DOMAIN ADMIN DASHBOARD

Sightline Help Documentation

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Domain Admin User

Sightline offers its multi-matter clients the ability to view their entire portfolio of projects from a single dashboard as a Domain Admin User. As with all user levels in Sightline, Domain Admin Users can impersonate down to Project Admins, Review Managers or Reviewers to conduct work at that level.

The Domain User has access to the Domain Dashboard which provides metrics on the last activity on all active projects, the size of the top five workspaces and a breakdown of the total size by database, index and workspace, the number of users – both active and inactive – and a full listing of information related to each database, along with a customizable view that can be saved and exported.

Domain Admin Dashboard

The Domain Dashboard provides the Domain Admin User with a single place to view different aspects of the Domain and initiate certain actions on the Domain Projects. The widgets in the top half of the dashboard provide Domain level views going across projects including the recently active projects in the Domain, the disk utilization of the Domain, and the active users in the Domain. The metrics presented in these widgets represents all active projects in the Domain. Note that the metrics presented in the dashboard are refreshed daily at 2 am EST (US) and 2 am BST (UK).

The grid in the bottom half of the dashboard gives a tabular view of the projects in the Domain and provides key attributes for each listed project. The Domain Admin can also customize the project summary grid to view the columns of interest and hide those that they do not want presented.

If the Domain Admin has access to more than one Domain, they will be listed in the dropdown at the top of the dashboard.
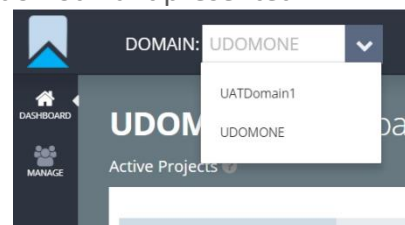
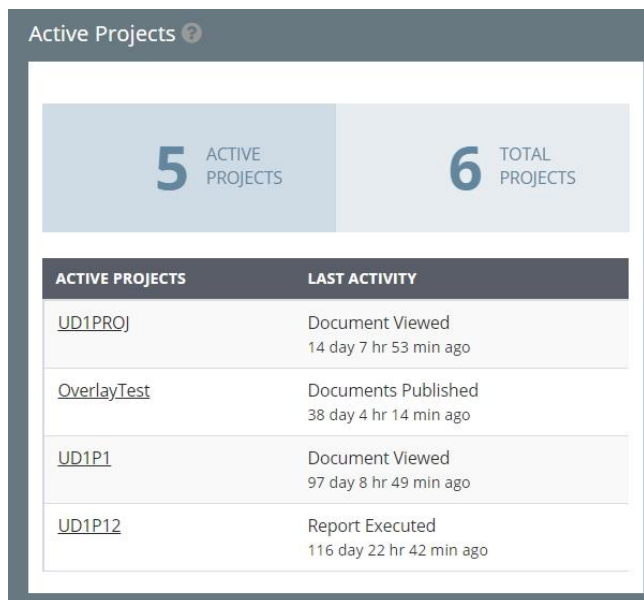The dashboard also provides the Domain Admin with the ability to perform certain actions on the grid:

- Display Inactive Projects: By default, only active projects in the Domain will be displayed in the project summary grid. When the user turns this toggle on, the grid also displays the inactive projects in addition to the active ones.
- Project Filter: The user can filter on the projects displayed in the grid, by project name.
- Create New Project: The Domain Admin can initiate a new project creation from the Domain dashboard page. This will take the user to the Add New Project UI using which the user can add a new project in the Domain.

- Export: The user can export the project summary grid to a spreadsheet. When the user does so, in addition to the columns presented in the grid, the application also exports listing of all custodian names in the project as an additional column to the spreadsheet , which is not presented in the project summary.
- Customize: The customize action allows the Domain Admin to select those columns that they want displayed in the project summary grid. The user can choose to save this column customization, following which the application will remember and present the customized grid when the user logs in the next time.
- Go To Project: The user can click on the project name in the project summary grid. On selecting the option to 'Go To' the selected project, the user will be impersonated and taken to the selected project as a Project Administrator.
- Deactivate: By selecting Deactivate after clicking on the project name link, the Domain Admin can deactivate a project. On doing so, the selected project will be marked inactive.

