

ATLAS AND THE EDRM MODEL

AN OVERVIEW FOR LEGAL AND IT EXECUTIVES

The Atlas Suite helps eliminate unnecessary legal risk and reduces discovery and data management costs.

Atlas aligns Legal, IT, Records Management, Finance and Lines of Business to drive down preservation and retention risk and cost. The Suite includes products that cover the elements of the EDRM module that are typically managed and performed by corporate counsel and corporate IT staff. Atlas enables your company to meet its duties for legal information governance and defensibly dispose of data with no business value.

Manage an intelligent process for legal holds with far less effort than alternative approaches to preserving and collecting data. With Atlas your company can achieve compliance efficiently with an employee portal and workflow for IT and manage cross jurisdictional discovery and privacy issues more effectively and strategically with country-specific procedures.

Accelerate value-based retention management. Quickly launch a global program that leverages existing schedules and staff. Atlas publishes accurate schedules and applies global information standards while delegating responsibility locally. Atlas also enables IT to defensibly dispose of information with no business value while preserving data on hold.

Predict and control discovery costs. Put discovery cost at the forefront of legal decision making with continuous cost assessment. Atlas improves your negotiating power on what you will collect and produce and controls current and future discovery costs across the portfolio.

Top eDiscovery Software Provider



- » Preservation
- » Identification
- » Corporations
- » Law Firms

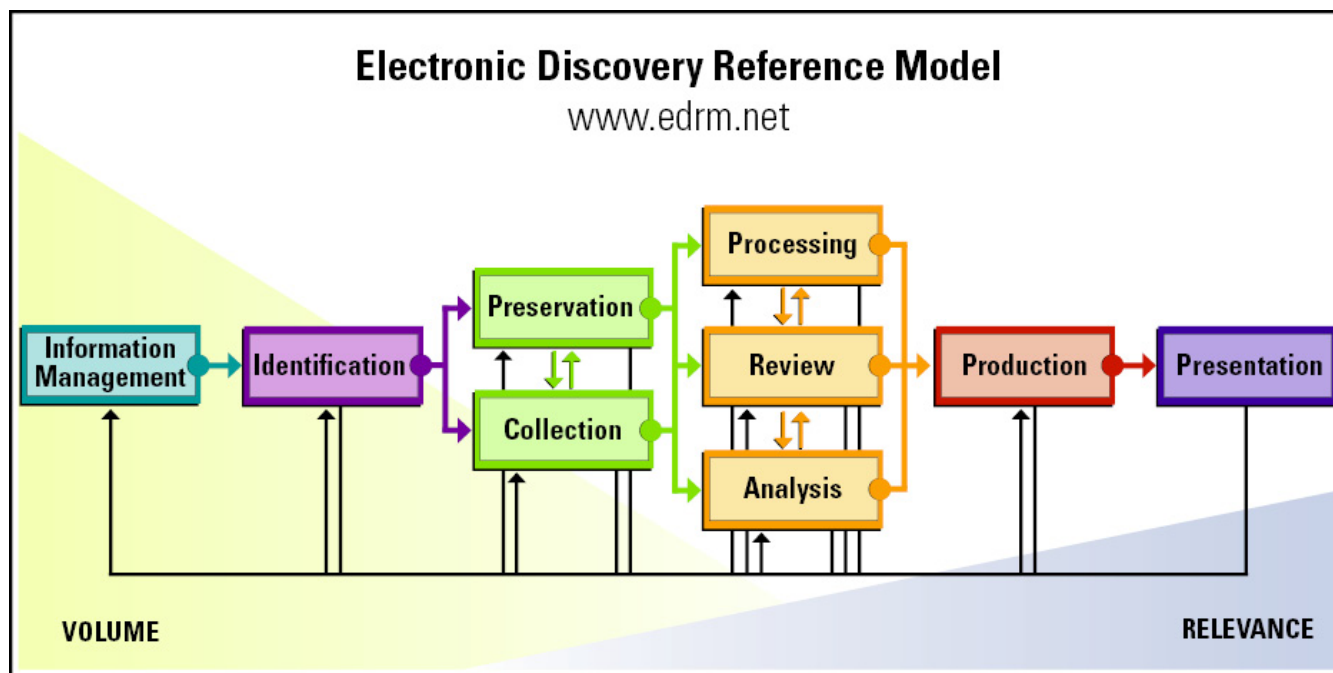
“PSS has the only truly end-to-end retention and legal holds solution on the market. Atlas is a well thought out, comprehensive software that adds real value.”

