SIGHTLINE QUICK START GUIDE

Getting from New Project to Review

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# Getting Started with Sightline

Sightline is a powerful tool to help navigate your eDiscovery process. Amongst its many strengths, is the ability to quickly start a new project, load data and start review. This document will provide a quick overview to get a Domain Administrator up and running quickly and efficiently.

The below guide can be used when planning to review all the uploaded data. If you wish to search and cull your data before review, please review our additional training materials, or reach out to your Consilio Specialist to assist with that more advanced workflow.

Starting a New Project

Log into Sightline using the credentials that were emailed. Your username will always be your email address and your password would have been set when you activated your account. If you cannot remember your password use the "Forgot Password?" link on the login page to reset your password.

Once you log in, you will be on the Domain Dashboard Page. From here you can navigate to below the User Widget and click "+ Create New Project". This will open the New Project page and allow you to create a new project within your Domain.
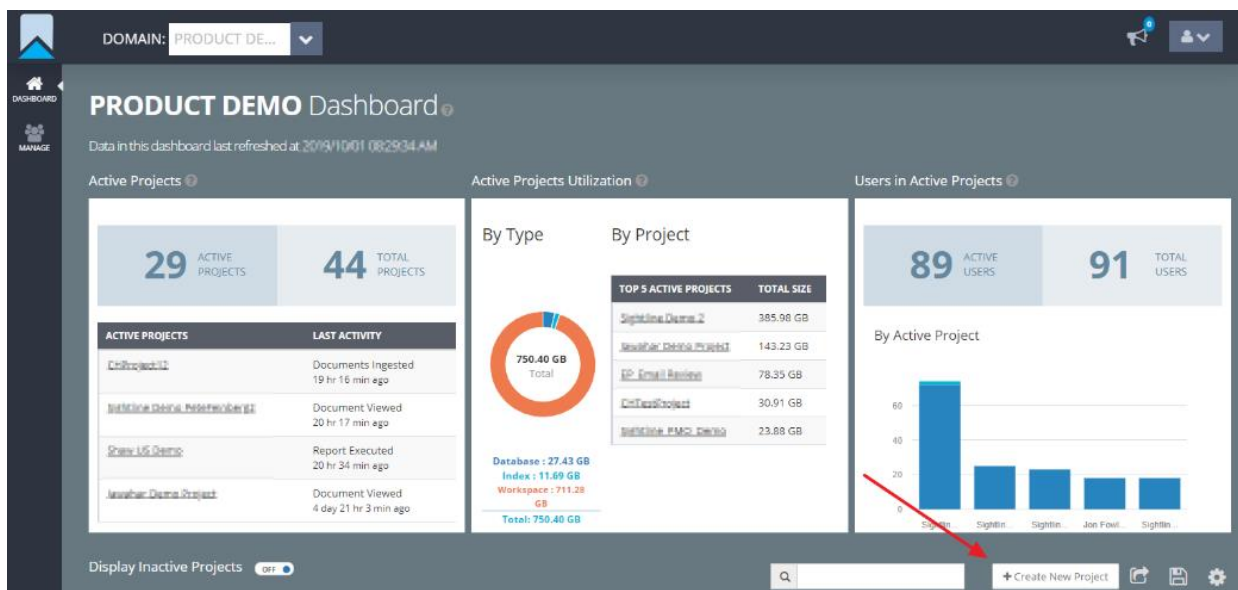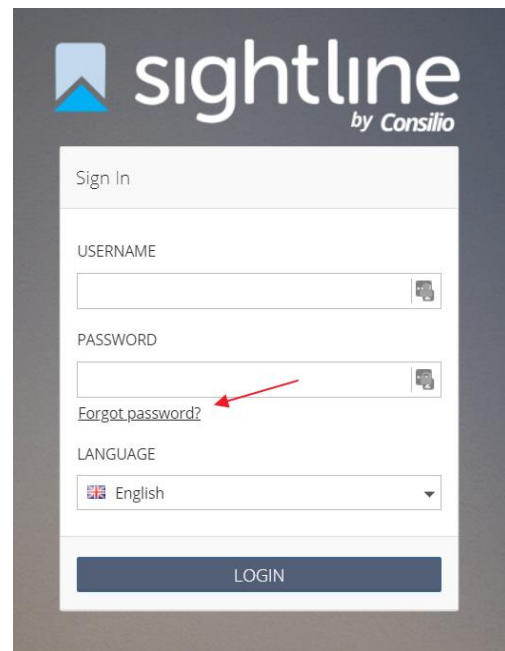
The only required information for a new project is a project name. The other fields are optional. Please leave the boxes checked for "Project Active", "Enable Analytics", "Textual Analytics", "Kick Off Analytics Automatically" and "Run Incremental Analytics for New Small Data(<20%)".
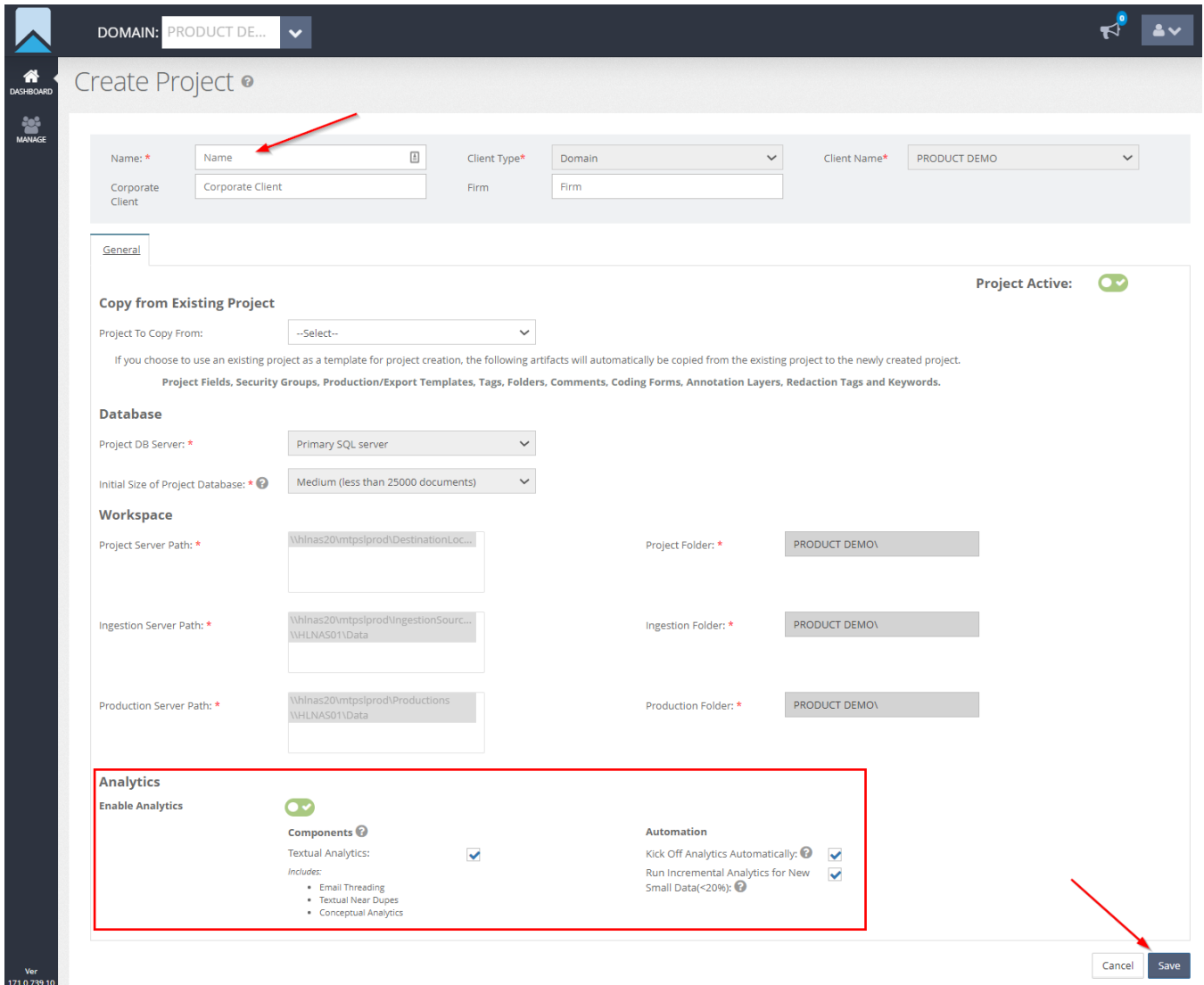

Once you have named the project, click the Save button to create the new project. The process takes approximately 5 – 10 minutes. You will receive a notification when the project is created, and you will see the project listed in the project list below the widgets on the Domain Dashboard.

Note: The Analytics Section (red box in the image above) 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 database changes that can affect your intended workflow.

