

DOMAIN SETUP

Sightline Legal Hold Help Documentation



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Domain Setup

Only authorized Users in Sightline Legal Hold have access to the Domain Setup menu. The Domain Setup allows these authorized Users the ability to create and manage Data Sources for in-place preservation, update the Name and Email address from which all Communication is sent, manage automated syncing of Employee data via SFTP, set user Permissions, manage Case Access, and create and manage custom Fields. Since this area is restricted, anyone requiring changes or updates to the below need to contact an authorized party and make the request.

Preservation

When creating and managing Preservation Holds within a Case, a Data Source is needed to create the connection between Sightline Legal Hold and Microsoft Purview. From the Data Sources tab on the Domain Setup, click Add New Data Source to add a new Data Source, or click the edit icon under the Action column to edit an existing Data Source. The Data Source table will show the Name, Description, URL, Connection Status, Last Update, and the Action column.

Domain Setup ?

Preservation | Email | Employee Data | Permissions | Case Access | Fields

Preservation ?

[Add New Data Source](#)

DATA SOURCE NAME	DESCRIPTION	DATA SOURCE URL	CONNECTION STATUS	LAST UPDATED	ACTION
Empty Source (No Credentials)		https://login.microsoftonline.com	Disabled	2023/03/07 06:21 PM	✎
Test Credentials		https://login.microsoftonline.com	Disabled	2023/03/09 10:54 AM	✎

Add New Data Source

Edit Preservation ?

Data Source Name *

Description

Data Source URL (Purview URL/Account Name) *

Secure Connection *

When the Add New Data Source button is selected, the Edit Preservation Page is viewable. From here, provide a Name, an optional Description, and the Purview URL or Account Name. Next, click the Configure button next to Secure Connection to open the Secure Connection window.

Secure Connection ✕

[*] Required

Tenant ID *

Application ID *

User Name *

Password *

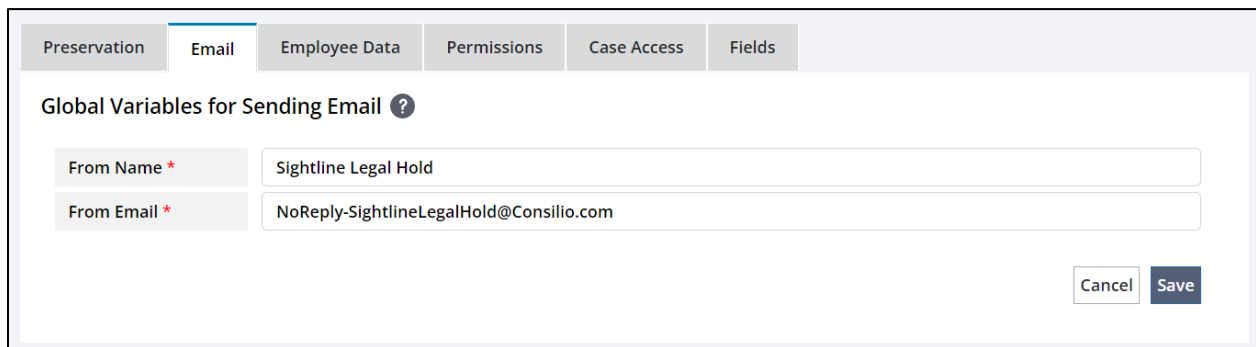
Client Secret *

The local Microsoft Purview administrator is responsible for setting up the required information on their admin dashboard. Please refer to the Sightline Legal Hold Data Source Technical Setup document for additional information. Authorized users will update the information in the Secure Connection window. All information will be generated by Microsoft Purview when setting up the Sightline Application and will simply need to be copied into the respective text boxes.

Once completed, click the Test Connection button to test the connection and ensure that Sightline can communicate with Microsoft Purview. If successful, click Save and Done.

Email

The Email tab under Domain Setup will set the From Name and Email for all Communication sent through Sightline Legal Hold. The Email Address should be an email or distro created on the client's instance of Microsoft Outlook. The Name can be whatever the client requests.

