LOGGING INTO SIGHTLINE

V3

Consilio®

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Sightline Overview

At a high level, executing eDiscovery projects in Sightline is no different than it is in other online review software such as Relativity® by kCura. That process flow is illustrated and generally described below.

First, data that is collected is processed using our proprietary software, ICE. If enabled, the client can process their own data using the Drag and Drop feature in the Datasets menu. The post deduped and deNISTed data is Ingested into Sightline. During ingestion into Sightline, Sightline will automatically run analytics against that ingested data sets to include:

- Email Threading analysis
- Textual Near Dupe analysis,
- Conceptual analysis, and
- Language Detection/Identification analysis

After analysis is completed, the Consilio team "publishes" records into a project database for the project. That project database is private, confidential and secured for this specific matter.

If keyword culling is to be employed, keyword searches are against that published set of documents. The Consilio team, or more advanced client users, will then release the specified document sub-population into a security group for review. At this time, documents are available to be searched and viewed by clients.

Consilio will teach clients to batch documents into discrete Assignments for review on their own. These Assignments can be individually configured to be prioritized for specific reviewers and can be configured to meet the needs of review of that set of documents. The client review leads will map reviewers into Assignments so that individual reviewers can get in to Sightline to code documents within Assignments and apply work product and/or redactions.

Once documents are ready for production, those productions happen directly out of Sightline. Consilio will assist clients with all aspects of the production delivery, or training around the Productions Module in Sightline.

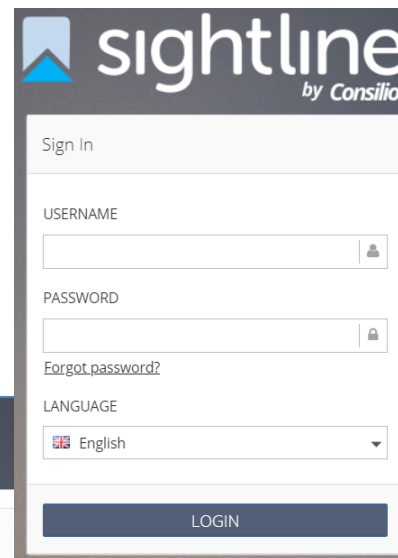## Sightline Glossary: Understanding Terminology of Sightline

All review software applications are unique in functionality, and as a result the terminology of each platform is unique. In order to overcome basic communication challenges, this document provides a definition of key Sightline terminology as well as a mapping of Sightline terminology against Relativity terminology.

Sightline Term	Relativity Term	Brief Description
Project	Project	This is the private database that is configured for the matter
Workspace	Workspace	This is the dedicated storage on the infrastructure for the project data
Document	Document	An individual record defined by a unique DocID identifier
User	User	The credentials issued for a specific individual
Role	Security Group	The group of functionality controls permitted by a user
Security Group	Review Population	The collection of documents that are released for review
Folder	Folder	A collection of documents that meet some specific criteria
Metadata Field	Metadata Field	An object in the database that stores information about a document
Tag	Choice	A binary ON/OFF object in the database that stores work product
Comment	N/A	A free text object in the database that stores work product
Coding Form	Layout	A collection of fields where reviewers apply work product
Assignment	Batch Set	Documents that are to be batched out to individual reviewers
Reviewer Batch	Batch	Documents that are assigned to as single reviewer for review
Saved Search	Saved Search	A query stored in the project for repeated or future use
N/A	View	A set of fields displayed on list pages. No equivalent in Sightline because columnar selection and sorting in a view is all done self-service by users
Production	Production	A set of files generated for a group of Documents that conform to a production specification

As is evidenced by the table on the previous page, most concepts in Relativity map to Sightline with a considerable amount of terminology overlap, but given the uniqueness of each review platform, some concepts are different, and some terminology is different.

Logging In

Sightline is a web application that is accessed directly via a URL typed into a web browser. There is no need for remote desktop or Citrix thin client or any other such solution unless the machines accessing the environment do not conform to this basic system requirement specification. Sightline also utilizes dual factor authentication in which an access code is sent to the user's email address upon logging in. That code will need to be inputted into Sightline within 20 minutes or new code will be needed.

Computer Requirements

In order to use Sightline, client machines must run either Windows Vista or higher or Mac OS X or higher operating system with a minimum of 2GB of RAM and a broadband internet connection that supports at least 5MBPS. The client machine must be configured with Microsoft Internet Explorer 9, Microsoft Edge or Google Chrome browser v25 or higher in order to access all Sightline functionality. The minimum browser resolution is 1280 pixel window size width by 720 pixel window height.