Using Project Templates

If this is not your first project within the Domain, you may choose to use a previous project as a template for your new project. Under the "Copy from Existing Project" section, select the project you wish to copy from the dropdown.
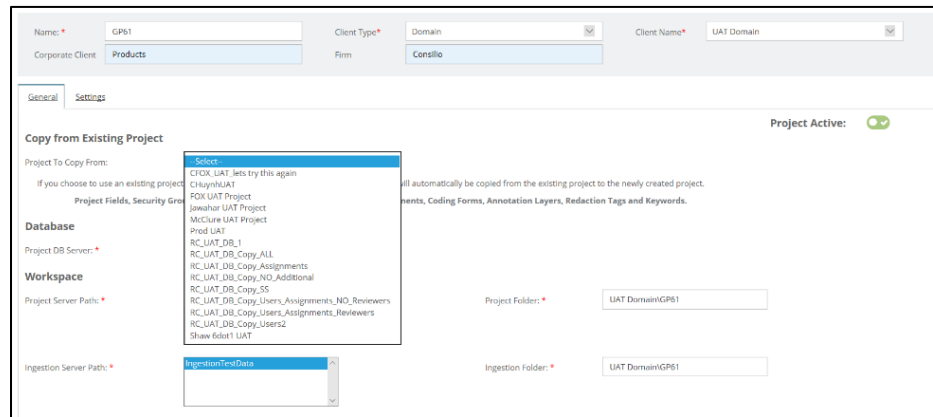
Using this option will automatically copy the Security Groups, Coding Forms, Tags, Folders, Comments, Production/Export Templates, Annotation Layers, Redaction Tags, and Keywords. Optionally, you may also choose to copy the Users, Saved Searches, Assignments, and Reviewers Mapped to Assignments. If you wish to select the Reviewers Mapped to Assignments, you must first choose Users and Assignments.

Access Your New Project

Once the project has been created, you can access the new project by clicking on the project name from the Project Details section below the widgets. You can search for your new project using the search bar next to the "+ New Project" button.

| PROJECT NAME	STATUS	DATA AS OF (UTC)	SECURITY GROUPS (#)	INGESTIONS (#)	CUSTODIANS (#)	DOCS PUBLISHED (#)	DOCS RELEASED (#)	DOCS PRIVILEGED (#)	DOCS IN 1LR ASSIGNMENTS (#)	# OF DOCS COMPLETED IN 1LR	# OF DOCS IN 2LR ASSIGNMENTS	# DOCS 2LR COMPLETED	# OF DOCS PRODUCED	TOTAL UTILIZED DISK SIZE (GB)
Sightline Demo 2	Active	2019/10/01 08:28:13 AM	10	7	24	131599	1417519	18742	135093	7003	577	153	81	385.98
Sightline Demo 3	Active	2019/10/01 08:28:21 AM	1	17	15	34767	1786	1074	1944	129	0	0	0	11.87

Process Data

From the new project, click the Datasets menu on the left-hand side to open the Datasets Page to begin uploading and processing data.

From the Datasets Page, click the link to "Create New Upload Dataset." This will open the New Dataset window.
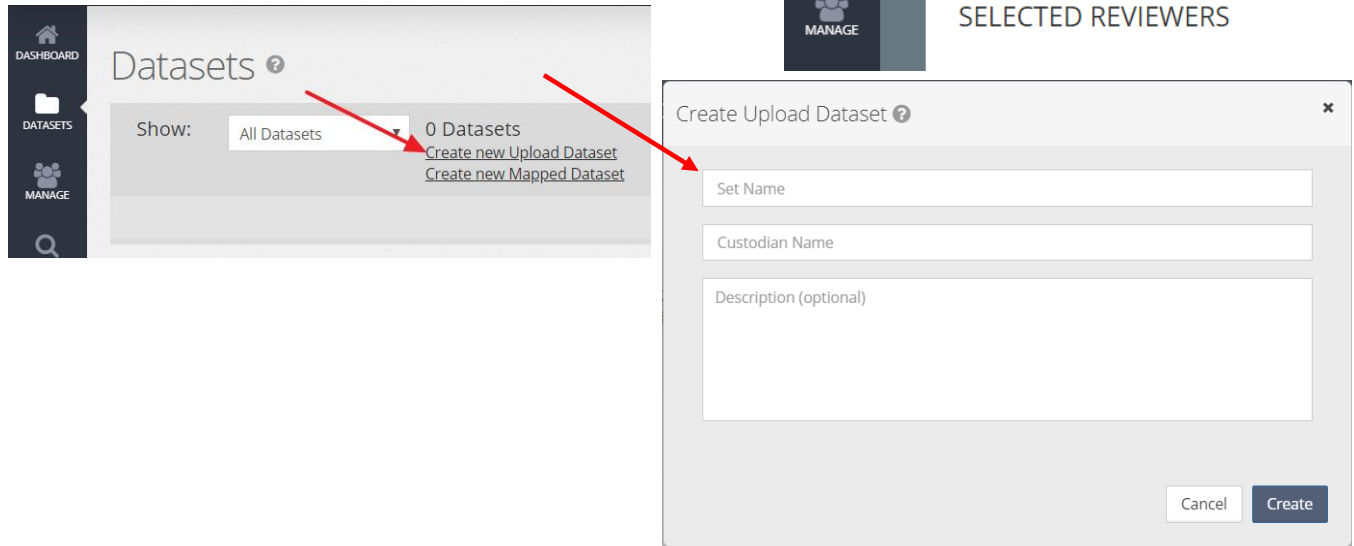
Using Multiple Tabs for Upload