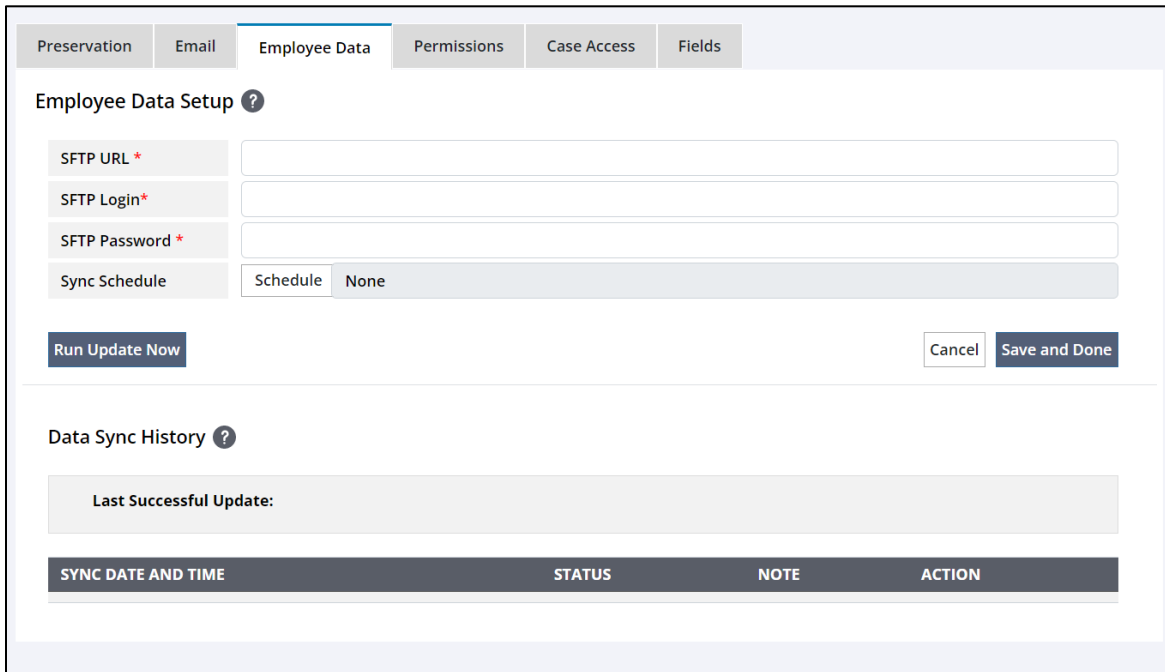
A screenshot of a web application interface showing the 'Email' configuration tab. The interface has a top navigation bar with tabs for 'Preservation', 'Email', 'Employee Data', 'Permissions', 'Case Access', and 'Fields'. The 'Email' tab is selected. Below the navigation bar, the section is titled 'Global Variables for Sending Email' with a help icon. There are two input fields: 'From Name *' with the value 'Sightline Legal Hold' and 'From Email *' with the value 'NoReply-SightlineLegalHold@Consilio.com'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Employee Data

In addition to managing Employee Data from the Employees Page the client can optionally choose to sync the Employee Data through an SFTP location. The client should setup an SFTP on their network with a Username and Password that can be shared with Sightline Legal Hold. The SFTP location should contain two folders at the root: "Employee" and "Processed". Once the SFTP is established, the credentials can be entered into the Employee Data tab of the Domain Setup Page.

Optionally, a Sync Schedule can be established where Sightline Legal Hold will check the "Employee" folder in the SFTP on a designated schedule and look for an updated file. If an updated file exists, Sightline Legal Hold will download the file and use it to update the Employee Data. Sightline Legal Hold will then move the file from, "Employee" to "Processed".

Once the SFTP is established, the client should download a copy of the CSV template file used to upload Employee Data from the Employees Page. The Headers in the template should be the headers used on the file uploaded to the SFTP. The client will export the Employee data from their local HR systems, ensuring that the fields exported match the headers from the Sightline Legal Hold template. The file should be the only file uploaded to the “Employee” folder of the established SFTP.



Employee Data Setup ?

