

TAGS, FOLDERS AND CODING FORMS

Sightline Help Documentation

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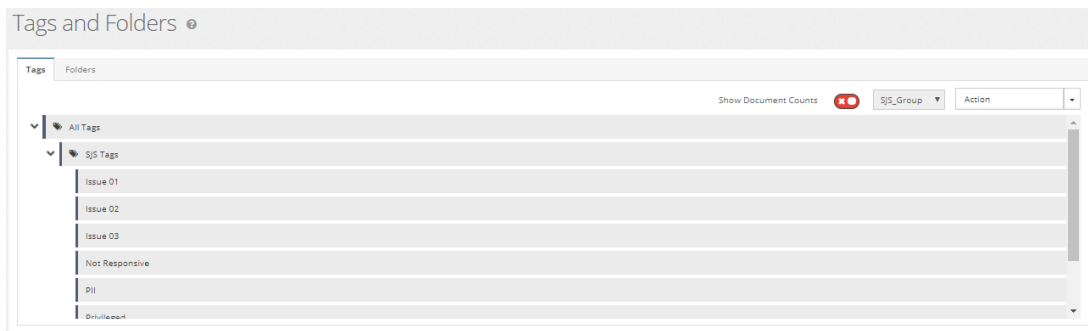
Tags and Folders

Tags and Folders are the way to classify and organize your data through review. While the basics behind a Tag and a Folder are similar within Sightline, there are differences. Tags are used primarily during review to categorize and classify documents. These would be your Responsive and Not Responsive choices. Folders are used to organize data. A Folder, for example, would be used to gather all the documents for a production, or for another attorney to view. Documents can exist in multiple Folders at one time within Sightline.

Manage Tags and Folders Page

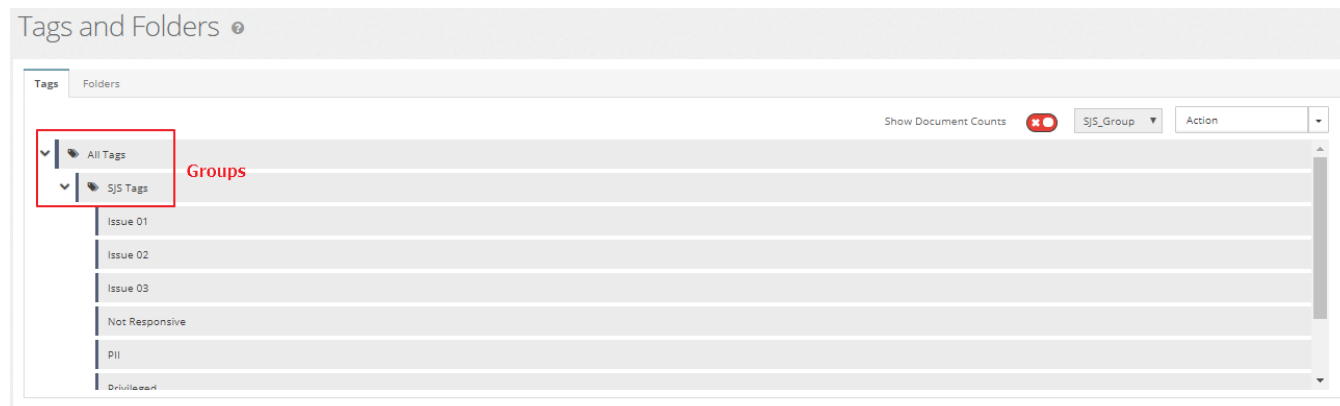
To create a Tag or Folder, navigate to Manage->Tags and Folders.

- Tags either yes or no; Check box vs Radio button are controlled in the Coding Form
- Folders work the same way, but cannot be put into Coding Forms