If the client wishes to download natives for review on the local machine, the machine must have compatible proprietary software such as Adobe Reader, or Microsoft Office.

For optimal performance, Consilio recommends 4GB of RAM and a dual-monitor configuration.
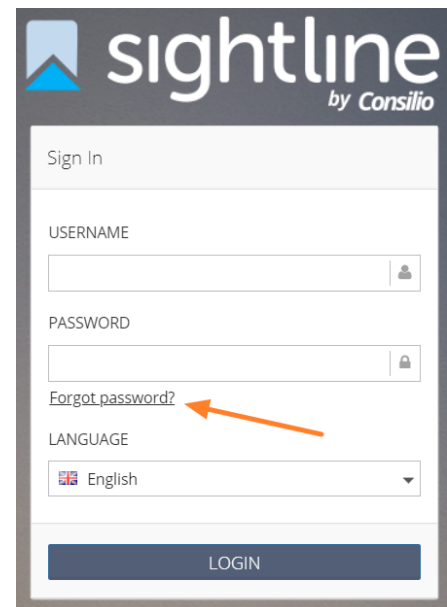
The URL to access Sightline is specific to the data center installation where Sightline is set up for client use. Your Consilio project manager will provide you with that URL.

Username and Password

Sightline users require a username and password combination to log in. The username is the confirmed email address of the specific user. The user's email address/username is used for dual factor authentication, it is also where system notifications will go and how the user can reset his/her own password.

Password reset is performed by the user themselves using the "Forgot Password" link on the login page. However, if the user attempts to log in 3 times and fails, that user account will be locked and may only be unlocked by a Consilio project manager.

When users authenticate to Sightline with their username and password, they will only see Projects and Security Groups that they have been granted access to.
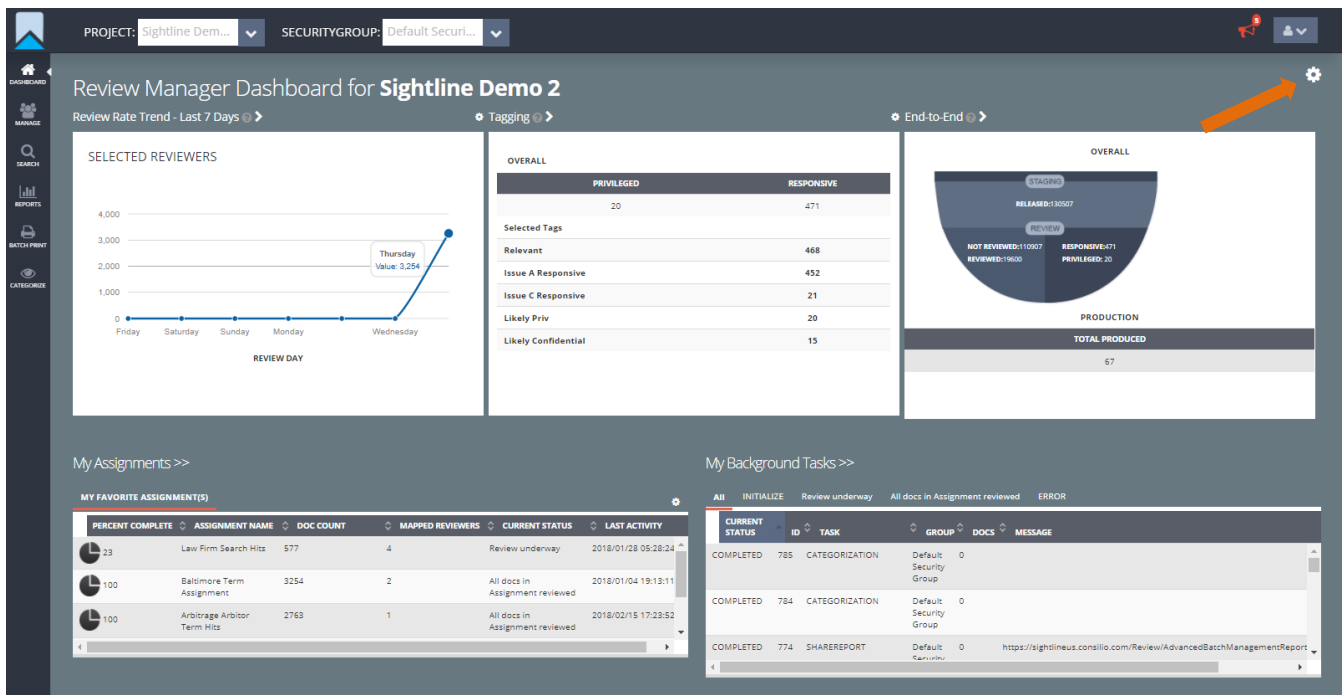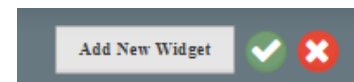
Configuring Dashboards