Dashboard Widgets

The Domain Admin Dashboard is comprised of 3 widgets; Active Projects, Active Projects Utilization, and Users in Active Projects.

Active Projects

This widget gives the Domain Admin a view into the active projects in the Domain and lists those projects that are more active along with their corresponding most recent activity in the project.

The top header bar in this widget presents the count of the active projects and the total number of projects in the Domain.

The table below the header presents the top 4 projects in the Domain based on the most recent activity in the projects across the Domain.
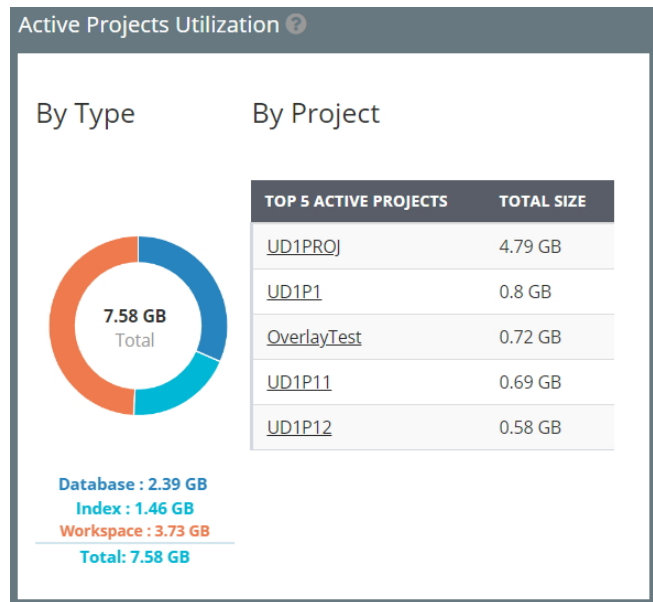
For each of the 4 projects, it also lists the most recent activity that occurred in the project.

To access any of the Active Projects listed, simply click on the project name and you will enter that project as a Project Admin User (PAU).

Active Projects Utilization

This widget presents the Domain's total utilization of disk space - By Type and By Project.

- By Type: The utilization by type presents a ring with the total disk space utilized by the Domain. This is further broken down, below the ring, to give the Domain's utilization of database, index and workspace disk space. These disk spaces represent the corresponding aggregate utilizations in all the active projects in the Domain.

- By Project: The utilization by project presents a table with the top 5 projects in the Domain in terms of the total utilized disk space by each project.

Active Projects Utilization ⊘

By Type   By Project

7.58 GB
Total

TOP 5 ACTIVE PROJECTS	TOTAL SIZE
UD1PROJ	4.79 GB
UD1P1	0.8 GB
OverlayTest	0.72 GB
UD1P11	0.69 GB
UD1P12	0.58 GB

Database : 2.39 GB
Index : 1.46 GB
Workspace : 3.73 GB
Total: 7.58 GB

Users in Active Projects ⊘

5 ACTIVE USERS	**5** TOTAL USERS

By Active Project

Users in Active Projects

This widget gives the Domain Admin a view into the active users in the Domain and presents the top 5 projects in terms of the number of active users.

The top header bar in this widget presents the count of the active unique users in the Domain i.e. users currently enabled to login and work in a project in the Domain. It also lists the total users in the Domain, which includes those users that are marked inactive.

The table below the header presents the top 5 projects in the Domain based on the number of active users associated with the project. Each bar in this table represents a project and hovering over the bar gives the count of active users and inactive users in the project.

Projects List View

Below the widgets is the list of projects within the Domain. This section lists all the projects under the Domain along with all associated fielded information including Project Name, Total Utilized Disk Size, Corporate Client and the Created Date. From this section the Domain Admin can search for a Project in the search box, create a new project by clicking on that button, export the table into a downloadable spreadsheet, save the current view and adjust the viewable fields by clicking on the gear.

Table Fields

The columns of the Project List View can be customized for the Domain Admin. By selecting the gear on the upper right-hand corner of the table, the Domain Admin can control which fields are visible.