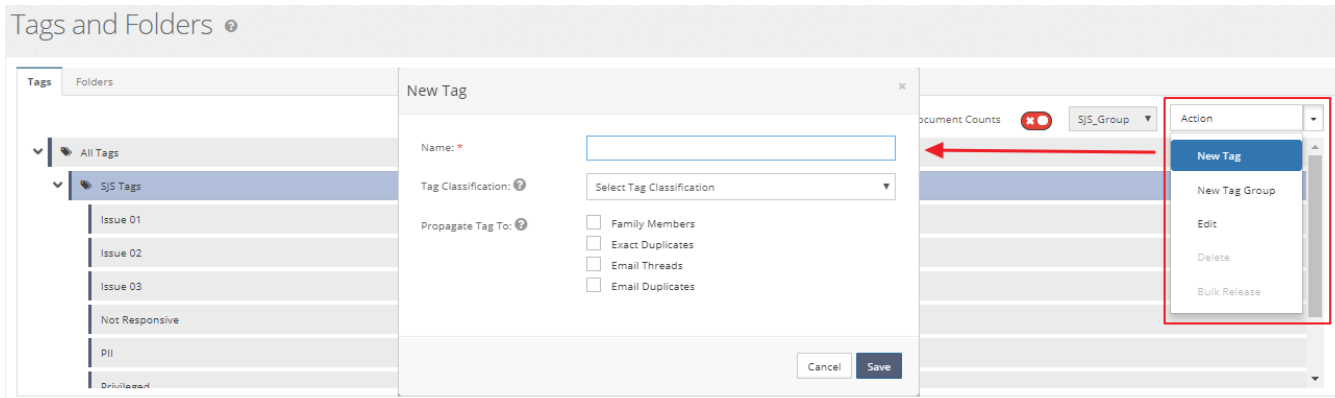
Tag and Folder Groups

You can create a Tag or Folder Group to group tags or folders together. For Tags this has no correlation to the layout in the Coding Forms, it is organizational only.



Creating Tags and Folders

To create a Tag or Folder, click on the Group in which you wish to create the Tag or Folder and click Action and then New Tag or New Folder. The New Tag or New Folder window opens.



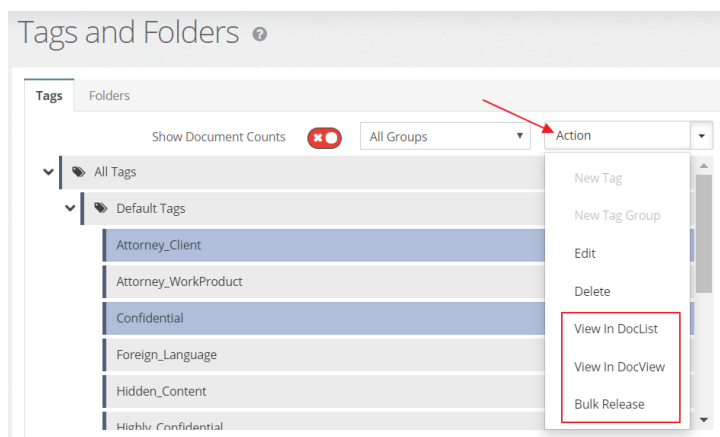
You can give The Tag or Folder a name and set propagation from this window. For Tags you can also apply a Classification for searching and reporting purposes.

- The Tag Classification is used in Reporting to aggregate and present tag count summaries and used in the productions for privileged docs. This is an optional field but is highly recommend.
- You can set the propagation to:
 - Family members: The Tag will populate for the whole document Family
 - Exact Duplicates: The tag will populate to exact MD5 matches
 - Email Threads: The tag will populate to the entire email thread
 - Email Duplicates: An email duplicate are emails that have the same. (1) From Email Address, (2) Subject, (3) Sent Date, (4) Attachment Hash Values, and (5) Body Text

Interacting with Tags and Folders

In addition to being able to create Tags and Folders – and their respective Groups – you can also interact with the documents in a Folder or that have a certain Tag applied.

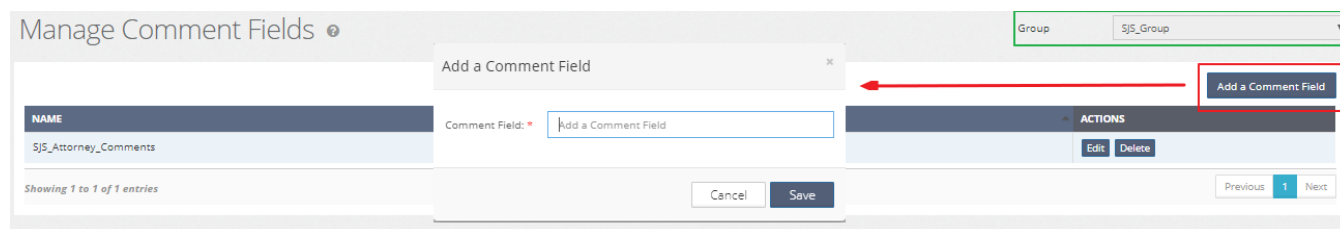
To interact with a Tag or Folder, simply select the Tag or Folder by clicking on your selection. You can select multiple Tags or Folders – or Groups – by pressing CTRL and clicking an additional selection. Once you have made your selection you can click on the Action dropdown in the upper right to interact with the documents.