— Harry Pugh, Managing Director,
Citigroup

“The Atlas Suite, which is designed to enable corporations to implement and automate legally defensible retention and legal holds operations, has achieved significant customer uptake and enjoys real customer loyalty”

— Vivian Tero, Program Manager,
Compliance Infrastructure Service, IDC





Information Management

Atlas Enterprise Retention Management provides global retention schedule management with tight linkage to privacy and legal holds. Without connection to a robust preservation process, retention programs can not achieve their objective of defensibly reducing unnecessary information volume. An essential component of any data source mapping approach is the business context of information and the business users' perspective on how their data is created and managed. Atlas is the only suite that combines IT-driven data source identification with business team-driven data source identification to help define and control how valuable information is managed.

Identification

Atlas Enterprise Discovery Management provides a comprehensive map of people and systems by business group, region and other organizational affiliation from which initial matter scope is efficiently and reliably done. Virtual interviews enable iterative scoping based on employee knowledge while search automation of email

archives, file shares, and ECM systems enable data-driven identification. The combination of employee knowledge and data content accelerates and improves the process. Enterprise Discovery Management manages the master list of custodians and data sources throughout the many changes in scope that occur over the matter lifecycle; moreover, it automatically alerts the appropriate legal staff when an affected employee transitions or a system changes status.

Atlas Discovery Cost Forecasting adds another critical consideration to the litigation strategy and early case assessment: the likely cost of discovery should the matter proceed to litigation. Clearly, the best way to reduce discovery costs is to avoid them and without early and constant visibility to such costs, they are inevitable and unavoidable. With Atlas, a more informed risk/reward decision can be made at the earliest possible stage in the matter. Given that very often, the party conducting review and production of the data has different economic incentives that the corporation itself, this early visibility is incredibly important to controlling discovery spend.

“PSS Systems is widely recognized as the leading legal holds vendor.”

— Alan Radding, *Storage Magazine*, May 2008

Preservation

Atlas Enterprise Discovery Management is the original legal holds system and the recognized “gold standard.” With Atlas, legal staff can preserve information appropriate to each individual matter:

1. By issuing hold notices directly to employees with employee certification, automatically tracking compliance and escalating non-compliance, and systematically sending reminders. An employee portal personalized for each employee ensures that employees always know what holds apply to them.
2. By issuing hold instructions directly to email archives and other content stores to preserve data in place. Atlas hold and collection automation protocol works with your existing infrastructure to minimize disruption and data duplication – especially important in companies with large litigation portfolios or reduced IT staff.
3. By issuing a hold work ticket to IT staff for a system, set of systems, or set of custodians. Neither IT nor legal staff need to duplicate spreadsheet tracking to manage IT-assisted holds. Atlas Discovery for IT ensures that every IT employee can look up any system or custodian to determine if there are current holds so they can confidently and efficiently manage data.

All activities are automatically captured in the audit trail, custodian lists are systematically reconciled, and there is little difference in effort between 3 or 3000 legal holds with Atlas. The Atlas law library helps attorneys calibrate their US-driven discovery strategies in compliance with other countries’ laws by quickly determining where access, transport, search or disclosure are prohibited or restricted based on data location.

Collection

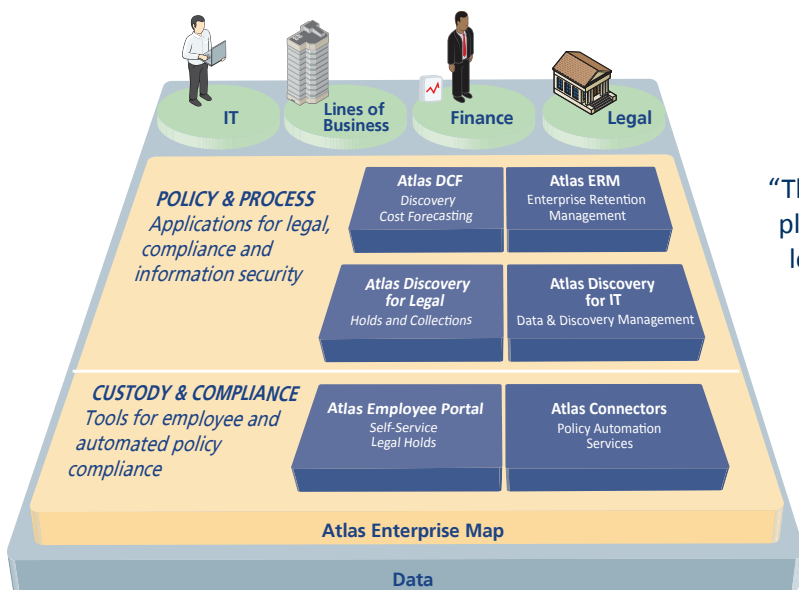
Atlas Enterprise Discovery Management has always provided powerful workflow for coordinating and conducting collections from disparate sources as is often typical in corporate matters. It eliminates the duplicate spreadsheets kept by paralegals and IT staff, provides status visibility on each collection task, and automatically captures facts about total custodians, total volume, volume