The Domain Admin can add or remove fields by checking or unchecking the checkboxes next to each field name. The field names contain the unit measurement (where applicable) and, in some instances, a brief description of the field viewable by clicking on the "?" next to the field name.
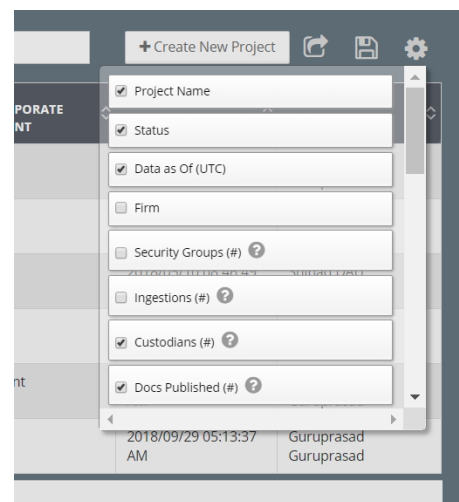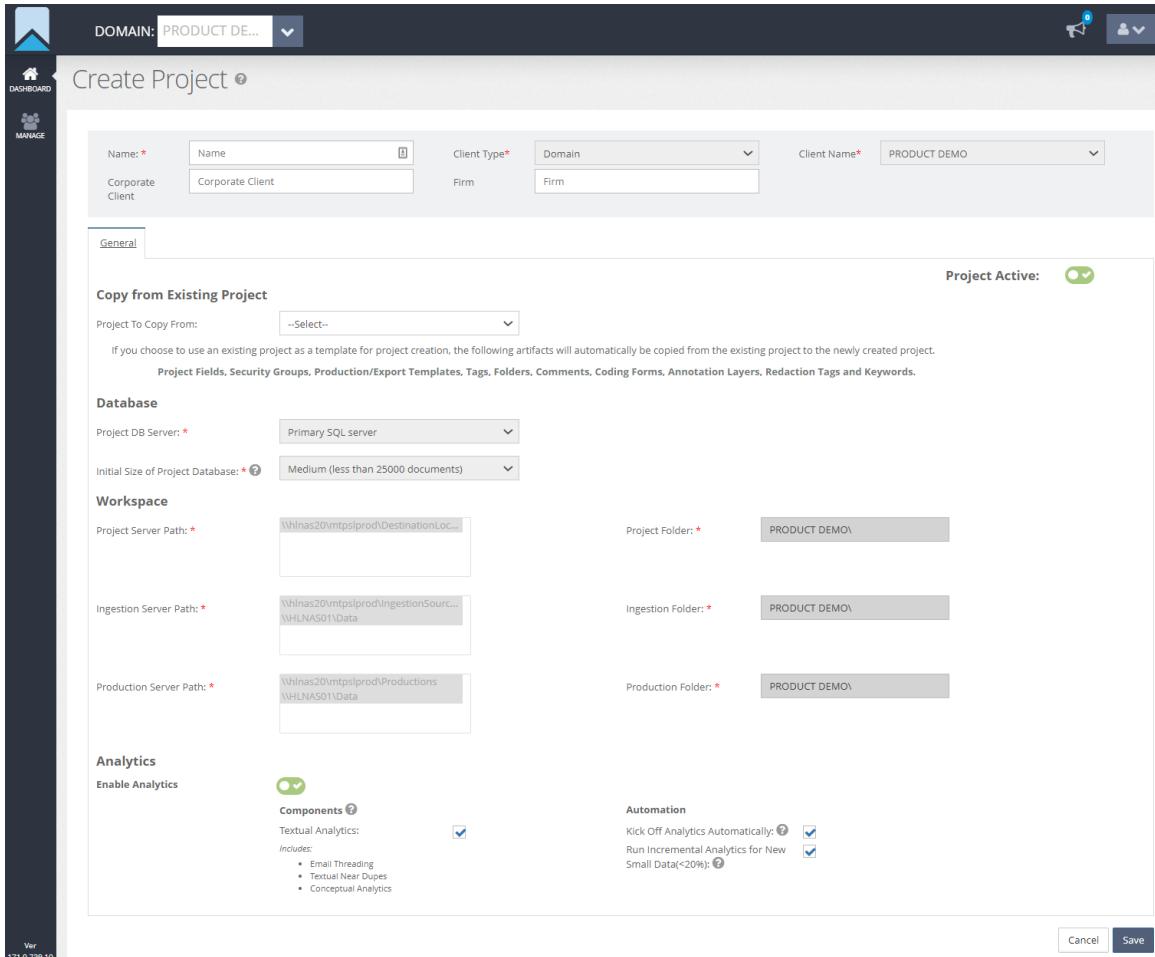
List of Fielded Project Information