From the Action dropdown you can View the Documents in the DocList or the DocView. As a Project Administrator you can also Bulk Release the documents. If you are logged in as a Review Manager, in place of Bulk Release you will see the option to Bulk Assign.

Comment Boxes

If you wish to include a Comment box in your Coding Form, you must create the Comment first by going to Manage -> Comments. Ensure you are in the correct Security Group (Green box) and then click Add a Comment Field (Red box). The Add a Comment Field window will open, and you can give the field a name and click Save.



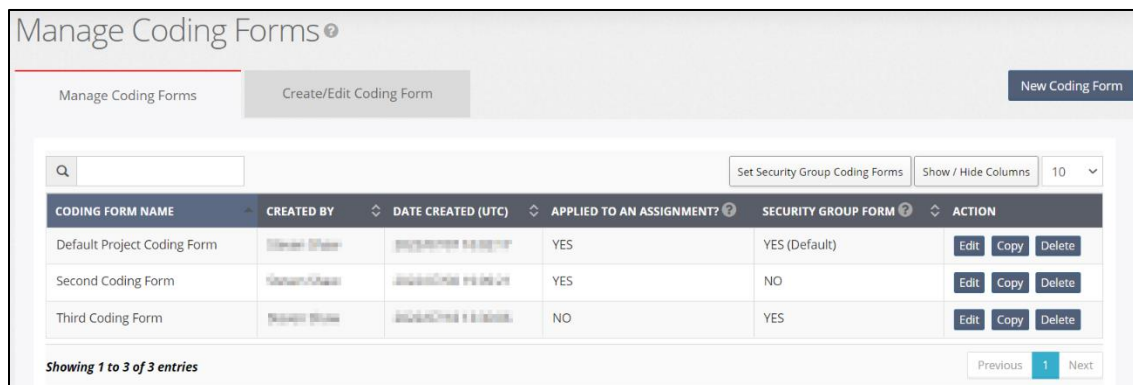
Create and Edit a Coding Form

Once the Tags are set, you can start to build a Coding Form. Go to Manage -> Coding Forms.

The Manage Coding Forms Page allows the User to Manage the existing Coding Forms, Create and Edit Coding Forms, and set the Security Group Coding Forms. The headers on the Manage Coding Forms tab show the name of the Coding Form, who created it, the date it was created (in UTC), whether the Coding Form is applied to an Assignment, and whether it is available from the DocView dropdown.

The last column allows the use to Edit, Copy, or Delete an existing Coding Form.

