Clearwell 7.1.1 Feature Briefing

Legal Hold Delete, Archive and Restore

This document covers the new Legal Hold Delete, Archive and Restore feature in Clearwell 7.1.1

If you have any feedback or questions about this document please email them to **IIG-TFE@symantec.com** stating the document title.

Feature Description

The new Legal Hold Delete, Archive and Restore feature in the Clearwell eDiscovery platform 7.1.1 brings the added ability to delete legal holds related to cases that have completed or test legal holds that were setup. Users now have the ability to delete their legal holds.

For legal holds that have completed but the user does not wish to lose the historical audit trail of the legal hold for retention reasons, users can now archive their legal hold to do a one click "release all" custodians from the notice and remove it from the active legal holds display. When an archived legal hold needs to be referenced again for audit purposes, the legal hold can be restored and a defensibility report can then be generated.

Business Value

This new feature provides the ability to release the hold by either deleting the hold, or Archiving the hold.

Deleting the hold removes the hold from the custodians but it also is irreversible. The benefits are that deleting the hold can free up legal hold licenses.

Archiving legal holds is reversible and it offers the ability to again release the legal hold but in this case the ability to restore the report so access to the reporting feature is available again. This provides the ability to free up legal hold licenses but still have the ability to run the legal hold defensibility reports

Note 1: Restoring a legal hold does not reinstate the legal hold. The custodians remain released from the hold it just allows for the restoration of the reporting features for legal hold

Note 2: If a custodian is on legal hold in more than one case the legal hold license is not released for reuse as legal hold is licenses buy the number of custodians not by the number of holds. E.G. User a has 5 holds in 5 different cases, this uses one legal hold license.

Underlying Principles

This new feature does not add any new database tables or require any additional software to be added to the Clearwell eDiscovery Platform. The feature utilizes the existing legal hold module database but provides the option to free up legal hold licenses so they can be reused in other cases if necessary and to offer the ability to remove the Legal hold but still recall the details for reporting purposes

Test Drive

Legal hold delete

Symantec's Clearwell eDiscovery platform version 7.1.1 brings the added feature to not only release a custodian from Legal hold but to delete the legal hold. This offers the ability to automatically release the custodians from legal hold and free up custodian licenses.

Note that deleteing a legal hold is irreversable without propper legal hold backups so use with caution

To access this feature first select All Legal Holds from the workflow menu at the top of the screen. On the right hand side of each of the holds select the trashcan as shown in Figure 1
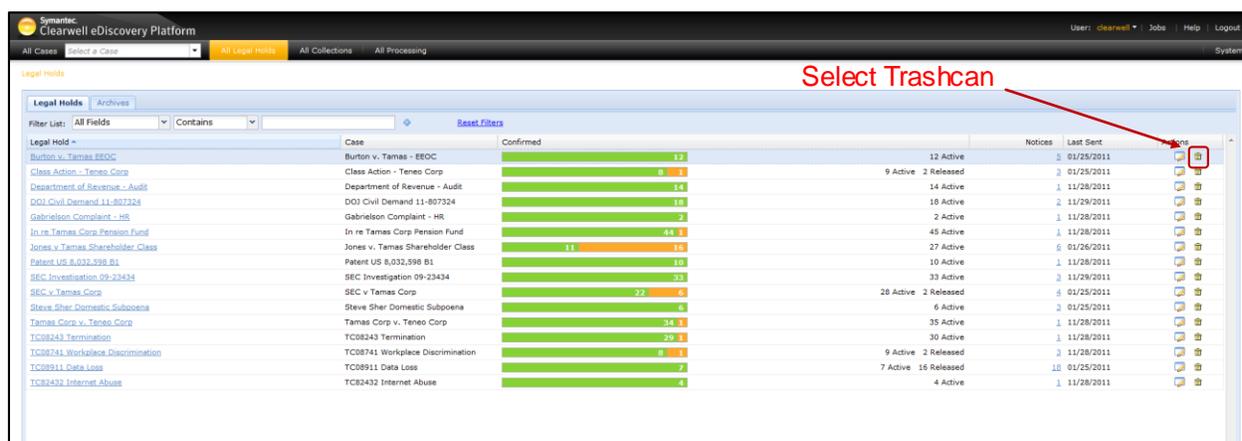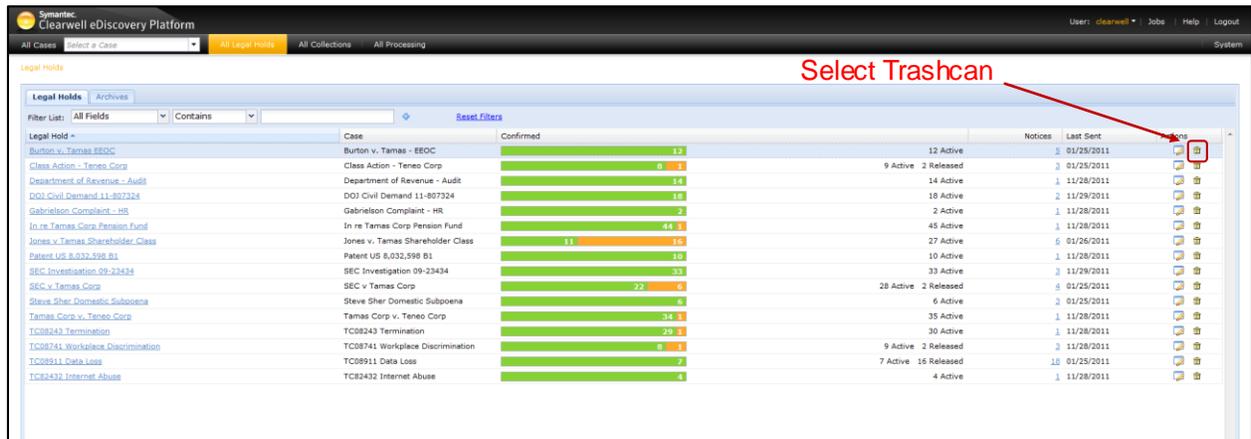