- Project Name
- Status
- Data as Of (UTC)
- Firm
- Security Groups (#)
- Ingestions (#)
- Custodians (#)
- Docs Published (#)
- Docs Released (#)
- Docs Responsive (#)
- Docs Privileged (#)
- Docs in 1LR Assignments (#)
- # of Docs Completed in 1LR
- # of Docs in 2LR Assignments
- # Docs 2LR Completed
- # of Docs Produced
- Last Recorded User Login Activity
- Last Recorded Activity On Any Document
- Corporate Client
- Created Date
- Created By
- Billable Users (#)
- Current Month Peak Billable Users (#)
- Total Utilized Disk Size (GB)
- Total DB Size (GB)
- Total Search Index Size (GB)
- Total Workspace Size (GB)

- Total Analytics Index Size (GB)
- Aggregate File Size (GB) of Natives Published (Hash Dupes)
- Aggregate File Size (GB) of Natives Published Not Released
- Aggregate File Size (GB) of Natives Released
- Aggregate File Size (GB) of Translations Published
- Aggregate File Size (GB) of Text Published
- Aggregate File Size (GB) of Generated PDFs Published
- Aggregate File Size (GB) of Generated PDFs Released
- Aggregate File Size (GB) of Generated PDFs Published Not Released
- Aggregate File Size (GB) of Mapped TIFFs
- Aggregate File Size (GB) of Mapped PDFs
- Aggregate File Size (GB) of Mapped Natives
- Aggregate File Size (GB) of Produced PDFs/TIFFs
- Aggregate Size (GB) of Audio Natives
- Aggregate Size (GB) of MP3 File Variants
- Total Audio Original Duration (Hrs)
- Total Audio Duration (Hrs) with Deadspace Trimmed
- Total Audio Duration (Hrs) in Phonetic Index

Create a New Project

The Doman Admin User can partition their own new projects by clicking on the "+ Create New Project" button in the upper right-hand corner of the Project List View. This will bring the user to the Create Project Page. From this page the Domain Admin can create a new project under their Domain.

To create a new project the Domain Admin should fill out the information listed. Those fields with asterisks are required. Some fields are preset by Sightline as they relate to the Domain.

Fields for Creating a New Project
- Name: The name of the new project (required)
- Client Type: Set to Domain for Doman Projects (preset by Sightline)
- Client Name: Set to the Doman Admin's client (preset by sightline)
- Corporate Client: The name of the corporate client associated with the new project
- Firm: The name of the firm associated with the new project

Below the fields for creating a new database is the General section, consisting of four main areas: Copy from Existing Project, Database, Workspace, and Analytics.

Copy from Existing Project

The User also has the option of creating a new project using another project as its template. If you choose this option, Sightline will also automatically make replicas of certain objects from the source template project. Once the project creation is completed, those objects that are replicated from the source template project will be available to use in the newly created project.

The objects that will be replicated from the template project are: Project Fields, Security Groups, Coding Forms, Tags, Folders, Comments, Production/Export Templates, Annotation Layers, Redaction Tags, Keywords. Additionally, the user also has a choice to optionally replicate the objects. These optional fields are Users, Saved Searches, Assignments, Reviewers mapped to Assignments.

Full information on using Copy from Existing Project can be found in the next section of this document.

Database

This area is preset by Sightline and locked from User changes. The initial size of the database is set to Medium for all projects, however, this will not limit the number of documents that can be uploaded into the project. This setting dictates the initial size of the blank database but can expand as required.

Workspace

This area is preset by Sightline and locked from User changes. This information is set by Consilio upon the creation of the engagement with the client.

