DOCUMENT EXPLORER

Sightline Help Documentation

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Sightline's Document Explorer

The Document Explorer presents a single place where a Project Administrator User or a Review Manager User can browse through all the data along with some of their key properties, run searches and filters against those properties, see how it is structured, and view documents without having to perform additional operations like Search or Tally.
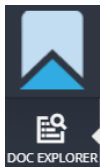
When logging in as a Project Administrator, the default landing page is the Doc Explorer page. This page can also be accessed at any time from the menu panel on the left using the new menu option "Doc Explorer" as either a Project Administrator or a Review Manager.

The documents presented on the Doc Explorer reflect all the documents to which a specific User has access. These are all processed documents in the project for a Project Administrator and all the documents released to the security group for a Review Manager. The left side of the Doc Explorer page presents a Structural Tree View, and the right-hand side of the page presents the grid of documents from the currently selected node(s) in the tree view.

Structural Tree View
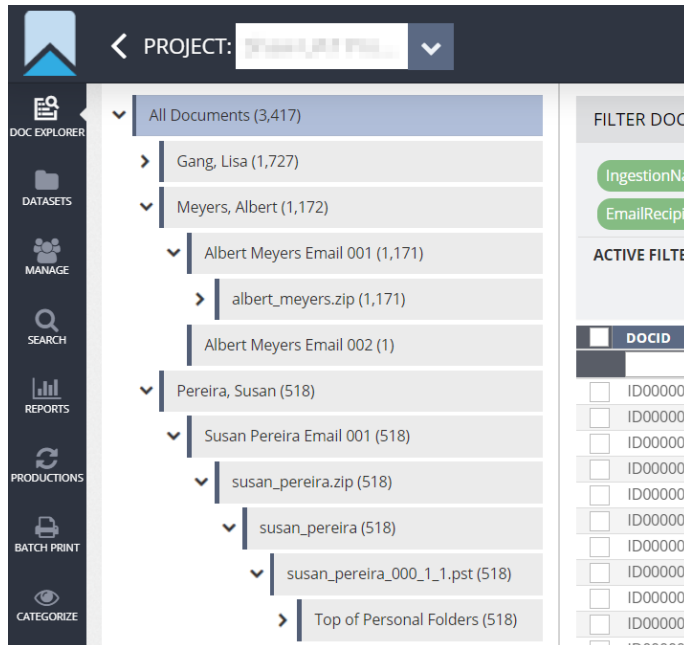
The tree view on the left side of the Document Explorer gives an idea of how the documents in the project are structured. The root of the Structural Tree View presents the root node "All Documents" that correspond to all documents visible to the current logged-in user (all docs in the Project for the Project Admin User or all docs in the Security Group for Review Manager User).

The nodes immediately below the root node represent custodians present in the Project (for Project Administrators) or Security Group (for Review Managers). Below each custodian node are nodes that correspond to the individual Datasets for that custodian.
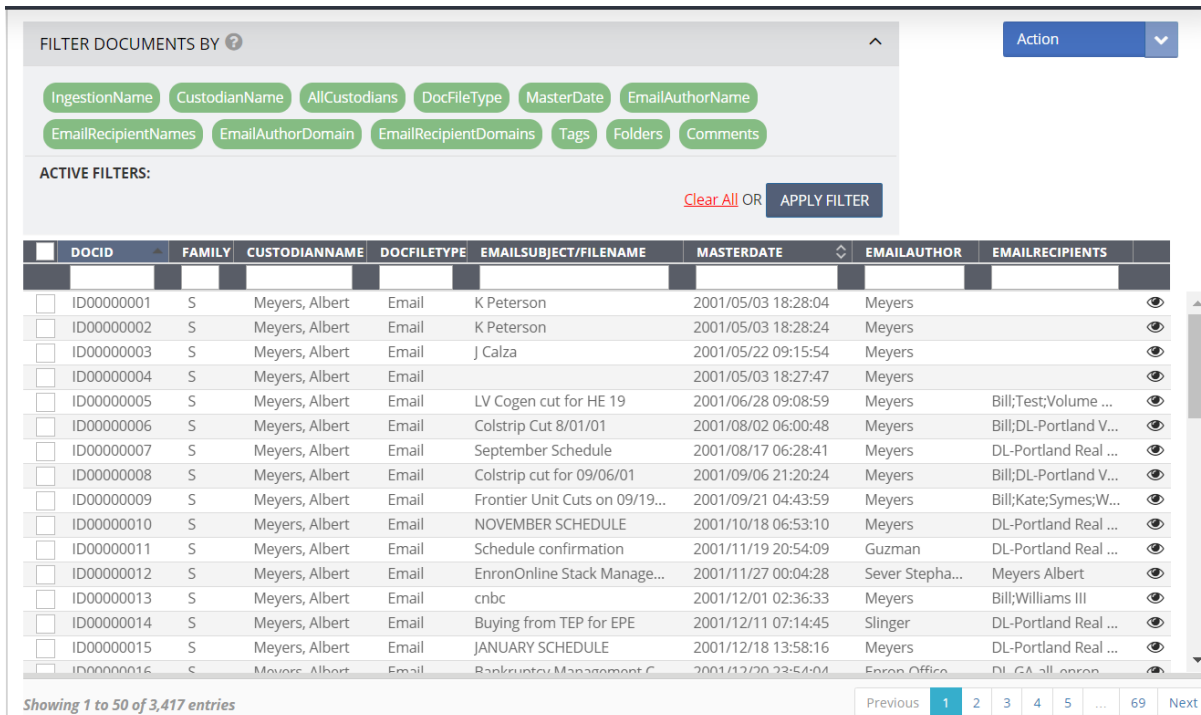
The Full Paths of all records uploaded as part of the Dataset are presented as sub-nodes below each Dataset node. Users can drill down through a Custodian, to a Dataset, down to a Full Path location just like they go through the directory hierarchy in Windows File Explorer. Alongside each node is presented the count of documents that fall in the tree/hierarchy under that node.