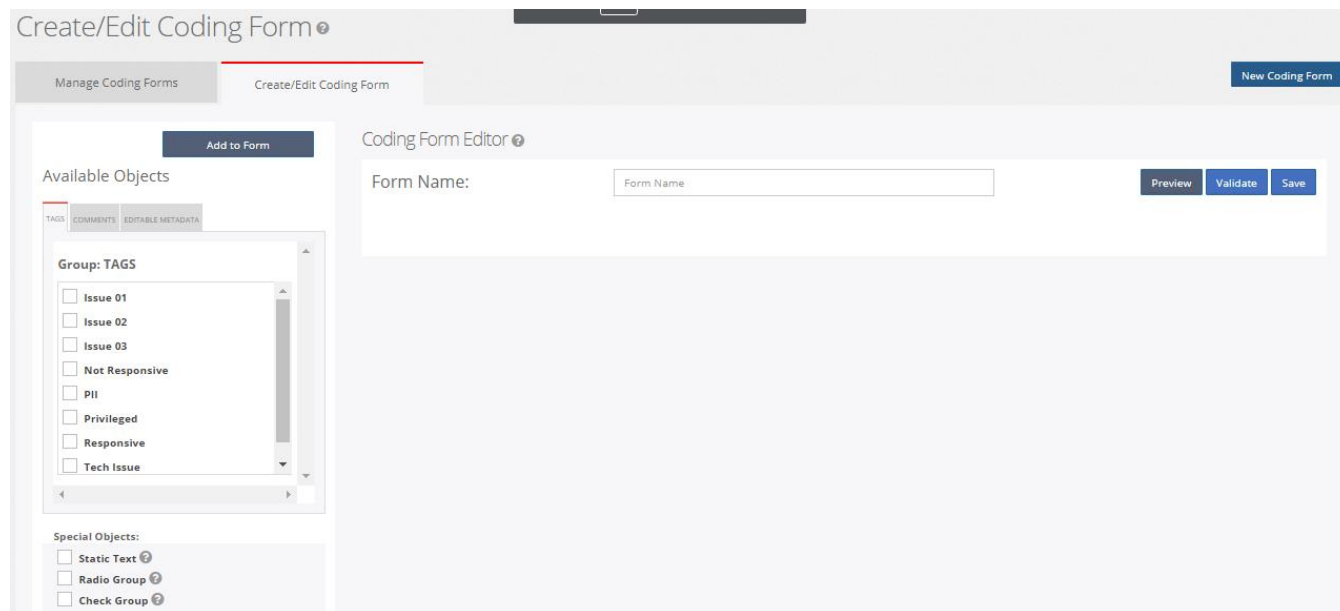
- Edit allows you to edit an existing Coding Form
- Copy makes a Copy of the selected Coding Form
- Delete will delete the selected Coding Form
- To create a new Coding Form, click the New Coding Form button



Create/Edit Coding Forms

In the Create/Edit Coding Form Page you will see two main areas:

- The Left Side contains the list of available objects
 - This is broken into three tabs; Tags, Comments, and Editable Metadata
- Below this are the Special Objects
 - Static Text allows you to place a block of Text in the Coding Form
 - Radio Group creates a Group of Tags in which only one Tag can be selected at once
 - Check Group creates a Group of Tags in which one or more Tags can be selected at a time
- The main section on the right shows you the Coding Form you are creating
 - From here you can Name, Preview, Validate and Save the Form
 - Name gives the Coding Form a visible name
 - Preview allows you to view the Form as the Reviewers would see it and also allows you to try out tagging options to see how in functions
 - Validate will go through any rules you have set up to see that they are valid
 - Save will Save the form

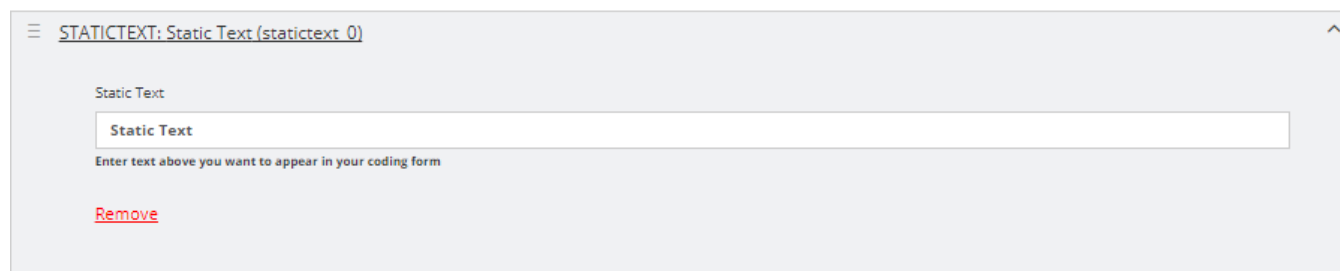


Building a Coding Form

While not a requirement, Consilio best practice is to layout the Coding Form by starting with any Static Text and Groups first, and then adding the appropriate tags to each Group.

Static Text

The Static Text is a text box that allows you to place a header for Coding Groups or any other text notice for the Reviewers. For instance, if you have a Coding Form that includes Responsiveness and Issue Coding, you could create two Static Text fields with those headers.

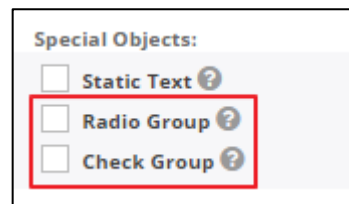


Once you have the Static Text in place, you can then set up the Coding Groups. In this example we would set up two Groups, one for Responsiveness and one for Issue Coding.