SFTP URL *

SFTP Login*

SFTP Password *

Sync Schedule Schedule None

Run Update Now Cancel **Save and Done**

Data Sync History ?

Last Successful Update:

SYNC DATE AND TIME	STATUS	NOTE	ACTION
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Once the file has been uploaded, click the Run Update Now button to run the first Employee Data Sync. Sightline Legal Hold will use the uploaded file to update the Employees Page and then move the file to a different folder. If a schedule has been established, Sightline Legal Hold will check the SFTP on that scheduled time and look for a CSV file with a later last modified date. If there is no new file, the system will do nothing until the next scheduled time. If an updated file is found, the system will use the new file to update the Employee Data and then move that file to the, “Processed” folder. The Data Sync History table will display the historical information on the previous Data Syncs.

Sightline Legal Hold will run validations on the file before it is uploaded. If the CSV is missing an expected header, or column, the User will get an error message and the file will not be uploaded. Additionally, Sightline Legal Hold will run validation on the entered values to ensure they meet the criteria of the field in the system, e.g., if the field is a short text, and the entered value is longer than 200 characters, and error will be displayed. This step will also check for proper date and email formats for those types of fields.

Permissions

The Permissions tab is used to manage the permissions within Sightline Legal Hold for the users who have access. The Permissions table shows the Username, Email Address, Application Access, and Status. The Action column contains the edit icon to manage the selected user's permissions. Clicking on the edit icon will open the Edit User Permissions page. From this page, use the checkboxes to enable or disable the listed permissions.

List of Permissions

Below is the list of each permission with a description. The default permissions for a User are Create Case and Close Case.

- Delete/Remove – User can remove Custodians from Cases and take Delete Actions including:
 - Employees
 - Cases
 - Preservations
 - Communications
 - Attachments
 - Templates
- Create Case – User can create Cases
- Close Case – User can close Cases
- Manual Acknowledgment – User can manually acknowledge or do so on behalf of a Custodian
- Preservation – Controls whether the User will be able to access, edit, or view the Preservations section within Cases

Edit User Permissions

User Name: Mike [redacted]

Email: mike[redacted]@gmail.com

Legal Hold Application Permissions

SELECT	PERMISSIONS
<input type="checkbox"/>	Delete/Remove Action
<input checked="" type="checkbox"/>	Create Case
<input checked="" type="checkbox"/>	Close Case
<input type="checkbox"/>	Manual Acknowledgment
<input type="checkbox"/>	Preservation

Case Access

CASE NAME	CASE OWNER	ACCESS USER LIST	CASE STATUS	SYSTEM CREATE DATE	ACTION
Search Case Name	Search Case Owner	Search Access User List	All	Search System Cre	
Arbitration 101-Family Foundation	Madelynn D'Amico	Mathew Dzialowski, Madelynn D'Amico, Susan Berni, Bernie Hwang, Rob Brown, Daniel Brown, Ben Demohead, Adam Kozicki, Amanda Rodwin	Closed	2023/03/13 10:56 AM	
BAC LH1.0	Ben Demohead	Mathew Dzialowski, Madelynn D'Amico, Susan Berni, Bernie Hwang, Rob Brown, Daniel Brown, Ben Demohead	Active	2023/03/10 11:37 AM	
BW Case	Mathew Dzialowski	Mathew Dzialowski, Madelynn D'Amico, Susan Berni, Bernie Hwang, Rob Brown, Daniel Brown, Ben Demohead, Adam Kozicki, Amanda Rodwin, Omid Jafarizadeh, Mike Brown, Carolyn Young	Active	2023/03/16 05:27 PM	
CSY - LIAT CASE	Mike Brown	Mathew Dzialowski, Madelynn D'Amico, Susan Berni, Rob Brown, Omid Jafarizadeh, Mike Brown	Active	2023/03/15 09:13 AM	

The Case Access tab controls which users have access to which Cases. The table on the Case Access page can be searched and sorted using the headers. The full or filtered table can be downloaded using the download icon. To add, remove, or reorder column headers, click the gear, and make the updates from the popup window. The Action column here can be used to manage user access.

