SEARCHING IN SIGHTLINE

Sightline Help Documentation

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Sightline Search

Sightline by Consilio utilizes a different underlying search technology than you may be used to – one that has some different syntax. Sightline employs the Lucene-based ElasticSearch engine. For information on the proper syntax to use, as well as a side by side reference with Relativity – which uses dtSearch as its search engine – please reference the Consilio document, **Searching in Sightline v Relativity**. That document serves as a "Rosetta stone" to interpret the search language they know into the search language that may be less familiar to them. This document outlines how to apply that syntax and use the search pages in Sightline.

Session Search and Saved Search

There are two ways to search; Session Search and Saved Search

- Session Search is on-the-fly searching. The system will keep the last 10 searches you ran while logged into your current session. There is a Pin icon next to each of the last 10 searches. Clicking the Pin will keep that search and will not cycle it out of the 10 searches that New Search keeps. You can make any Session Search a Saved Search by clicking the Save button, however, once you log out of the system, any Session Search that you did not save will be lost.

- Saved Searches are searches that are saved to the system and will be available until you delete them. Any New Search can be turned into a Saved Search by clicking the Save button. **Saved Searches are not dynamic; they are static. To get the most recent results you must execute the search or set the search on a schedule using the appropriate buttons from the search ribbon.**
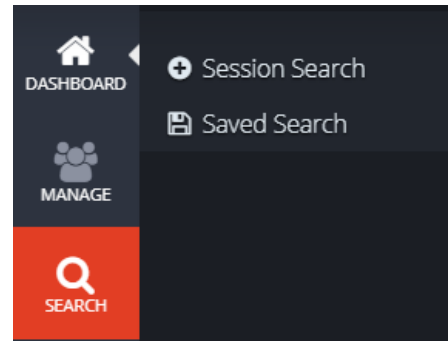
Session Search Page

The Session Search Page will keep the last 10 searches you run in your current session. Once you log out of your session, the searches are deleted. You can pin a search by clicking the push pin icon (red arrow) which will keep that search from getting removed if you run more than 10 searches. However, this will not save the search from deletion when you log out.

To save a search, you can do so by clicking the Save button (green box), which will move your search to the Saved Search Page where it will remain in the system until you manually delete it.

When you type in the box to run your Content & Metadata search, after you type the first 4 letters, you will see some suggestions of words that exist in the index (red box). This is particularly helpful if you are searching for a name.
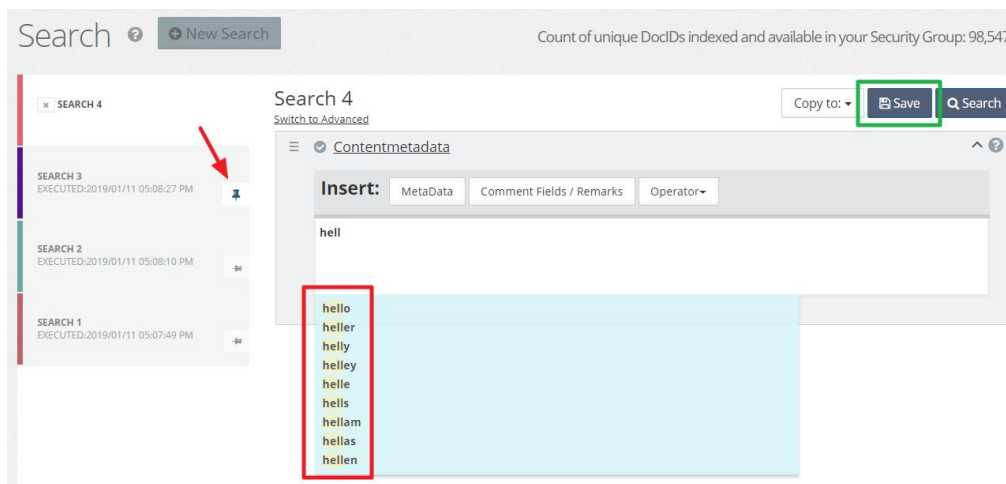
Basic and Advanced Search

By default, you will see the Basic Search window to perform text-based searching. You can search the full text of the documents or limit your search to any metadata field. You can also search the text of the Comment Fields and Remarks. If you wish to search any work product (Security Groups, Tags, Folders, Redaction Labels, Saved Search Results or Productions) you must click on the Switch to Advanced link.