Analytics

The Analytics Section can be used to turn off Analytics under special circumstances. Please do not use this section unless you have been trained by Consilio, or you have spoken to a Consilio team member. There are specialized workflows that exist in using this feature. If you are untrained in the use of this section, you can cause unexpected workflow changes that can affect your intended workflow.

Copying a New Project from a Template

When a Domain Administrator creates a project in Sightline, the "Create Project" page now presents an additional section entitled, "Copy from Existing Project". If the user wants to continue to create a

project that does not use another project as a template, they can just ignore this section and continue with filling the rest of the page as done previously. If the user would like to use a template project, they should select a project from the list of presented projects in "Project to Copy From". The list of projects presented are the other projects that have been created within the Domain.
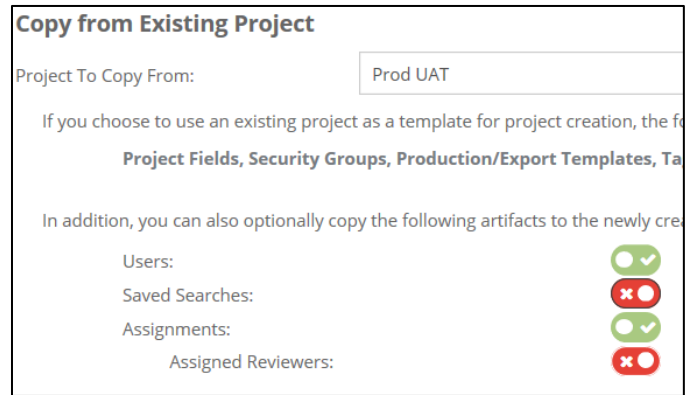

Below the "Project to Copy From" dropdown, the system lists all the artifacts that will get copied as part of the template project.

Once the user picks the project to use as the template from the dropdown, they can choose the additional fields to copy from the template project. These fields are: Users, Saved Searches, Assignments and Assigned Reviewers. In order to copy the Assigned Reviewers, the user must first choose to copy Users and Assignments. Once these selections have been made, the user can fill the rest of the sections in "Create Project" and then click on 'Save' to initiate the creation of the project.
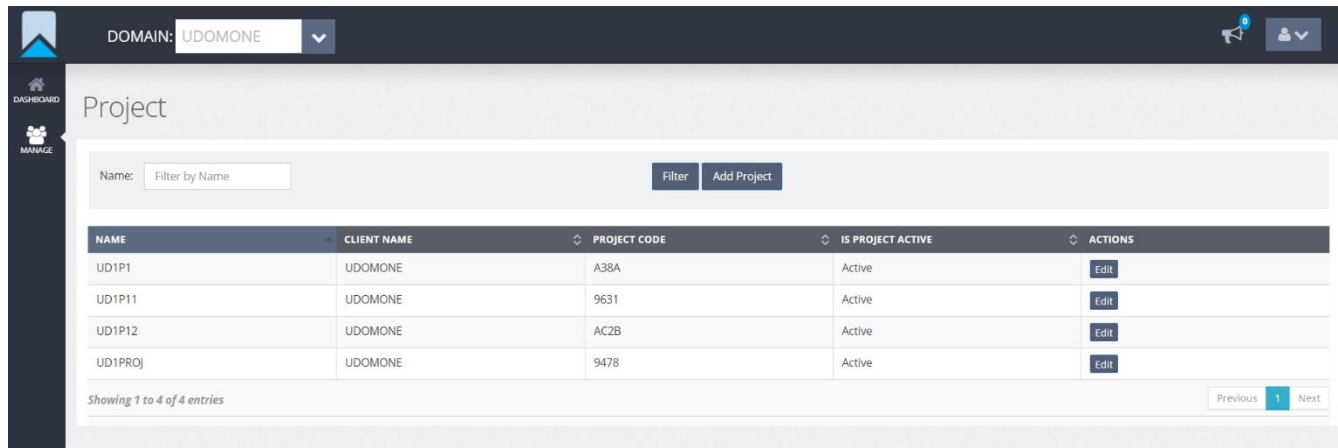
The Manage Menu