Users can increase or decrease the visible area of the tree view by dragging the line separator between the left and right panes in the Document Explorer.

Document List View

When a user clicks on a node (or multiple nodes) in the Structural Tree View, the right pane of the Document Explorer presents a Document List View (grid) of the corresponding documents within the selected node(s) on the Structural Tree View.

The Document List View has a filter section and an Action dropdown at the top, and a grid presenting the documents in the body of the page. Users can select documents from the grid and perform the actions on those selected, including "View in DocList", "View in DocView", "Bulk Tag", "Bulk Folder", "Bulk Release" (for Project Administrators) or "Bulk Assign" (for Review Managers) and "Export Data", by using the "Action" dropdown.

The documents in the grid are shown in a paginated list, with 50 documents presented per page. Users can navigate through the next page of documents by clicking on the page number at the bottom of the grid. For each document in the grid, a fixed set of attributes/columns are presented, which are: DocID, Family, CustodianName, DocFileType, EmailSubject, MasterDate, EmailAuthor and EmailRecipients.

> NOTE: **These columns cannot be changed.** To see other headings, users should select all records and then "View in DocList" where the column selection is customizable.

In the grid, the family-related records are listed together and are presented with same row background color. By default, the documents in the grid are sorted on DocID column. Users can optionally sort the documents based on the MasterDate column. If you choose to sort by "MasterDate", the application also performs a secondary sort on "DocID" to keep family documents together. For each document in the grid, users can preview the document by clicking on the "eye" icon on the right side of the grid. Users can resize and increase the space available to a column in the grid by dragging the line separator to the right of the desired column in the column header.

Document Filtering and Searching

Document Explorer provides two ways of filtering documents presented in the Document List View. A user can filter either the documents in the grid by using the "Filter Documents By" section in the top or by using the column header filters within the grid.
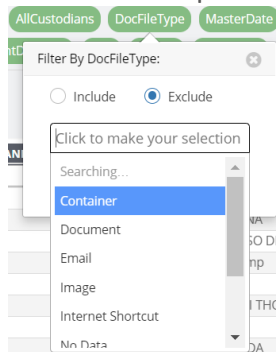
Filter Documents By
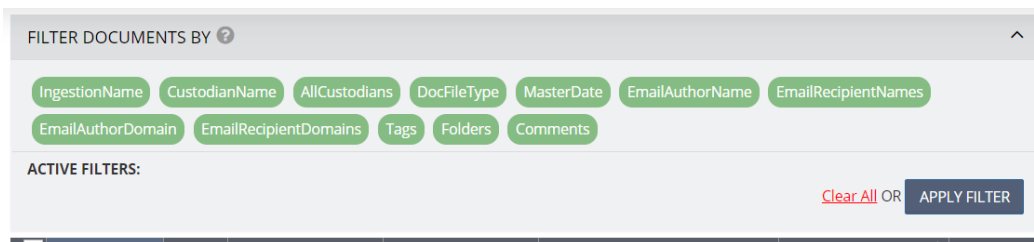
The "Filter Documents By" options at the top of the page includes the metadata and work product objects IngestionName, CustodianName, AllCustodians, DocFileType, MasterDate, EmailAuthorName, EmailRecipientNames, EmailAuthorDomain, EmailRecipientDomains, Tags, Folders and Comments.

These work the same way as the "Filter Documents By" sections in the Reports and DocList view and allow the users the be either inclusive or exclusive with their filter options. The user can choose multiple filters and can also enter multiple values for a selected filter. The "Filter Documents By" section is collapsible so that more rows are visible within the grid.

The documents presented in the grid can be narrowed down by selecting one or more "Filter Documents By" options and clicking on "Apply Filter". When the user clicks on "Apply Filter", all the selected filters will be applied and treated as an "AND" condition (ex. MasterDate is between X and Y AND DocFileType is Emails). The values specified within each filter are treated as an "OR" condition (ex. DocFileType is Emails OR Documents).

Column Filtering

In addition to the application of the filters from the "Filter Documents By" section, you can also filter by typing all or part of a word into the column header boxes. This can be used in conjunction with the "Filter Documents By" filters or by itself.

To use column filters, you can type filter values in the text boxes in each column header and either click on "Apply Filter" or press the "Enter" key. To remove all the filters, you can delete the typed text and press the "Enter" key, or simply click on "Clear All" link.