From the Advanced Search page, you can still run full text and metadata searches using the Content & Metadata button. You can also run conceptual searches, phonetic searches of audio files and Work Product searches for Tags, Folders, etc. From the Advanced Search you can also add email threads, families and conceptually similar documents to your main results using the Advanced Search Options.

Basic Search
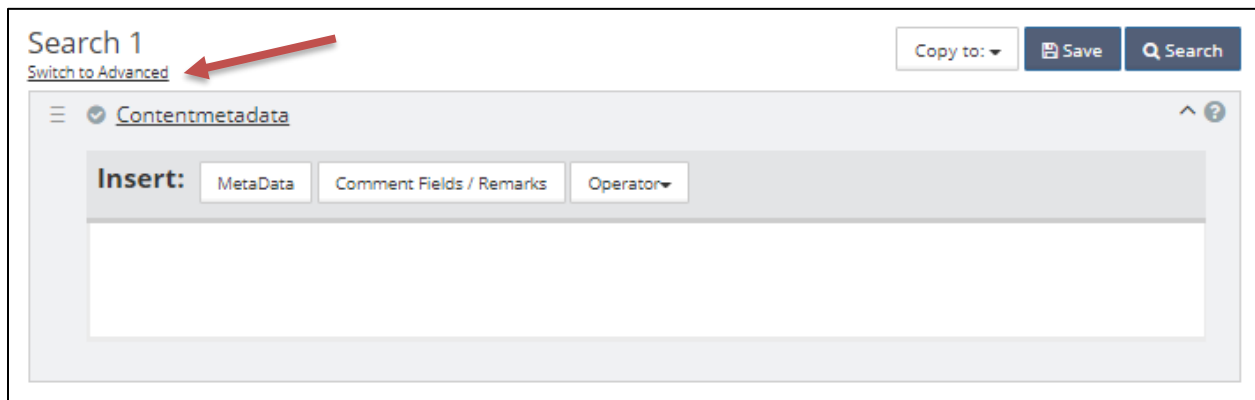
Advanced Search
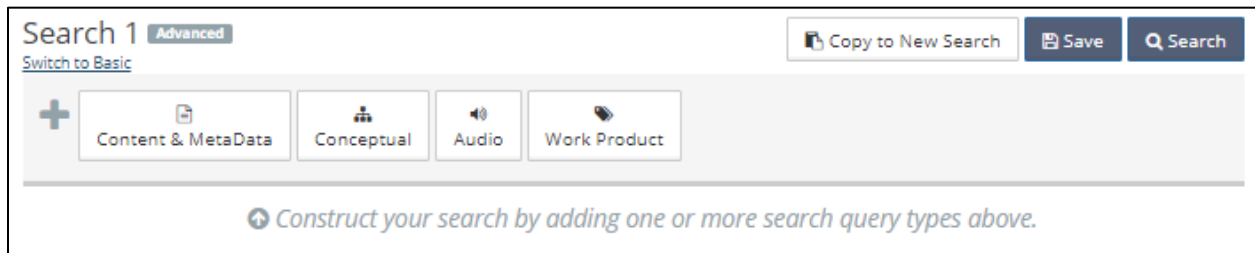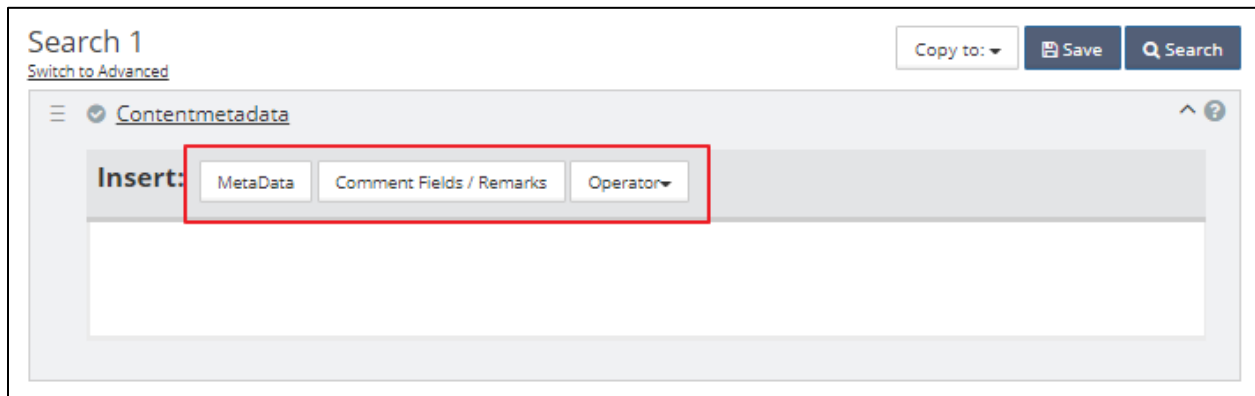

