

Ascent ELM™

ELM Integrated Legal Hold

ENTERPRISE LEGAL MANAGEMENT

Manage the entire legal hold workflow between your team and all custodians. Simplify management using robust capabilities such as automated notification schedules, create and preview email notifications, and choose which custodians to communicate with. The fully-integrated Legal Hold Module in Ascent ELM™ takes the guesswork out of the workflow and ensures full compliance with every aspect of the legal hold process.

The comprehensive Legal Hold component is integrated with the Ascent ELM's Matter Management, providing seamless notifications, acknowledgments, surveys, and activity tracking. All Legal Hold information is available in real-time, indicating a complete status of the Legal Hold and all Custodian activity.

Integrate and manage all legal hold tasks within Ascent ELM™



- Create and schedule email notifications including initial notice and friendly reminders



- Send escalation emails to supervisors of unresponsive or non-compliant custodians



- Easily release a legal hold and track its activity throughout its lifecycle



- Communicate effectively with multiple groups of custodians

Ascent ELM™ Legal Hold delivers all-inclusive capabilities:

- Surveys, survey question libraries, and templates
- Automated notifications, escalations, and reminders
- Ad hoc and scheduled custodians activities, as well as activities for individual custodians
- Email notifications templates for initial, reminder, escalation, re-issue, and release content
- Flexible and configurable security for outside counsel access to initiate and maintain legal holds

View all Legal Hold status information at a glance:

Legal Hold ID	Legal Hold Name	Matter Name	Matter Number	Legal Hold Status	Total Custodian Count	# Active Custodians	# Notices Sent	# Notices Acknowledged	# Surveys Sent	# Surveys Completed	# Notices Escalated	Total Custodians	# Released Custodians
1023	Walden Co. Custodian	Director	401201	Issued	11/02/2015	0	0	0	0	0	0	0	0
1021	New Key Legal Hold	Smith v. Corp Client	100000	Issued	11/02/2015	10	10	1	10	1	0	10	0
22	Bruck Legal Hold	John Doe	200100	Issued	11/02/2015	5	5	1	5	1	0	5	0
20	Smith Legal Hold	Director	801201	Issued	11/02/2015	7	7	3	7	3	0	7	0
19	Conner Legal Hold	Director	801201	Issued	11/02/2015	5	5	2	5	2	0	5	0
17	Smith Escalated Legal Hold for Director	Director	801201	Issued	11/02/2015	0	0	0	0	0	0	0	0
16	Smith Legal Hold	Director L&L	200100	Issued	11/02/2015	200	200	100	0	0	0	200	0
12	Legal Hold Test with over 200 custodians	Director Investigation	200100	Issued	11/02/2015	200	200	100	0	0	0	200	0
10	Smith Escalation	Director	801201	Issued	11/02/2015	1	0	0	0	0	0	1	0
9	New Bruck Escalated Legal Hold	Bruck Escalated Matter Case	200100	Issued	11/02/2015	10	10	4	10	1	0	10	0
8	second test for case	John Doe v. United University Hospital	200100	Issued	11/02/2015	0	0	0	0	0	0	0	0
7	Test sample legal hold	John Doe v. State of Ohio	200100	Issued	11/02/2015	0	0	0	0	0	0	0	0

View all Custodian status information at a glance:

Custodian	First Name	Last Name	Business Email Address	Job Title	Start Date	Release	Compliance	Notes
John Doe	John	Doe	john.doe@doelegal.com	Director	11/02/2015 09:00 AM	03	Compliance	
Jane Smith	Jane	Smith	jane.smith@doelegal.com	Director	11/02/2015 09:00 AM	02	Compliance	
John Smith	John	Smith	john.smith@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
Jane Doe	Jane	Doe	jane.doe@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
John Doe	John	Doe	john.doe@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
Jane Smith	Jane	Smith	jane.smith@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
John Doe	John	Doe	john.doe@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
Jane Smith	Jane	Smith	jane.smith@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
John Doe	John	Doe	john.doe@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	
Jane Smith	Jane	Smith	jane.smith@doelegal.com	Director	11/02/2015 09:00 AM	01	Compliance	



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