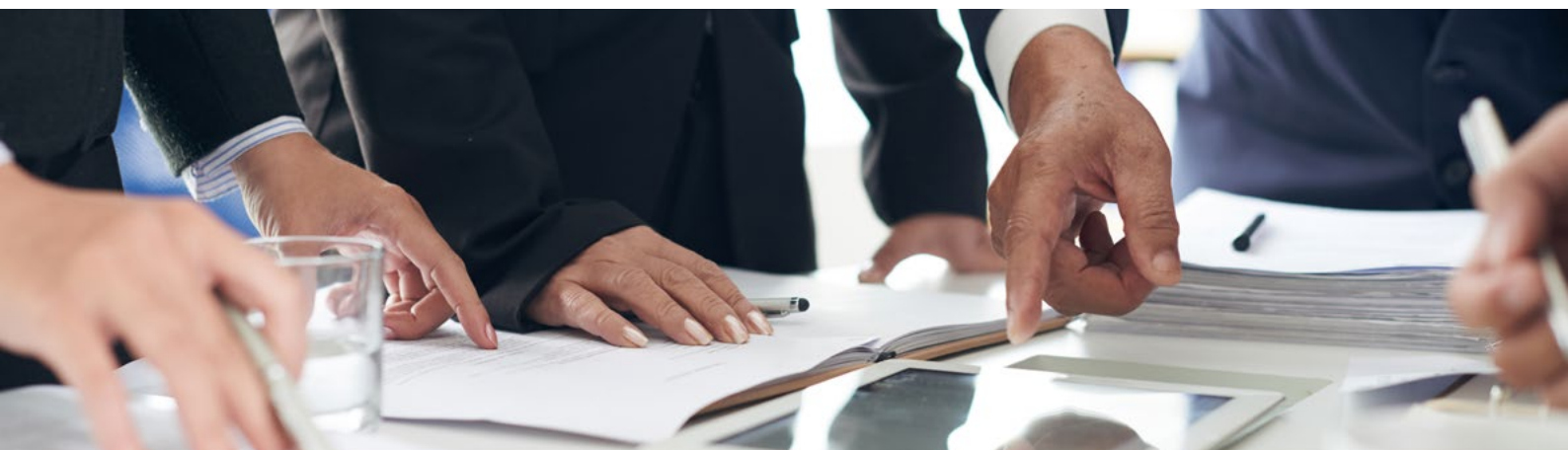


## SOLUTION OVERVIEW

# OpenText Legal Hold Integration Services

Save time, drive compliance, and prevent costly mistakes through simple integrations provided by a team of experts. Integrate with Active Directory, HR systems, Microsoft® O365® and other enterprise systems to automate legal hold workflows



**Save time with** automatic custodian profile creation and updating to drive an efficient legal hold process



**Reduce risk** by automating preservation workflow communication for exiting employees



**Prevent spoliation** by integrating with Microsoft O365 for in-place preservation

**Simple, secure integrations with your enterprise identity management, human resource, asset management, and enterprise content management systems automates legal hold workflows to save Legal and IT tremendous amounts of time and reduce the risk of accidental data deletion.**

Simple integrations supported by an expert Professional Services Team eliminates the time spent creating custodian profiles, mitigates potential communication gaps with IT and HR, and protects against accidental deletion of custodian data. OpenText™ Legal Hold, a cloud-based legal hold notification platform, integrates with Active Directory and HR systems to enable legal hold administrators to centrally manage auto-generated lists of custodians and auto-populated profiles. Integration also enables legal hold administrators to deploy workflows to transform employee change management into a reliable, repeatable, compliant and automated process. Integration with Microsoft O365 allows for content subject to a legal hold to be preserved in place within Microsoft O365 mailboxes, protecting against spoliation and simplifying alignment with corporate retention policies without the effort of managing a duplicate unsynchronized repository.

**Save time with automatic custodian profile creation and updating to drive an efficient legal hold process**

Automating legal hold workflows requires detailed, complete and consistent custodian profiles. OpenText Legal Hold's Custodian Sync with Active Directory and HR systems ensures that custodian profiles are up to date for the efficient execution of accurate legal hold workflows.

Additional benefits of integrating with Active Directory and HR systems include:

- Streamlined processes for automatically creating and maintaining custodian profiles;

📖 Legal Holds without the headaches (eBook)

📖 Practical guidance on managing legal holds white paper

- The ability to populate many custodian attributes including, employee status, title, location, and department – these attributes also become reportable; and
- Simplified migration from legacy or manual custodian tracking systems.

## Reduce risk by automating preservation workflow communication for exiting employees

Mitigate the risk of legal exposure when employees exit the organization. Interdepartmental communication with Legal, IT, and HR can fail or be cumbersome. Exiting Employee Supervisor helps to maintain legal hold obligations through automated detection of departed employees who are subject to legal holds. When status changes are detected, the system assesses custodians against the criteria within Legal Hold and the appropriate communications are sent to Legal, IT, Operations, and HR staff. This simple communication triggers department stakeholders to run their preservation protocols to make sure that the employee's data is appropriately preserved.

Legal Hold also integrates with asset management systems to identify corporate assets, such as laptops and smartphones held by departing employees to reduce the risk of accidental deletion of data subject to legal hold from recovered devices.

## Prevent spoliation by integrating with Microsoft O365 for in-place preservation

Mitigate the risk of inadvertent spoliation of legal hold content by automating in-place preservation of Microsoft O365 mailboxes. Deletion policies within the native data sources are suspended with customizable rules to anchor the preservation requirements. This simple integration saves valuable time for both Legal and IT stakeholders.

## Summary

Accurate, defensible, and efficient legal holds are optimized by tight integration between Legal Hold, Active Directory and HR systems. Other benefits include effectively reducing legal risk, automating employee change management, and avoiding having to maintain duplicate repositories of legal hold data through in-place preservation of Microsoft O365 mailboxes.

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## OpenText Legal Hold Integration Services

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- Office365
- Active Directory
- Workday
- PeopleSoft
- Other HR Systems
- ServiceNow (Other IT Ticket Systems)
- Single Sign On
- Thomson Reuters Legal Tracker
- Additional Enterprise Systems Upon Request

## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://www.opentext.com).

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