Figure 1 – All Legal Holds

The prompt with the Archive or Delete Confirmation dialogue box. Select Delete as shown in Figure 2

Figure 2 – Archive or delete confirmation

The prompt to confirm the deletion request. Select Delete as shown in Figure 3

Figure 3 – Confirm delete

Legal hold archive

To free up licenses but not delete the legal hold the option is available to archive the legal hold. To access this feature first select All Legal Holds from the workflow menu at the top of the screen. On the right hand side of each of the holds select the trashcan as shown in Figure 4

Figure 4 – All legal holds

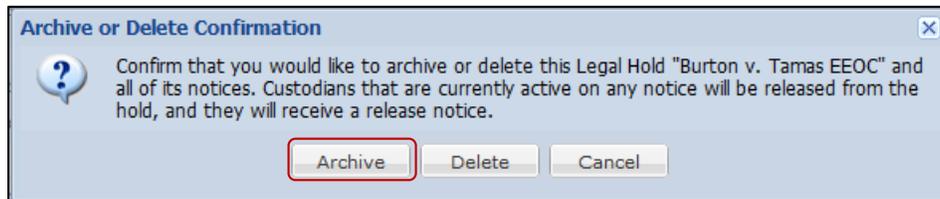When prompted. Select Archive as shown in Figure 5

Figure 5 – Archive or delete confirmation

The Legal hold will be archived and moved to the Archives tab legal hold screen as shown in Figure 6
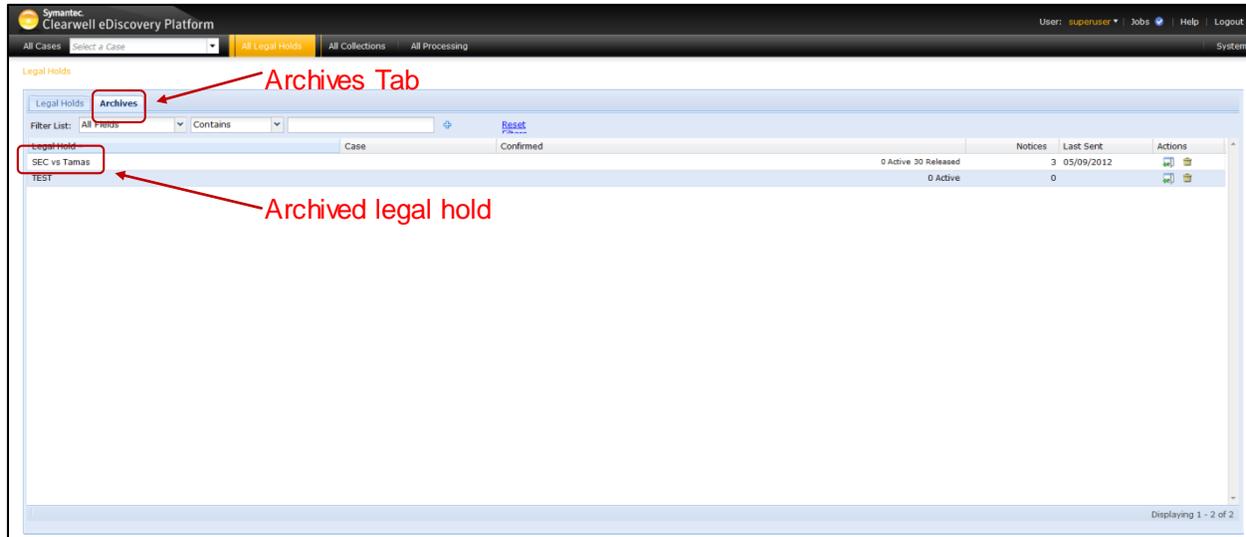
Figure 6 – Archives tab

Archiving will release all custodians from the legal hold.

Legal hold restore

Legal hold restore provides the option to return the legal hold from the archive to a state where access to the reports of the hold are available. It does not reinstate the legal hold. If there is a need reapply the hold a new legal hold will have to be created with the same custodians and content.

