ELM Solutions

IBM® Atlas Legal Hold Connector for Passport®
An ELM Solutions Partner Program Offering

Connector Benefits

- Streamlines and integrates legal hold processes to improve efficiency and enforce compliance with discovery processes

- Reduces complexity of legal hold processes to mitigate risks and lower costs

- Allows legal staff to view and report on legal holds in the context of relevant matter and cost detail

- Enables Passport clients to leverage a best-in-class legal holds solution

"...enables bi-directional communication between Passport Legal Matter Management and IBM Atlas Policy Suite,..."

The management of legal holds is complex, time-consuming, and subject to strict due diligence requirements to ensure that data relevant to litigation is preserved and collected. The IBM Atlas Legal Hold Connector for Passport (Atlas Connector) tightly links a legal department's matter management and discovery management processes to improve efficiency and protect against the risks of mishandled legal holds. The connector brings together the industry-leading matter management capabilities of Passport with Atlas's best-in-class abilities to manage a rigorous and highly-defensible legal holds workflow.

The Atlas Connector enables bi-directional communication between Passport Legal Matter Management and IBM Atlas Policy Suite, which supports a comprehensive solution for management of legal holds. Key features provided by this connector include:

Automatic transfer of matter information from Passport to Atlas
- Key matter information is transmitted to Atlas in real-time when new or existing matters are flagged in Passport as subject to potential legal holds.
- Matters can be flagged for potential legal holds in two ways: end users can manually set this flag on a matter or clients can predefine a list of matter types for which this flag will automatically be set at matter creation.
- Passport generates a notification to alert a user (e.g., an e-discovery paralegal) when a matter is flagged for potential legal holds and requires review. This notification includes a link directly to the matter's record in Atlas.

Automatic transfer of legal hold information from Atlas to Passport
- Atlas is used to manage all legal hold maintenance, status information, notifications, and workflow. Summary-level legal hold and preservation request data that is tracked within Atlas is periodically transmitted back to the corresponding matter records in Passport (the frequency of these syncs is configurable by the client).
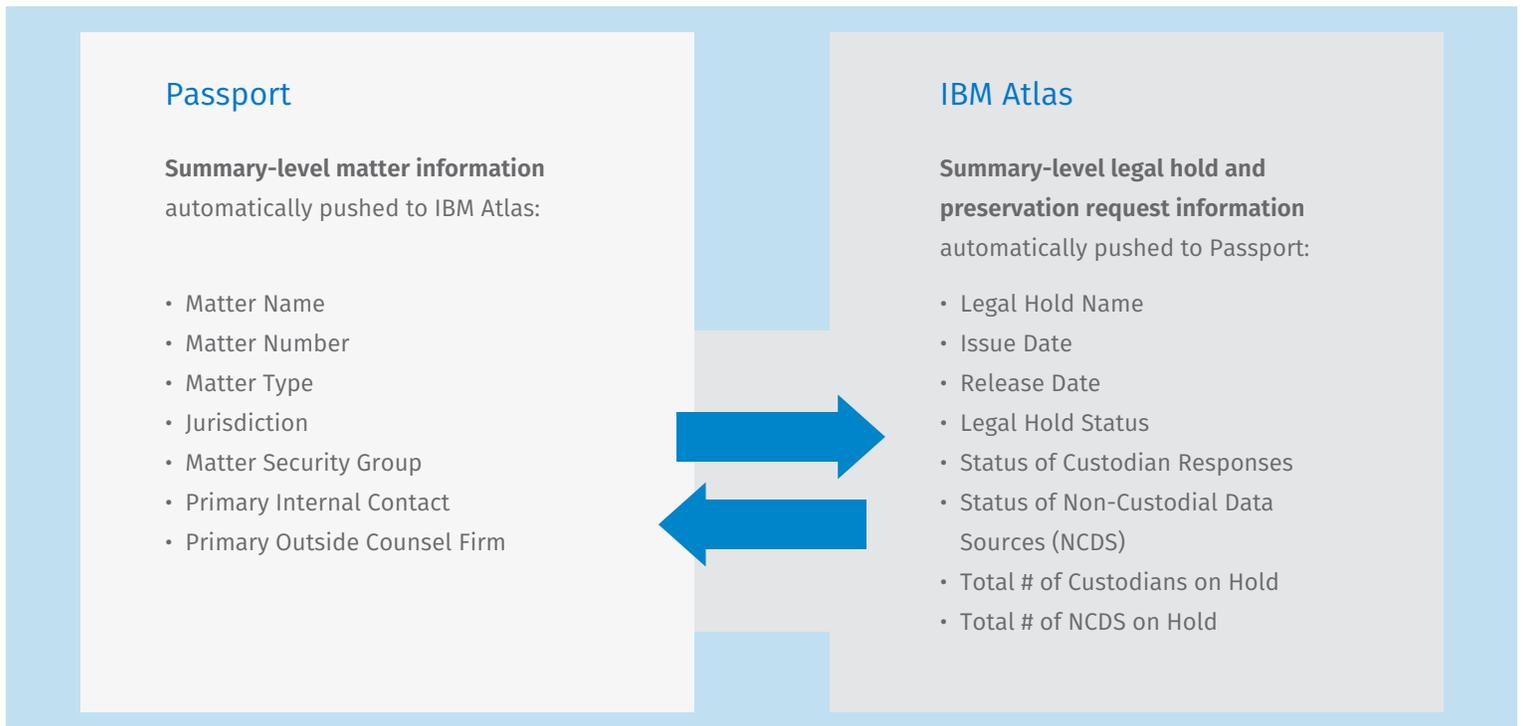
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Display and reporting of legal hold information within Passport

- The summary-level legal hold and preservation request data that is transmitted back from Atlas is stored in the Passport database. This data is available for read-only viewing on the Legal Hold tab of the matter detail page, providing a consolidated view within Passport of any legal holds that are pending against a matter.
- Should additional legal hold details be needed, users can link directly from a matter's Legal Hold tab in Passport to view the legal hold's record within the Atlas application.
- All summary-level legal hold and preservation request data that is stored in the Passport database can also be included in reporting and analytics generated using Passport business intelligence tools.

Passport

Summary-level matter information automatically pushed to IBM Atlas:

- Matter Name
- Matter Number
- Matter Type
- Jurisdiction
- Matter Security Group
- Primary Internal Contact
- Primary Outside Counsel Firm

IBM Atlas

Summary-level legal hold and preservation request information automatically pushed to Passport:

- Legal Hold Name
- Issue Date
- Release Date
- Legal Hold Status
- Status of Custodian Responses
- Status of Non-Custodial Data Sources (NCDS)
- Total # of Custodians on Hold
- Total # of NCDS on Hold

The Atlas Connector tightly links a legal department's matter management and discovery management processes.

Wolters Kluwer

When you have to be right