Coding Groups

When you create a Coding Group there are two options:

- Radio Group - You can only choose one of the Tags within the Group
- Check Group - You can choose one or more of the Tags within the Group

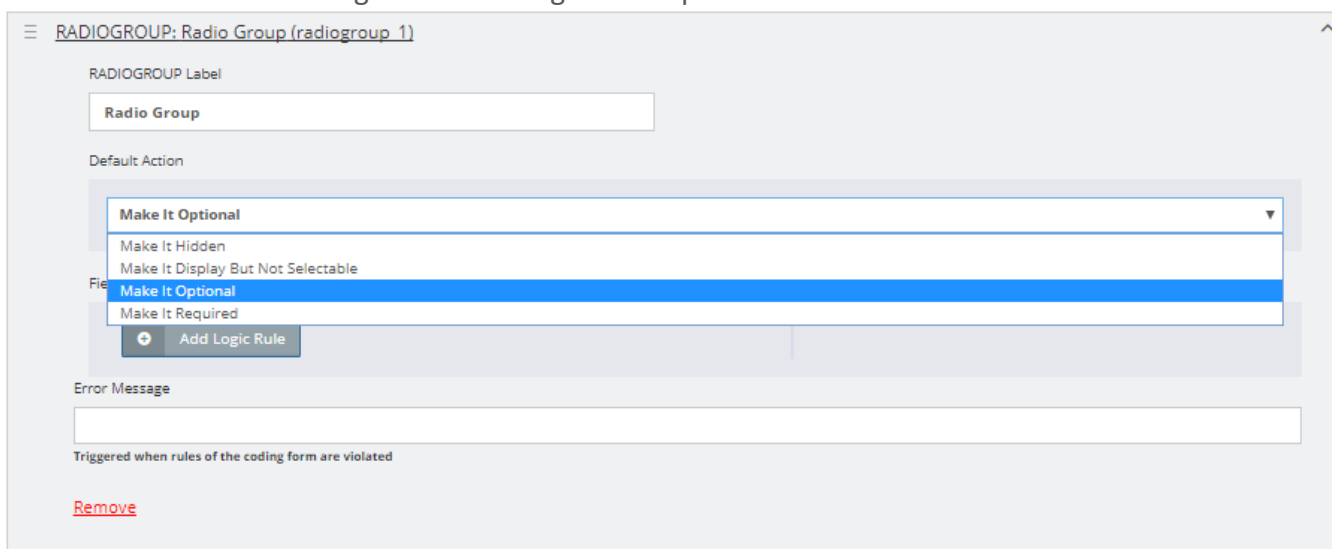


Once you choose the type of Group you want, you select it and click Add to Form.

The Group has several options:

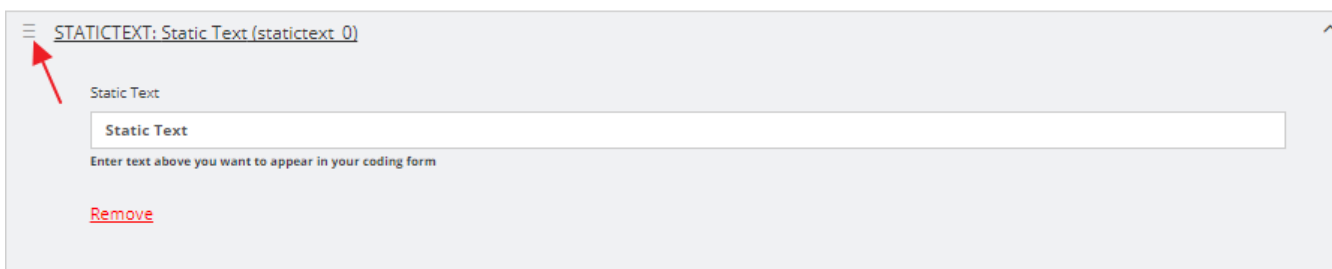
- Label - the name of the Group. This is not visible. You will need to add a Static Text box to put a label on the Group that is visible in the Coding Form
- Instruction Text – The Visible text within the Group. Can be either a group label or instructions.
- Default Action - This is how the Group will act
 - Make it Hidden - The Group is hidden, but can be revealed through other actions
 - Make it Display but not Selectable - The Group will be seen in the Form, but you cannot select any of the Tags
 - Make it Optional - You do not have make a selection from the Group
 - Make it Required - You must make a selection from the Group