In addition to the Dashboard, the Domain Admin has access to the Manage Menu on the left-hand side. The Manage Menu provides access to the Manage Projects and Manage Users sections. They are available from the expanded menu when the user hovers the mouse over the Manage menu option.
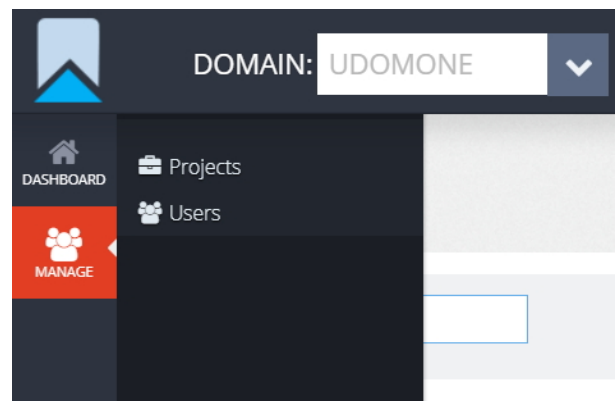
Manage Projects

The Manage Projects page allows the Domain Admin to see the list of active projects, edit any of the listed projects and add a new project. The Domain Admin can also filter by the project name using the search bar on the left.

Under the Actions column the Domain Admin can edit any of the projects in the Domain by clicking the button. This will open the project wizard and allow the Domain Admin to make changes.

Manage Users

The Manage Users page allows the Domain Admin to see the list of users across all projects under the Domain. The Domain Admin can also add new users to any project, remove users, and control user access. The table can be filtered by user role, status or creation date.
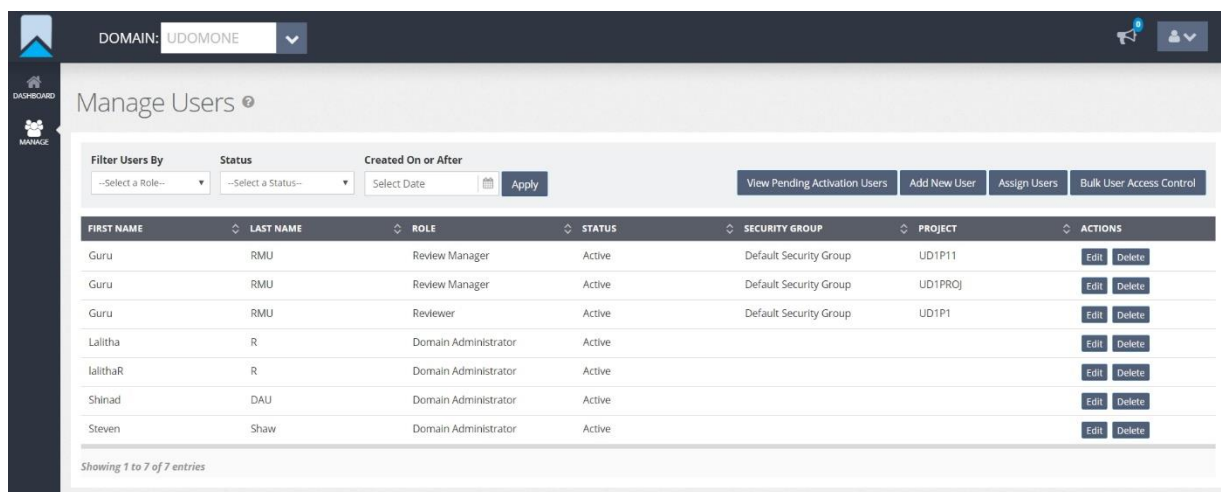

The Domain Admin can control access within the projects for all users within a Role or Security Group through the Bulk User Access Control. Clicking that button will open a window which will allow the Domain Admin the ability to bulk update access.