When you click the "Create" button on the Create Upload Dataset window you will be presented with an option to open the new Dataset in a new Tab.
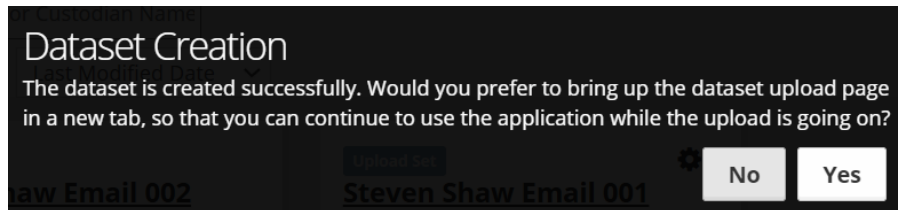
If you choose Yes, Sightline will automatically open the Dataset in a new browser tab. This will allow you to upload the data in one tab, while doing other work – searching, database management, creating and uploading additional data – in the original tab. If an upload active in the secondary tab, the User's session will not be timed out in the primary session. If for some reason the application faces any technical glitch in being able to launch the upload in a new tab upon the user's choice, it will then attempt to continue to bring up the upload in the primary tab itself.

If you choose No at this point, Sightline will open the Dataset in the original tab and you will not be able to navigate away from that page until the data has completed loading.

Create a New Upload Dataset

Datasets in Sightline are a collection of related data in a single group. A Dataset can be anything that you definite it as. Consilio's best practices are to limit a Dataset to a single Custodian and a single data type, e.g. John Doe Email, John Doe Laptop, Jane Doe Share Drive, etc. When naming a Dataset, Consilio recommends [Custodian Name] [File Type] [Counter], e.g. John Does Email 001.

A dataset can only have a single custodian value. If you are uploading data into a dataset for multiple custodians – e.g. a search across your internal email systems – you can simply add the Custodian value of, "No custodian", "Various" or your company name. The value will be assigned to all the data within that Dataset.

In the Create Upload Dataset window fill in the Name, using our suggested naming convention or your own, the Custodian and an optional Description. When done, click, "Create".
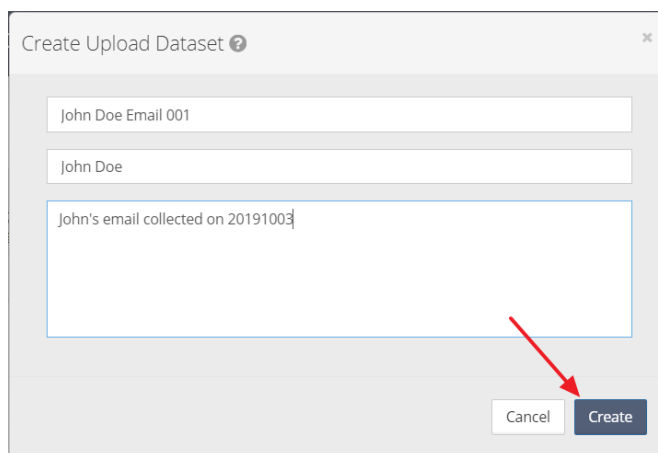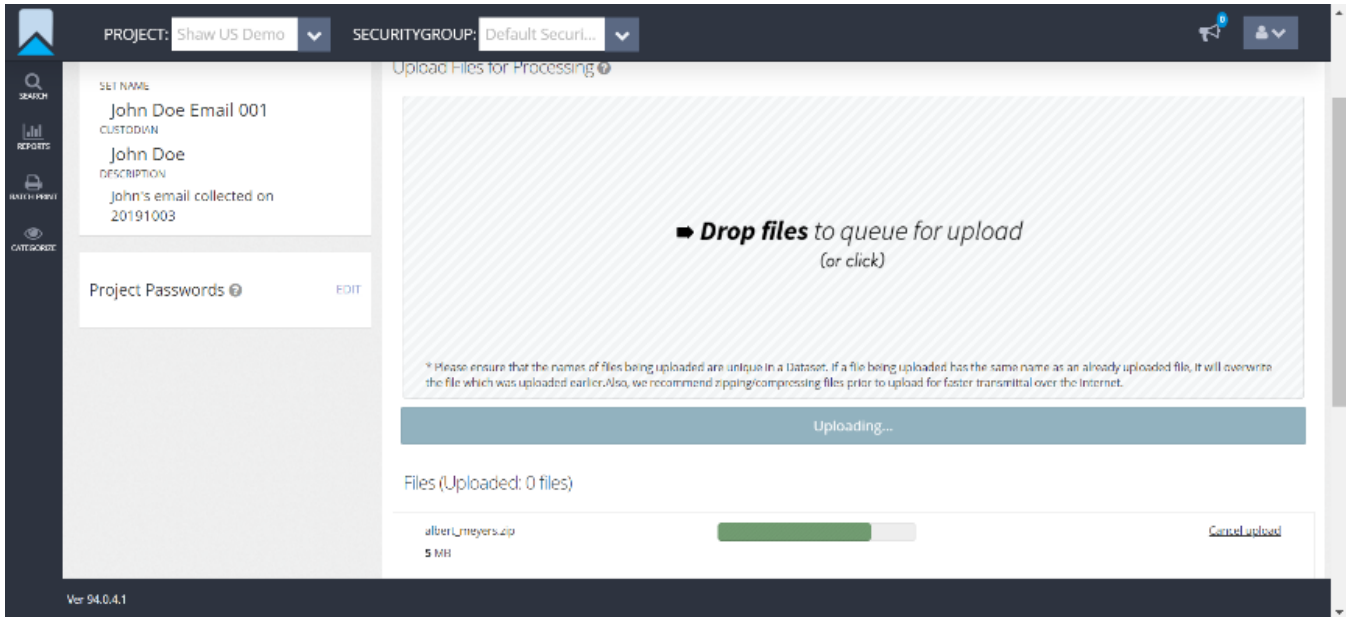
Uploading Data

