Test 4

Not Acknowledged

8 Apr 2022

[Review Notice](#)

[Acknowledge](#)

LH E2E Test 2

Not Acknowledged

8 Apr 2022

[Review Notice](#)

[Acknowledge](#)

LH E2E Test 1

Not Acknowledged

8 Apr 2022

[Review Notice](#)

[Acknowledge](#)

Roopshanti Hold 6th Apr

Not Acknowledged

7 Apr 2022

[Review Notice](#)

[Acknowledge](#)

MR Legal Hold Import Test 1

Not Acknowledged

7 Apr 2022

[Review Notice](#)

[Acknowledge](#)

LH 27 Mar 1

Not Acknowledged

8 Apr 2022

[Review Notice](#)

[Acknowledge](#)

MR Copy Survey Test 1

Not Acknowledged

7 Apr 2022

[Review Notice](#)

[Acknowledge](#)

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Page 1 of 1

Rows per page: 25

1/25 of 22

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.