Review Managers will have a Dashboard when they log in that can be customized and configured to suit their needs. To add/change Widgets on the Dashboard, Review Managers must click the big "gear" icon in the top right of the Dashboard page as shown below.
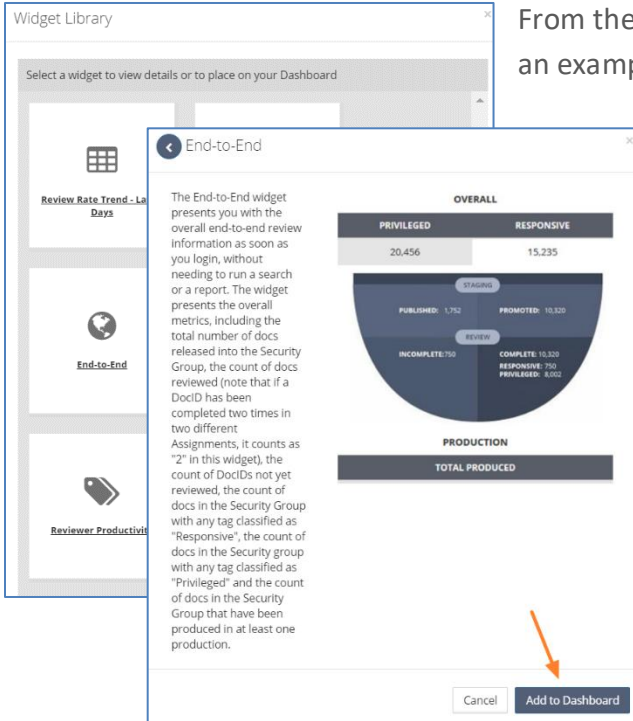
When a user logs in for the first time, the only widgets on their dashboard will be the My Assignments and My Background Tasks. The user will need to add additional widgets. Please note that the dashboard is unique to each user.

Widgets can be added to see a full end to end picture of the data, review metrics or tagging results. This allows the Review Manager to get a high level view of their database immediately upon logging in.
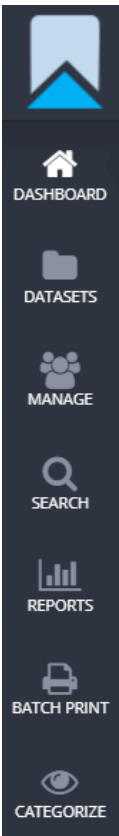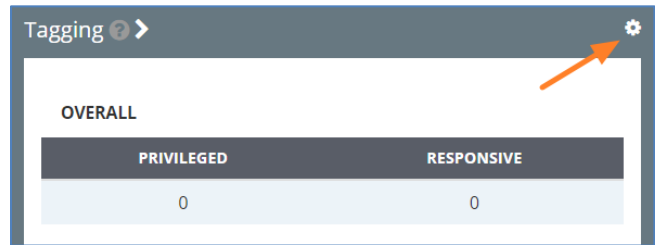

When the Review Manager clicks that big "gear" icon, the control will change, presenting options to close the new control or Add New Widget from the Widget Library. If the user clicks "Add New Widget", the Widget Library appears, allowing the user to see the various Widget options.

From the Widget Library, the user can select any widget to see an example of that widget before clicking "Add to Dashboard".

For each individual widget, there may be a small "gear" icon in the upper right corner of the widget, allowing the user to customize the presentation of that widget.

Sightline Menu

The left-hand side of Sightline is the Menu. From here the user will have access to the other areas of Sightline. Some menu options will take you to a new page, while others will display a submenu when you hover your mouse over the option.

The menu may appear different if you are logged in as a Review Manager, a Project Administrator or a Reviewer. You may also see additional options depending on your account setup.

For further information, please reach out to your project manager.

Additional documentation is available for each of these menu options. You can also utilize the contextual help by clicking on the ? you see next to any text in the system.