Sightline utilizes Drag and Drop technology to upload and process data. After you create the dataset you will automatically be taken to the Dataset Upload page. From here you will drag the data you wish to process from your desktop into the area labeled, "Drop files to queue for upload." This will initiate the upload process.
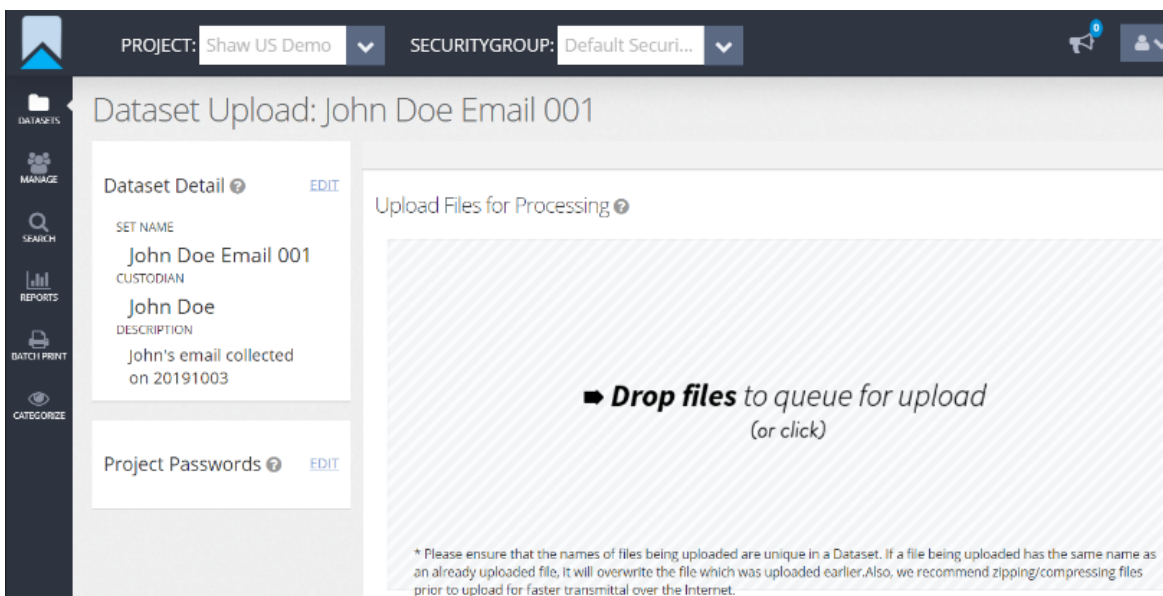
You can monitor the progress of the upload by looking at the green status bar.

Please note, you **_must_** stay on this page while the data is uploading. If you navigate to another page or close your browser, you will drop the connection and the upload will fail.