- Field Logic - The Group can also employ logic to make the Group function in different ways.
 - Object - Chose a Group or Tag
 - Condition - The Object is Selected or Not Selected
 - Action - When the Object is Selected, or Not Selected this Action will happen
 - Make This Hidden - If the criteria are met, the Group will be hidden from view
 - Make This Read Only - If the criteria are met, the Group will be visible, but the user will not be able to make a Tag selection
 - Make this Optional - If the criteria are met, the Group will be Optional for the user
 - Make this Required - If the criteria are met, the user must make a tagging selection from the Tags in the Group
 - Error Message - This message will be presented to the user if the criteria are not met



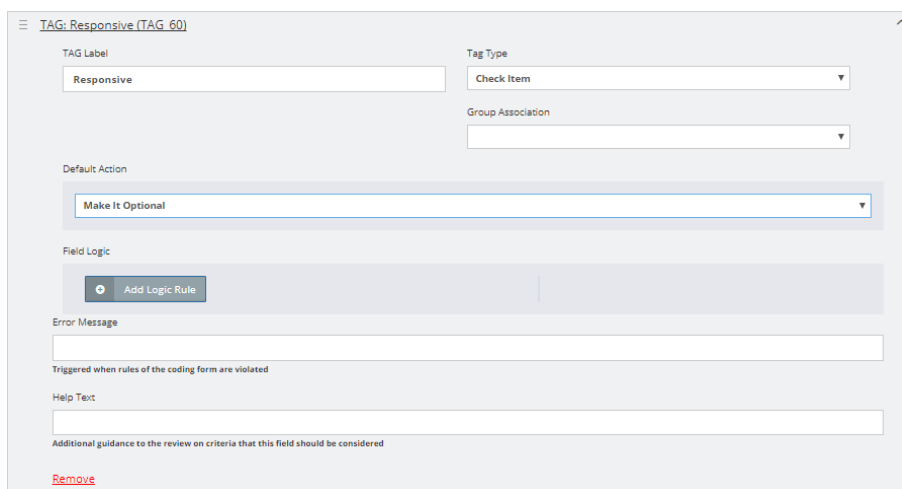
Build the Coding Form

Once the Groups are set, you can add the Tags, Comments or Editable Metadata. Select the Objects from the left and click Add to Form. Once the Objects have been added to the form, you can move them around by clicking and the holding the three lines then dragging the field to where you would like it to go.

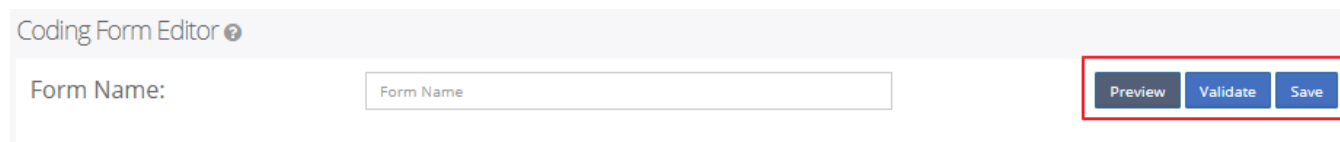


Once the Tag has been moved to the desired location, you must set up the Tag settings.

- Tag Label - This will carry over from the name you gave the Tag when it was created.
- Tag Type - The Type of Tag that this will be
 - Check Item - A check box for multi-select objects
 - Radio Item - A radio button for single select objects
- Group Association - This is where you associate a Tag with a Tag Group. A Tag does not need to be associated with a Group, so this does not need to be set. If you do choose to associate a Tag with a Tag Group, the remaining settings are controlled at the Group level.
- Default Action - The same settings as above under the Group Settings
- Field Logic - The same settings as above under the Group Settings
- Error Message - The same as above under the Group Settings
- Help Text - The RMU can put instructions on using the Tag, or guidelines on the criteria. This appears as a popup when you hover the mouse over the Tag