To restore a legal hold first select All Legal Holds from the workflow menu at the top of the screen. Next select the Archives tab

On the right side of the screen under Actions, beside the case to be restored click on the restore button as shown in Figure 7
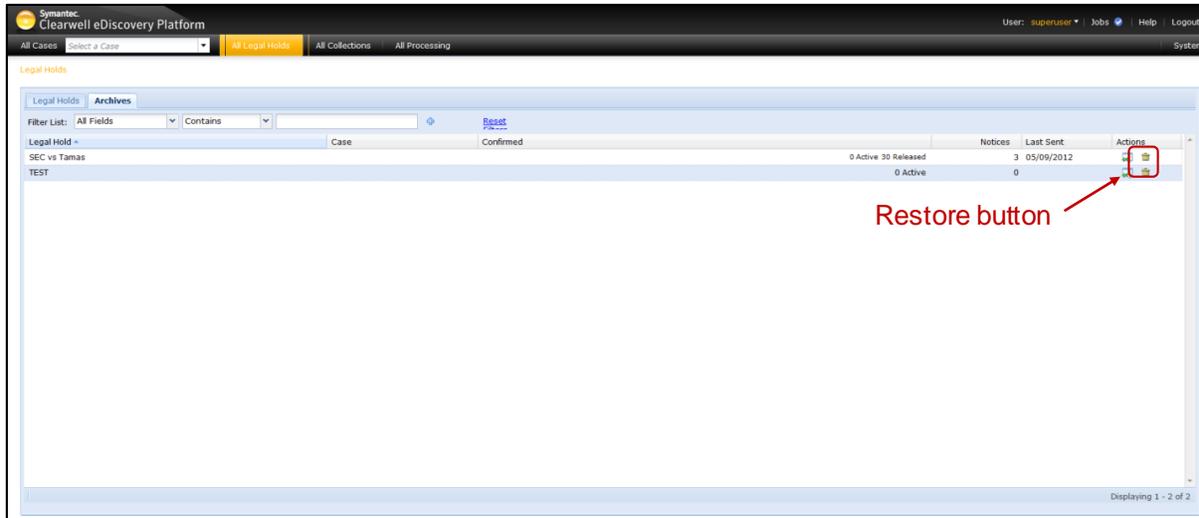
Figure 7 – Restore button

The Restore legal holds prompt will appear, click on Yes, Restore as shown in Figure 8

Figure 8 – Restore confirmation

As you can see in Figure 9 the case will be restored to the Legal Holds tab where the ability to see the content of the legal hold and the reporting options will be available again.
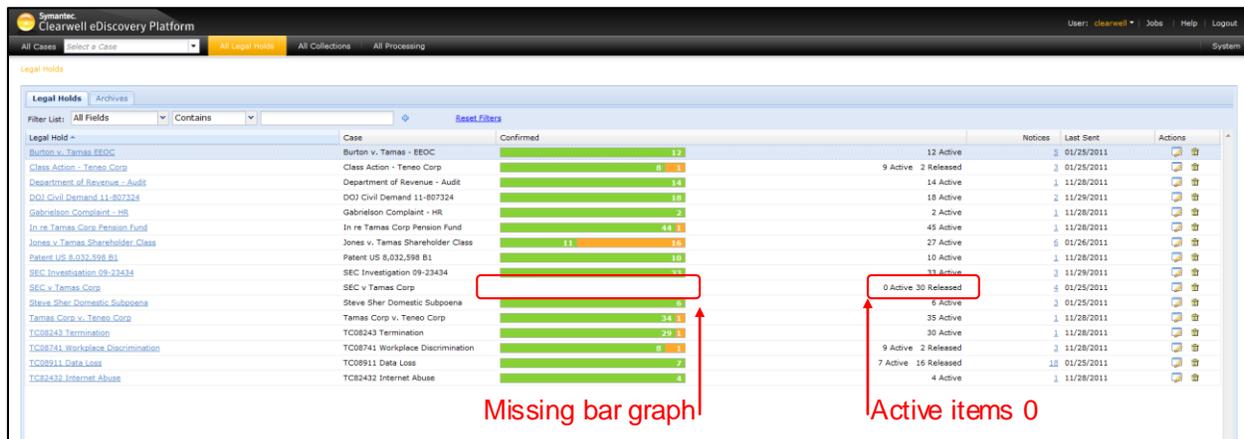

Figure 9 – Restored hold

Also note that the bar graph under Confirmed is missing, the number of items active is 0 and the number of released will match the number of custodians in the case in this instance it is 30. This is because

restoring a hold does not reinstate the legal hold. It just provides the ability to release the holds and restore for reporting purposes only.

Licensing and support considerations

The new legal hold delete, archive and restore feature is delivered as part of the standard Legal Hold module in Clearwell 7.1.1

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Symantec Corporation
World Headquarters
350 Ellis Street
Mountain View, CA 94043 USA
+1 (650) 527 8000
+1 (800) 721 3934