Project Passwords

If you have encrypted the zip file you uploaded, you will need to add that password to the list of Project Passwords. This is for passwords applied to the top-level container only. From the option in the left-hand side click the "Edit" link next to the heading for the Project Passwords. This will open the Project passwords window and allow you to enter a single password per line.
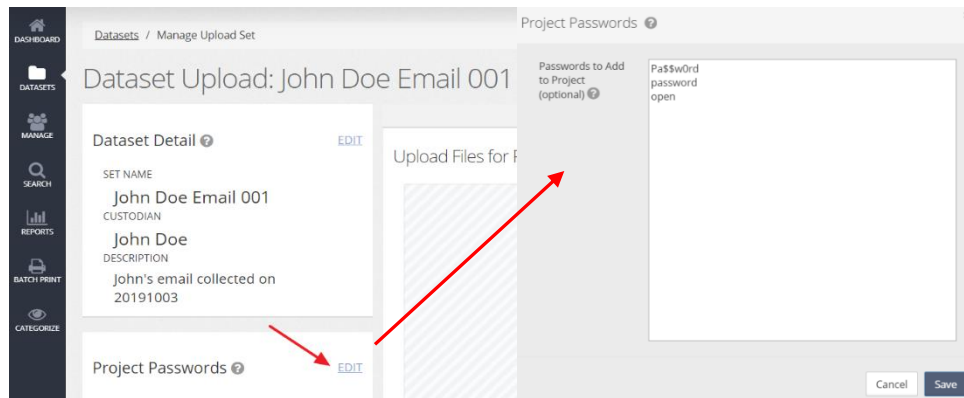
Once the passwords have been entered, click, "Save" to save the list. These passwords will be applied to all datasets within the project. You do not need to enter the passwords for each Dataset.
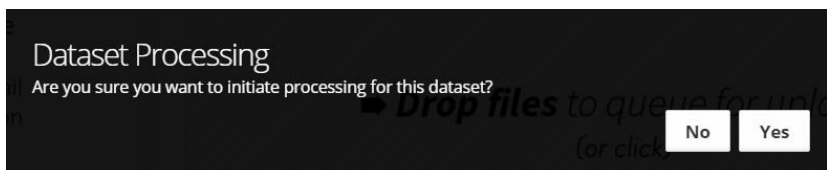
Processing Data

Once you have uploaded the data you wish to process for the Dataset into that Dataset you can click the, "Files Uploaded, Initiate Processing" button. This will do two things; lock the dataset to allow no additional changes to be made – updating name,

Custodian, description or adding additional files – and begin the processing of this data for review. You will receive a message asking if you are sure you wish to start processing since this action will lock the dataset.

Once the processing has been initiated you can navigate away from the page and/or close your browser. If desired, you can remain on the page and watch the live updates on the process by watching the Processing Engine Workload. The blue bars will move, and the numbers will populate as the data runs through the processing engine.
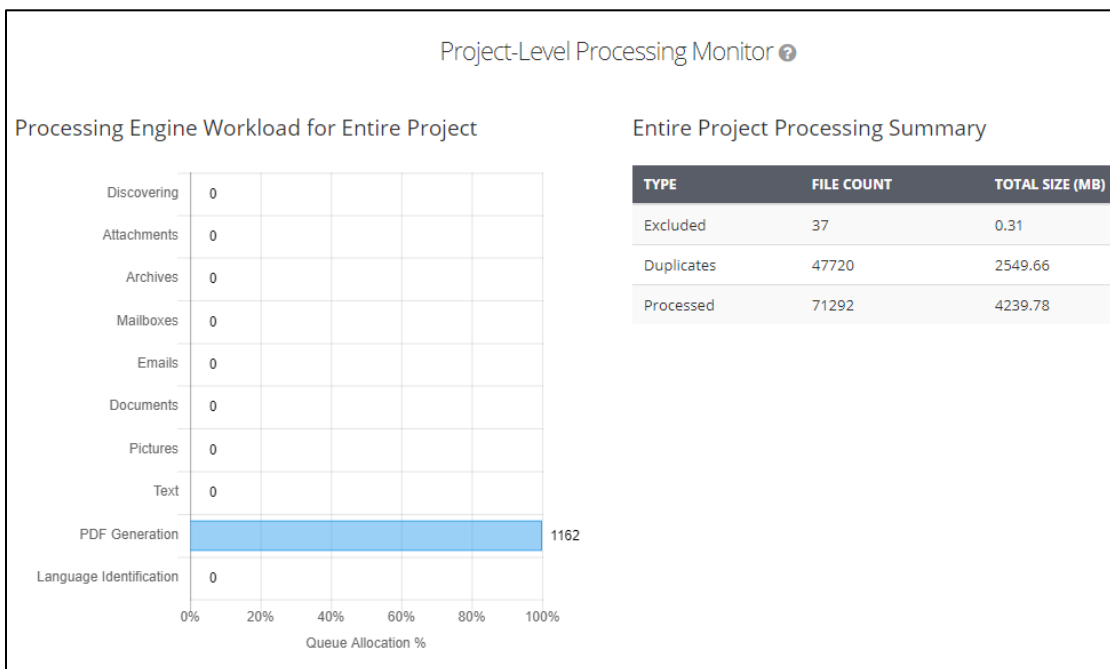
Processing Complete