Click the edit icon in the Action column to open the Case Access for the selected Case. This page will display a list of all users and their email addresses. The first column is the Access Permission column and controls access through the checkboxes. Checked will grant access, unchecked removes access.

Edit Case Access

Case Name: Arbitration 101-Family Foundation

Owner:

User(s) for Case Access

ACCESS PERMISSION	USER NAME	EMAIL ADDRESS
<input checked="" type="checkbox"/>	Mathew Dzialowski	dzi.dzialowski@gmail.com
<input type="checkbox"/>	Susan Berni	susan.berni@consilio.com
<input checked="" type="checkbox"/>	Bernie Hwang	bernie.hwang@consilio.com

Custom Fields

While Sightline Legal Hold provides a multitude of Case and Employee specific fields for tracking relevant information, there may be times when there is a specific field that does not fit into one of the provided fields. In these situations, additional custom fields can be created and added to Cases and Employees. Once added, these fields will be available from the Case and Employee pages. Custom Case Fields are created at the Domain level, so any Case created within the Domain will have access to all the Custom Fields created for any of the Cases.

The Fields Page is divided into two sections: Custom Case Fields and Custom Employee Fields. Both tables include the Display Order, Field Name, and Value Type. The Action column allows for the deletion of the field and all associated information entered into that field.

Preservation
Email
Employee Data
Permissions
Case Access
Fields

Custom Case Fields Add New Field

DISPLAY ORDER	FIELD NAME	VALUE TYPE	ACTIONS
1 ▼	ABC-Case Custome Field *	Short Text (200 Char) ▼	
2 ▼	Custom Case 2 *	Short Text (200 Char) ▼	
3 ▼	Custom Case 3 *	Short Text (200 Char) ▼	
4 ▼	ARB 101 Field *	Short Text (200 Char) ▼	
5 ▼	GMS Case Field *	Short Text (200 Char) ▼	
6 ▼	UAT-Relevant Data *	Short Text (200 Char) ▼	

Custom Employee Fields Add New Field

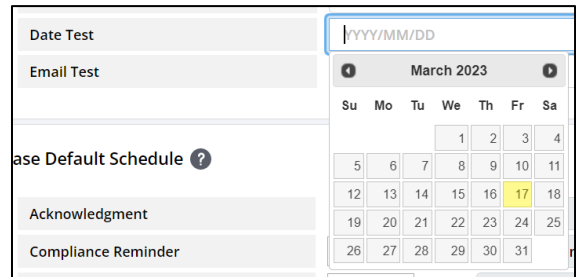
DISPLAY ORDER	FIELD NAME	VALUE TYPE	ACTIONS
1 ▼	Formerly Known As *	Short Text (200 Char) ▼	
2 ▼	Custom Employee 2 *	Short Text (200 Char) ▼	

To add a custom field, click the Add New Field button in the section for which you wish to create a new field. This will add a line to the end of the respective table to which the Display Order, Name, and Value Type can be set.

DISPLAY ORDER	FIELD NAME	VALUE TYPE	ACTIONS
7		<div style="border: 1px solid #ccc; padding: 2px;"> Short Text (200 Char) <ul style="list-style-type: none"> <li style="background-color: #007bff; color: white; padding: 2px;">Short Text (200 Char) <li style="padding: 2px;">Long Text (4000 Char) <li style="padding: 2px;">Date <li style="padding: 2px;">Email </div>	

Use the Display Order to order the fields within the Cases and Employee pages. The name should be short, but descriptive, so it is easy to reference by other users. The Value Type can be one of four options: Short Text, Long Text, Date, or Email.

- Short Text is for text values under 200 characters.
- Long Text is for text values between 200 and 4,000 characters.
- Date is a date field in YYYY/MM/DD format and will display the popup calendar for date entry (screen shot at right).
- Email will allow for text entry, but Sightline Legal Hold will ensure it is a valid email format (screen shot below).



Email Test	<input style="border: 1px solid #ccc; width: 100%;" type="text" value="steve"/> <p style="color: red; font-size: small; margin-top: 5px;">Invalid email address format, this field must have a valid email address</p>
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Once the information has been entered, click Save to save the newly created Field.