Advanced Search Options

Searching

If you wish to search the full text and metadata of a document, you just need to type directly into the Content & Metadata box either from the Basic Search or from the Content & Metadata option in the Advanced Search box. Please ensure that you are using the proper logic as referenced in the **Searching in Sightline v Relativity** document. Remember, Sightline uses a Lucene-based ElasticSearch search engine and not dtSearch.

You can build a search of text or metadata-based searches or search the Comments and Remarks by using the buttons and operators next to the Insert text (red box below).


You can search both Content & Metadata and Work Product by adding search boxes. From the Advanced Search page, you can select multiple search options by clicking the options. Each time you click an option, it will add a new search box with an operator dropdown in between the boxes. The operator can be changed to AND, OR or NOT.

If you wanted to run a search for documents tagged Responsive that contained the word "Privileged" you would run the below search. From the Advanced Search select the Work Product button, then the Tags button, and then choose the Responsive tag and click Insert Into Query. Next click the Content & Metadata button and type the word, "privileged" into the box. Ensure that the operator in the middle is set to AND and you can now run a search to identify all responsive documents that contain the word "privileged".
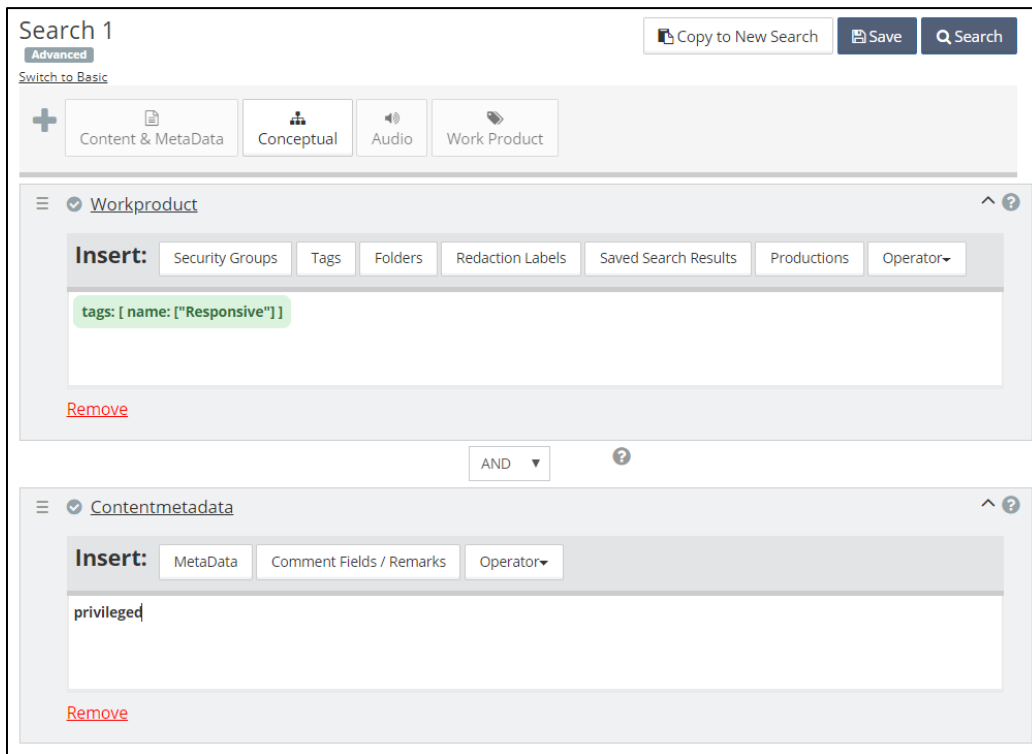
Once you build and execute your search by clicking Search, you can copy the logic to the clipboard, or to a New Search to further refine the results, by using the Copy to: button. You can also save the search by clicking the Save button which will move the search to your Saved Searches.
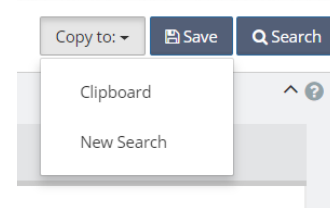
Search Results