After the data has gone through the various stages of processing and is completed and published into Sightline, you will see a processing summary report. The report will show the following information:

- Number of Docs Brought into Sightline
- Native Volume Brought into Sightline
- Excluded Files & Documents
- Included Docs with Errors
- The Data History by Stage
- The Data History by Number of Docs and File Size
- The Published Files by Document File Type

Error Remediation

Once the data has been processed, you can review your document errors by clicking on the red numbers in the Excluded and Included error tiles. This will open the Errors & Exceptions page. From here you can review the documents that were excluded (not brought into Sightline) and documents that were included (brought into Sightline) but had some error associated with it.

Excluded Files and Documents

The first tab on the Errors & Exceptions Page are the Excluded Files & Documents. These are files that were excluded from processing and, therefore, not included in the database. While many of these will be excluded system files, occasionally you may see data that has been excluded due to corruption, encryption or other reasons that you had intended to review. For this reason, it is our recommendation to carefully examine this tab to see if any reviewable data was excluded. Based on the exclusion, you can go back to your original data, resolve or recollect the data and process again in a new Dataset.

EXCLUDED FILES & DOCUMENTS	INCLUDED DOCS WITH ERRORS	

EXCLUDED FILES & DOCUMENTS

⬇ Export List

☐	FILE NAME ⇕	EXCLUSION REASON ⇕
☐	_1084435352	Excluded

Showing 1 to 1 of 1 entries

Included Docs with Errors

The second tab on the Errors & Exceptions Page are the Included Docs with Errors. These are files that were processed and published into Sightline but do contain an error that may make them unsearchable, unreadable, or otherwise errored. Since these files have been loaded into Sightline, you can easily review them and make your determination. The most common included errors are Native Review Required, PDF Rendering Failed, Invalid Date Format, Corrupt and Encrypted.

EXCLUDED FILES & DOCUMENTS	INCLUDED DOCS WITH ERRORS

INCLUDED DOCS WITH ERRORS

Action ▼

☐	ERROR ⇕	FILE / RECORD COUNT ⇕
☐	Corrupted	7
☐	Invalid Date Format	2
☐	Native Review Required	44
☐	Pdf Rendering Failed	42

Showing 1 to 4 of 4 entries

Reviewing Documents

After you have reviewed your errors you are now ready to begin your review of the documents. From the Dataset Processing Summary, you can click on the Action dropdown by the Published Files by File Type section. This will allow you to view the files in that Dataset in the Doc Viewer, the Doc List or open the Dataset in the Tally Report to cull the data using the tally feature on the metadata fields.
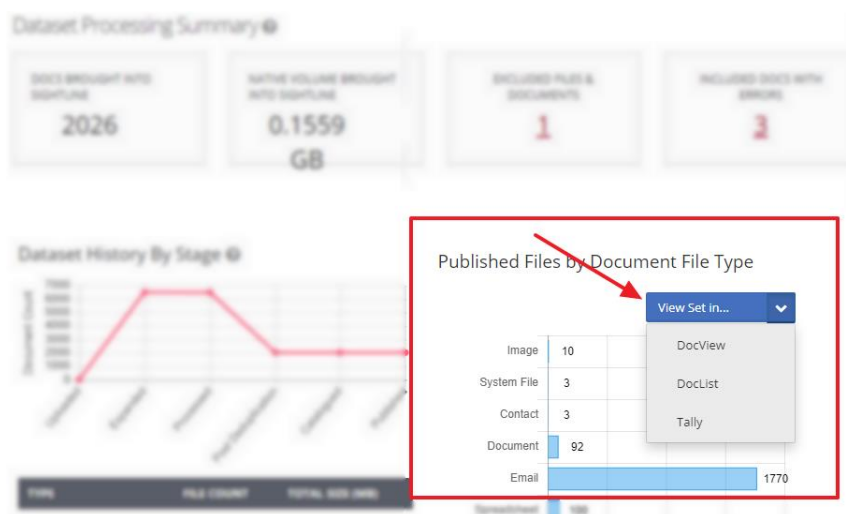

If you wish to immediately begin your review, you can open the Dataset in the DocView which will open the files in the Document Viewer and allow you start reviewing and tagging documents immediately.