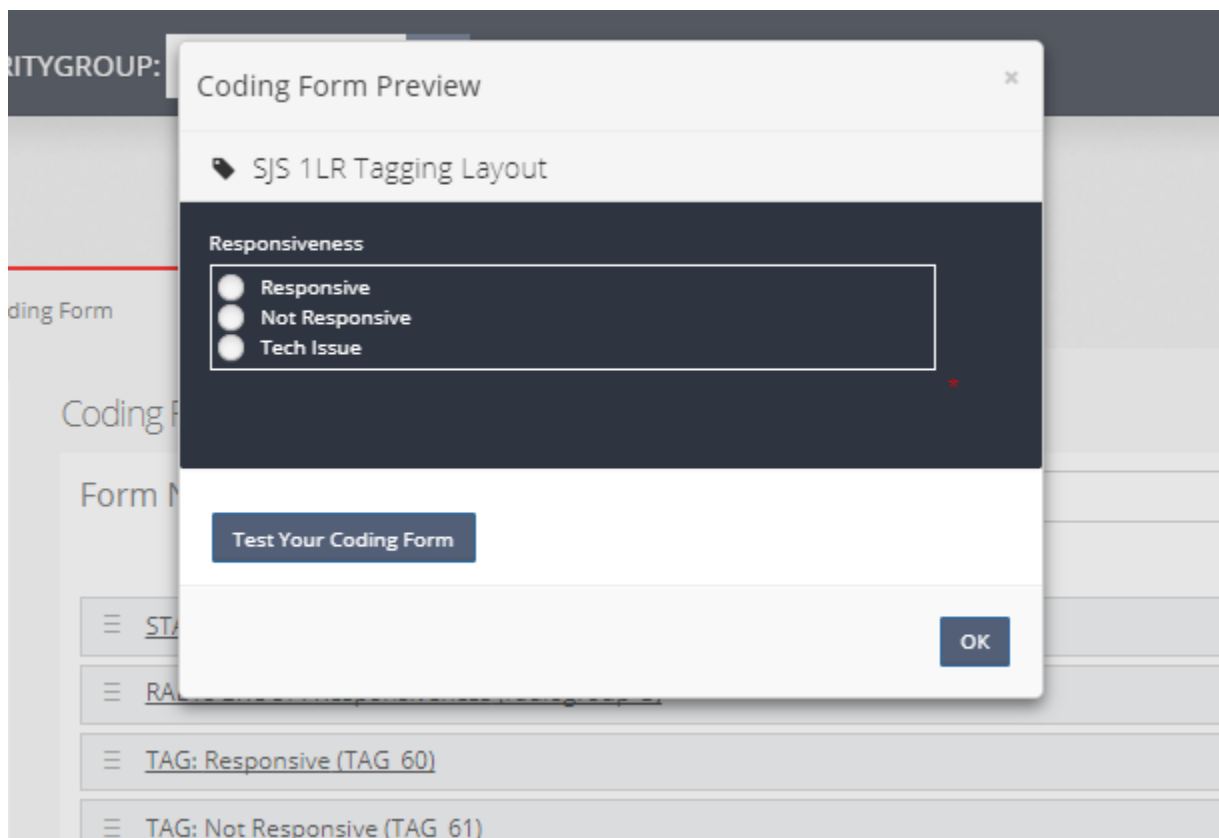


Test and Validate



Once the Coding Form is completed, you can now Test and Validate your Form. The Validate button will check the logic of the various settings. If, for example, you have a required Tag Group, but you failed to associate any Tags with it, you will get an error message. The Form will also Validate when you click Save.

Coding Form Preview

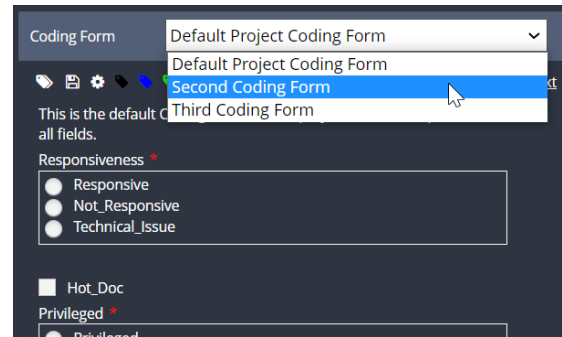


You can also Preview the Coding Form by selecting the Preview button. Once clicked, Sightline will open another window with the Coding Form as it would appear to the User. From here you can test various tagging options to see if the Form behaves the way it was intended. Once you have selected the tagging configuration you wish to test, you can click Test Your Coding Form. This will test the configuration you have selected and will provide feedback.

