

## Atlas eDiscovery Process Management for Legal

### Empowers legal and IT professionals to manage defensible legal workflows

Atlas eDiscovery Process Management™ empowers attorneys, paralegals, and discovery professionals to efficiently manage a rigorous, highly defensible legal holds workflow. It enables corporate legal organizations to use outside counsel more efficiently by electronically pre-interviewing custodians and reducing the scope of the data required to be collected and reviewed. Atlas eDiscovery Process Management automates the communication of discovery requirements and facts between IT and legal staff, including action item assignments, notifications, alerts, work planning, and searches through holds and collections. Atlas eDiscovery Process Management helps produce a more reliable, defensible process record for improved, more cost-effective legal outcomes.

#### Benefits for Legal

##### *Effectively manages custodians*

Scopes and manages custodians and data sources more efficiently and with greater precision.

##### *Automates hold publication*

Streamlines and automates hold publication to reduce manual tasks and associated errors significantly.

##### *Delivers effective virtual interviews*

Provides the capacity to conduct more effective virtual interviews and automate follow-ups based on superior interview results.

##### *Controls, monitors, and manages discovery*

Enables your legal staff to control, monitor, and manage the discovery process from start to finish to provide more accurate and efficient record keeping.

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#### Highlights

- Conduct virtual custodian interviews
  - Scope more efficiently and precisely
  - Eliminate manual follow-up
  - Preserve data in place and collect without employee disruption
  - Automatically monitor collection status and chain of custody logging
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## Key Features

### *Control, monitor, and manage the discovery process*

Define, track, and monitor various preservation, collection, and discovery activities in a single system of record for higher integrity and less manual record-keeping. Follow the natural sequence of events and iteration throughout a typical matter lifecycle. Automatically detect exceptions to holds, collection requests, and interviews, and send alerts to legal staff through email or dashboards. Specify the legal team for highlighted matters and share alerts and action plans automatically.

### *Scope and manage custodians and data sources*

Segment and manage messages for large custodian lists. Identify custodians by numerous attributes, including their responsibilities for records or IT systems and their involvement in the issue in dispute – by department affiliation, function, role, and other criteria. Define and track data sources involved in matters. Add and remove data sources as matter-of-facts change. Track terminated employee assets and alert appropriate legal staff when custodians in their holds transfer or terminate.

### *Conduct effective virtual interviews and automate follow-ups*

Combine initial hold notices with custodian questionnaires and incorporate hold compliance tracking. Establish intervals for re-issuing questionnaires, track responses, and set escalations for non-responses. Author a library of standard questionnaires. Update questions as needed. Automatically collate recipient responses by group, question, answer, and follow-up actions. Set automatic alerts and action items for specific answers.

### *Coordinate discovery tasks*

View past and current collection activity in a single, convenient dashboard. Search for current legal holds and collections by employee or system. Avoid inadvertent disposal of data on hold. Log legal requests automatically in your ticketing systems. Deliver full hold and collection instructions with thorough and relevant custodian and data parameters in a collection workbook. Share tasks and job lists throughout the data collection team.

## About Breakwater

Breakwater helps mitigate risk and gain insight from sprawling information by combining technology automation and human expertise. Our expert consulting, software, and managed services address the challenges within information governance, disputes and investigations, regulatory compliance, privacy, and cybersecurity. Our solutions allow governance, legal, and risk professionals to locate, access, analyze, and manage information by making data transparent and actionable. Breakwater helps clients in public and private sectors mitigate risk, improve productivity, and increase profitability by transforming how they use data.

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