Modify Multiple User Profiles At Once

Sightline allows higher level users the ability to modify multiple user profiles for lower-level users at once, without having to modify each user profile one-by-one. To do so, follow these steps:

- Step 1: Select the Role of the users you wish to adjust. You can only adjust the same level (role) of users at one time. So, if you want to make a modification to a bunch of Review Managers and a bunch of Reviewers, you'll have to do that as two separate actions.
- Step 2: Select the Project (and the Security Group if you are modifying Review Manager and Reviewer user profiles). After completing this step, the application will automatically show you the specific users that meet your Role-Project-Security Group criteria in the lower block, entitled "Users".
- Step 3: Now, in the Users window, multi-select each individual user you want to make a modification to as part of this bulk update.
- Step 4: In the Rights topmost block, the application will show you the default profile for the Role you selected. Some options are greyed out and unselectable (ex. you can't give a Reviewer user access rights to Manage). Other boxes are pre-selected, and some are unselected by default.
- Step 5: Only consider which functionality you want to ADD to the selected users or REMOVE from the selected users. If you are ADDING functionality to each selected user, click the Enable radio button. Conversely, if you are REMOVING functionality from each selected user, click the Disable radio button. Using the multi-select options in the Rights block, determine which functionality you want to ADD (Enable) or REMOVE (Disable) from each selected user.
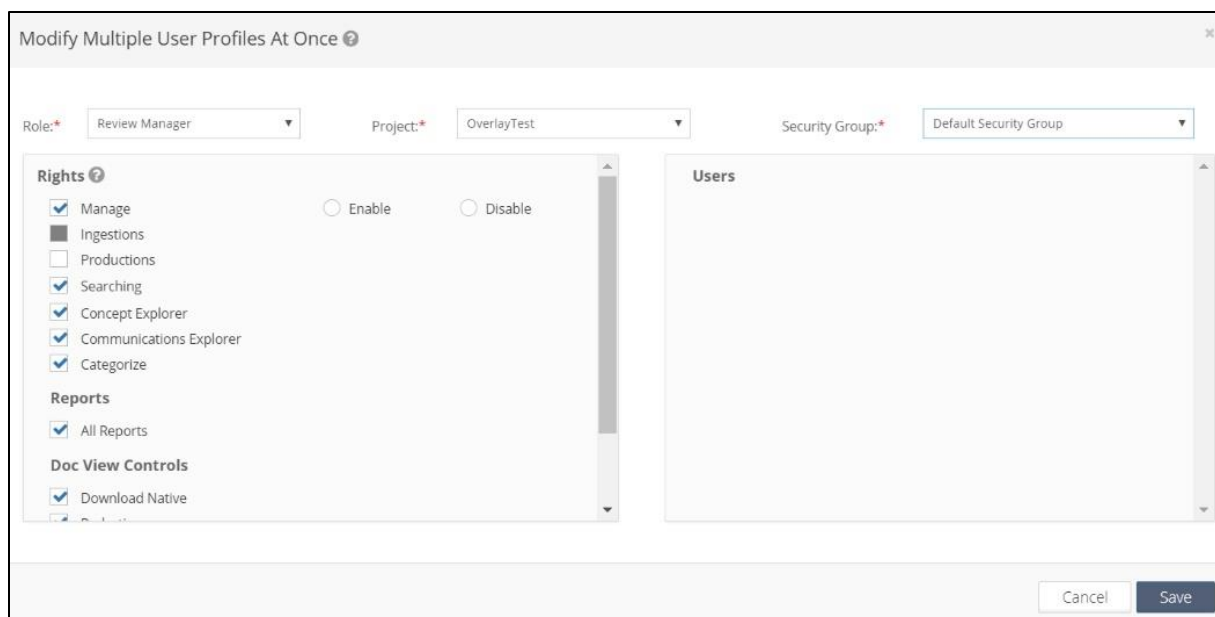
If, for example, you want to give each of three named Review Managers access to the Productions module you would set your Role at the top to "Review Manager" for the Project and Security Group where the users exist. Then, you would select the three Review Managers of choice. Next, you would click the Enable button and ONLY select the option "Productions". Then, click Save at the bottom right of the window. This would add the Productions module rights to each of the selected users within the Project and Security Group of your choosing.

The application is altering the Rights setting from each users' current state. The application will not Enable a right that is already presently Enabled. For example, if in the example above, one of the three Review Managers had previously been given rights to the Productions module, enabling the Productions module for that user will not have any negative/unwanted effect. If you are unsure about how to perform a bulk rights update for users, please contact your Project Manager.