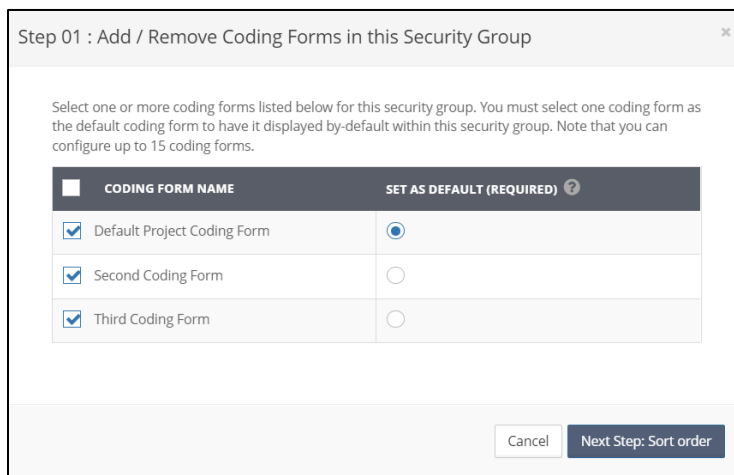
Security Group Coding Forms

Now that there are several Coding Forms in the database, you can select which ones will be available to users in the DocView when viewing documents outside of an Assignment. Within Assignments, the Coding Forms that are available are controlled by Manage -> Assignments. This is covered in the Assignments documentation for Sightline.

Sightline allows for up to 15 Coding Forms to be available to users in DocView at one time. By setting the Security Group Coding Forms you can control which Coding Forms are available via the dropdown menu, and the sort order of them within the dropdown.



Click the button to Set Security Group Coding Forms Set Security Group Coding Forms from the Managing Coding Forms Page. There must be two or more Coding Forms created to use this option. This will open a window to control which Coding Forms are available, and the sort order.

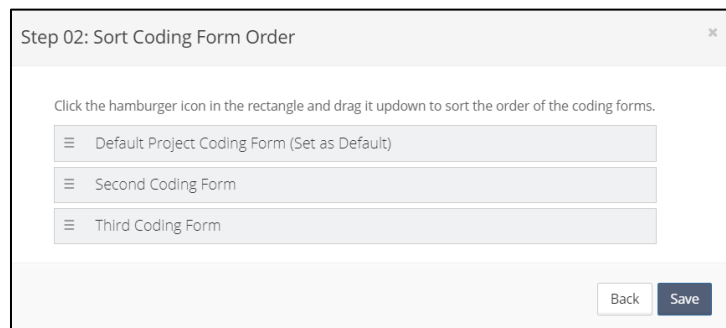


In Step 01 you will select which Coding Forms will be available to the Users of the Security Group outside of an Assignment by selecting the checkbox next to the Coding Form Name. To select all coding forms, click the checkbox in the header. Then, you will select one Coding Form to be the Default Coding Form. The Default Coding Form is the one that is selected when first entering the DocView and has certain controls associated with it when coding documents

(see next section [The Default Coding Form](#)).

Once the Coding Forms have been selected, click Next Step: Sort Order to move to the next window.

The Coding Forms selected from the previous window will be displayed in the list. Use the hamburger icons (3 lines) to drag the Coding Forms into the desired sort order. Once finished, click Save. You may also click Back to select different Coding Forms.



The Default Coding Form

While a User can apply coding using Save and Complete for all the configured Coding Forms, the “Code Same as Last” button and the Code Sync options under the Analytics and Review Mode are only available to the Default Coding Form. The “Code Same as Last” and Code Sync options are hidden when the user selects any non-default coding form. When the user applies “Code Same as Last” for a document, the application applies the coding from the last time the default coding form was used.

The coding stamps can be configured individually for each of the coding forms. Each saved coding stamp is associated with the corresponding coding form under which the stamp was saved.

When multiple Coding Forms are configured in an Assignment, the ability to automatically “Complete” a document when a Coding Stamp is applied will not be available. The toggle to enable automatic completion is greyed out in the Assignment configuration.

In DocView, either from an Assignment or otherwise, when a User switches from one Coding Form to another, if the coding was not saved, the application warns the user about the loss of unsaved data. An optional toggle is provided in the Assignment configuration, to enable it to automatically save the unsaved data in a Coding Form when the user switches to a different coding form.