



HoldIT™ – Litigation Hold & Custodian Management Solution

Issuing, implementing, and supervising even one litigation hold is an administrative challenge; tracking multiple, often overlapping holds increases the complexity of complying with anti-spoliation legal duties. The right software solution will enable counsel to track each litigation hold from issuance and custodian acknowledgement through eventual rescission of the hold order – and can automate the process of providing legal teams with acknowledgement status and reminder notices to appropriate custodians. Perhaps most importantly, sound process-solutions demonstrate a good faith effort to meet anti-spoliation duties across the range of reasonably anticipated and active matters.

Introducing **HoldIT™** – the only litigation holds solution where you are in charge.

- ✓ **Compliant.** Audit reports track notification workflow and escalate non-acknowledgement in real-time.
- ✓ **Economical.** Web-based software as a service means you only pay for the compliance you need. Allocate costs internally across matters or budgets.
- ✓ **Easy.** With no software to install or maintain, you can qualify custodians, issue holds, automate notifications, and track compliance from day one.

HoldIT™ Product Features

Automate Notification Workflows

HoldIT™ enables legal teams to design, automate, and monitor notifications and acknowledgements based on the needs of a each case.

Design and issue holds notices to potential custodians

Track holds and acknowledgements across multiple custodians and matters

Qualify custodians using included **Vetta™** questionnaire functionality

Automate and customize preservation reminders

Escalate non-acknowledgement through system defined alerts

Access Real-Time Reports and Audits On-Demand

HoldIT™ provides intuitive, web-based dashboards with reporting options that enable counsel to track each legal hold from issuance and custodian acknowledgement through eventual rescission of the hold order.

Real-time reporting on:

- matters
- notification efforts
- custodian acknowledgements
- responses

Audit trail for changes to:

- hold notices
- notification processes
- custodians
- matter owners and key stakeholders
- hold rescission

Establish Organizational Collaboration

HoldIT™ role provisioning functionality allows groups within the organization and outside counsel to collaborate on the management of key custodians and retention of case essential documents.

Legal departments. Create team member roles and assign hold management privileges and responsibilities.

Outside counsel. Enable outside council to view hold status, collaborate on design of custodian questionnaires, and view acknowledgements and questionnaire responses.

Human Resources and IT department. Share visibility on employees and matters subject to litigation hold.

Receive Alerts on Process Compliance Milestones

HoldIT™ alert systems support anti-spoilation needs by automatically track and escalating for review key process milestones in notification and custodian qualification.

Alert systems actively monitor hold activities across a range of process milestones including:

- lack of acknowledgements
- impending hold expirations
- custodian responses to flagged issues

Our Benefits

Economical

Scalable costs match litigation volume.

CaseGuard users access services, on-demand, tailored to their litigation volume. Legal teams can choose to allocate the costs of compliance internally in a way that is defensible and transparent.

Unprecedented time-to-value.

Our applications deploy immediately – much faster than installation-required litigation holds offerings – with a total cost of ownership five to ten times less than with installed software.

Less expensive initially – and in the long-run.

CaseGuard solutions are provided pay-as-you-go. There are no heavy up-front costs or hidden expenses of maintenance and updates. With no software to install, you will always have the latest version.

Convenient

Accessible wherever you are. Device and location independence enable users to access our solutions using a web browser regardless of their location or what device they are using. As infrastructure is off-site and accessed via the Internet, users can securely connect from anywhere.

Easy on administrators. CaseGuard users can tailor notifications and access reports with the ease of navigating their favorite websites.

Compatible with your environment. We work in concert with your document management systems, leaving content within your corporate environment and security protocols. We leverage the ongoing investment of your IT security and avoid the need to review and recertify controls.

Dependable

Available. Our environments take advantage of server redundancy providing you with 99.9% uptime and disaster recovery.

Rigorously tested. Our products receive hundreds of hours of on-going testing with improvements delivered real-time and seamlessly to our customers.

Secure and confidential. Your information is protected by 128-bit SSL security. Data maintained and backed up in access-controlled, monitored Tier 1 data center.

About CaseGuard

CaseGuard specializes in providing intuitive, secure, and affordable litigation software solutions that allow customers to achieve efficiency and compliance from day one.

Each of our solutions is designed to address different needs, be flexible to match your actual litigation volume, and structured to allow legal teams to allocate cost of compliance across budgets, matters, departments or divisions.

Our mission at CaseGuard is not simply to deliver software, but to deliver real value – giving us the ability to offer our customers a true edge in eDiscovery compliance and litigation management with solutions that are accessible anytime and anywhere.

CaseGuard is a privately held corporation with its headquarters in Arlington, Virginia. Visit us on the web at: www.caseguardtech.com.