Alternatively, if you wish to perform some searching or culling of the data prior to review, there are several tools you can use:

- **Document Explorer** – The Doc Explorer is a single place where Users 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. For more information, please reference the Document Explorer Help Document or Self-Help Video
- **Search** – You can use the Session Search Page to run searches against the text and/or metadata of the documents. For more information, please reference one of the several help documents on Search or the Self-Help Video.
- **Reporting** – The Reporting Page provides several data exploration reports that the User can use to cull the data. These reports include:
  - **Communications Explorer** – A visual representation of the lines of communication
  - **Concept Explorer** – A visual representation of key concepts derived from the data
  - **Tally Report** – Tally and Sub-Tally on the metadata fields extracted from the data
  - **Timeline and Gaps Report** – View a timeline and look for any gaps or data outside the desired time frame

Document Viewer

When you open the documents in the DocView, you will see the Coding Form on the right-hand side. The document, itself, appears in the main window. The left side contains the Analytics panel and the Mini Doc List.
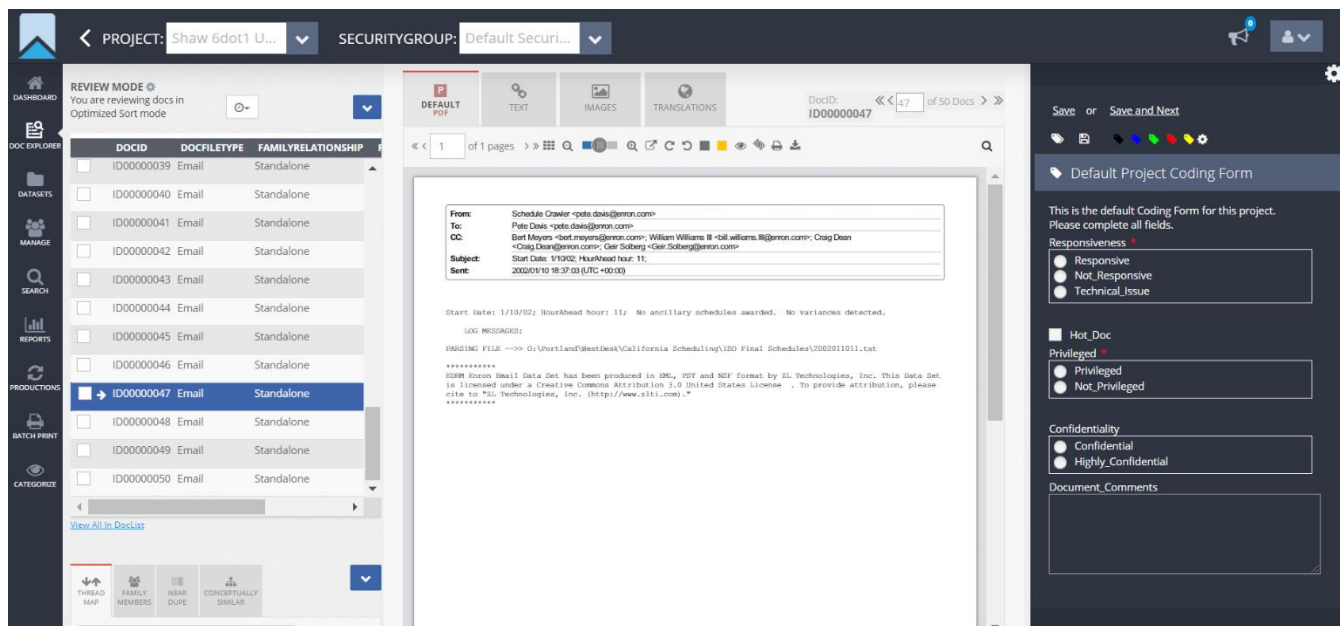
Analytics Panel

The Analytics Panel contains the Thread Map, the Family Documents, the Near Dupe and Conceptually Similar documents. Each tab can be clicked on to open that piece of analytical information.

Mini Doc List

The Mini Doc List is a list of the documents in your Dataset.

Coding Form

The Coding Form you see is the Consilio Default Coding Form. This form requires a selection of Responsiveness and Privilege (denoted by the red asterisk). If you select Technical_Issue from the Responsiveness category you will also be required to indicate the type of Technical_Issue from the coding selections that appear and enter a comment into the Document_Comment box. Selecting Privileged also requires you to select the Privilege Type from the coding selections that appear.

Once you have completed the coding of your document, click the "Save" or "Save and Next" link at the top of the Coding Form. This will save your coding to the document or will save and advance to the next document.