After the search is executed your results will appear below the search box. There are several results that will appear.

- Docs That Met Your Criteria - These are the documents that contain only the terms or criteria you search. If you included threads, families or conceptually similar documents from the Advanced Search, this tab will include those results.
- Threaded Documents - These are documents that did not directly hit on your search but are threads of the documents that did meet your criteria.
- Near Duplicates - These are documents that did not directly hit on your search but are 90% textually similar to the documents that did meet your criteria.
- Family Members - These are documents that did not directly hit on your search but are family members of the documents that did meet your criteria.
- Conceptually Similar - These are documents that did not directly hit on your search but are 90% conceptually similar to the documents that did meet your criteria. Please note that this tile requires an extra click to run. There will be a "play" button which will need to be clicked to run this feature.
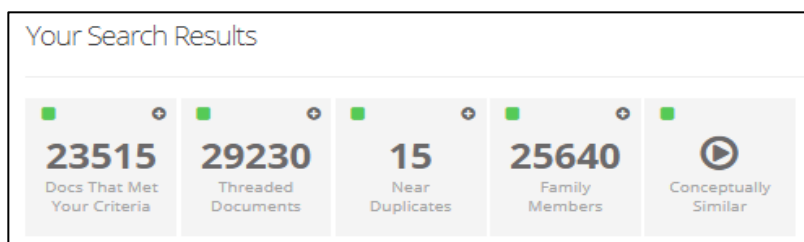
Selected Results – The "Shopping Cart"

In order to interact with your search results, or any of the additional documents that are pulled in for the various reasons described above, you must click and drag the square into the "shopping cart" on the right or click the plus symbol in the top right corner of the square.
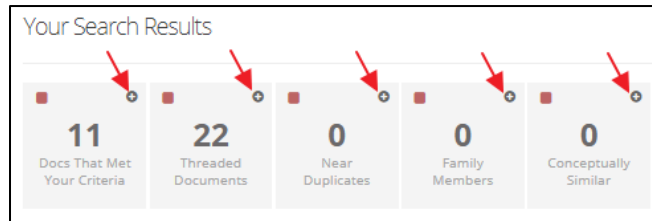
Once you have selected the documents you wish to interact with you can choose how to interact with them from the Action dropdown.

- View in DocList - View the documents in a list or spreadsheet type format
- View in DocView - View the documents in the viewer for tagging or other review
- Tally Results - Tally on metadata values; i.e. you can tally on Custodian to see how many of the results are attributed to which custodians
- Bulk Tag - You can apply a Tag or Tags to the results
- Bulk Folder - You can place the results into a Folder or Folders
- Export Data - You can export selected metadata values into an external spreadsheet to be saved to your local machine
- Analyze in Concept Explorer - Will show the concepts contained within the results of the search
- Analyze in Communications Explorer - Will show the communications map between the documents
- Bulk Release - You can release the results to the various Security Groups within the database