per custodian and other pattern information that can help predict, control and reduce discovery cost. Using Atlas discovery cost forecasting, legal staff are better armed to negotiate smaller collection pools and less data for production.

From their Atlas Enterprise Discovery Management browsers, legal staff can collect data in a variety of ways commensurate with the dispute and data involved. They can:

1. Identify the data they need from a particular data source, the parameters of the collection such as custodians, date ranges, terms, specific report views, and so on and collect directly from the target system via Atlas.
2. Issue a collection request ticket to IT staff (or IT ticketing system) for a system, set of systems, or set of custodians with the collection scope and parameters precisely defined for easy completion. With Atlas, IT staff can track open collection requests from a dashboard, quickly collect the data and load it to Atlas for safekeeping and automatic logging of chain of custody; their dashboard shows discovery-related work levels so they can sustain adequate staff to meet legal obligations. Neither IT nor legal staff need to duplicate spreadsheet tracking because Atlas is a shared system of record.
3. Issue a collection request directly to employees, including record coordinators and system managers. Recipients receive an email with specific instructions and can “drag and drop” data directly to a secure web page, returning in multiple sessions if needed. Chain of custody is preserved for the collected data and documents, and all are automatically captured and tracked in Atlas by custodian. This is particularly helpful for responding to routine requests for reports and account data, for example, in regulatory or 3rd party subpoenas.

In EU settings, this is the most appropriate “voluntary” collection approach; some companies manage this custodian-performed collection via a simple web meeting where US legal staff are easily able to see European Union employees’ PCs and assist them with voluntarily identifying and collecting



The Atlas Information Governance Suite

data for a matter. Obviously, it is equally cost effective for US-based employee-assisted collections.

All data collected by Atlas is automatically logged to the matter, data source, and custodian to which it is related; the files are hashed and chain of custody is automatically collected at the individual file and document level. The chain of custody includes the file with metadata intact, its path on the source machine, the collection instruction, means, and protocol, when it was performed and by whom (which is systematically documented as it is done by Atlas), who requested it, and the collection task or plan with which it was associated.

Legal staff are able to use any and all modes of collection in a single matter and can coordinate collection across systems and sources easily; Atlas tracks due dates and delays and enables the requestor and assignee to collaborate as the collection work is done. The collected contents are indexed for full text search as they are loaded to Atlas. Together, these management tools help the legal team determine if collection is sufficient and complete before processing the data and initiating review.

Atlas works with a variety of analytics, search and review tools so that legal can hold and review in place to avoid data duplication and unnecessary legal expense, including systems from IBM, Symantec, EMC, Kazeon, Stored IQ, Attenex, Access Data, and others.

“The automation and integration of the Atlas platform have made it the de facto standard for legal holds and retention management software such that PSS Systems is currently the recognized subject-matter expert on business systems for addressing preservation, retention, and privacy burdens.”

— Karen A. Schuler, [E-Discovery: Creating and Managing an Enterprisewide Program](#), Burlington: Syngress, 2008

Powerful Workflow and Workload Management for Both Legal and IT

The Atlas Suite is an essential part of managing legal obligations for information, including proper retention for regulatory requirements and preservation and collection of information for discovery purposes. It uniquely addresses the inter-relationship of discovery to data volume, and of information management to the preservation and collection of data. Information management is disabled without an effective preservation methodology with sufficient accuracy and transparency, and only Atlas provides a closely coupled retention and preservation.

Because Atlas provides continuous discovery cost assessment for each matter and across the litigation portfolio, it serves the in-house legal team’s need to reduce both risk and cost by better informing case strategy from day one while keeping cost on the radar while matters unfold. IT teams prefer it because it works with all popular collection tools and enables attorneys to collect directly from existing repositories without burdening IT. Atlas is the only system that gives IT a governance portal to help them more effectively retain, dispose, protect, hold and collect data, so companies can address the root cause of high discovery costs: too much data in the enterprise.



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