MANAGE EMPLOYEES PAGE

Sightline Legal Hold Help Documentation

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Manage Employees

Managing Employees provides for the capability to maintain updated employee information and the ability to associate employees to a Case, and designate employees as custodians within the case. Once the Employees have been populated in Sightline Legal Hold, an automated process can be implemented to refresh employee related information on a scheduled basis.

Employees may also be added individually on an as needed basis, or in bulk using a templated upload document, or via FTP.

Manage Employees Page

To access the Manage Employees Page, click the Employees menu icon on the left-hand side of the screen. The menu will be accessible from anywhere in the tool.
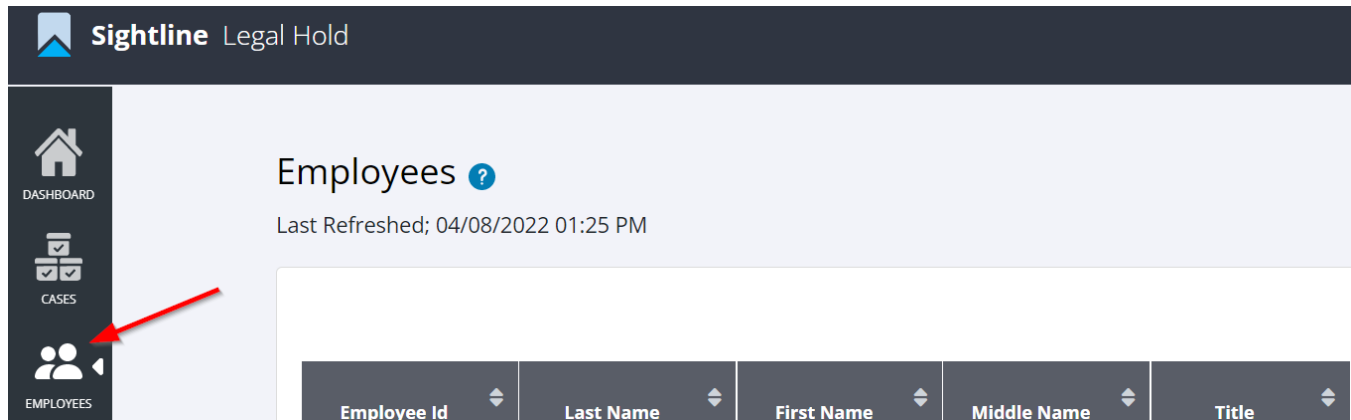
The Employees Page contains the list of Employees added to Sightline Legal Hold and available to add to cases. The information is displayed in a table format where the headers are the various pieces of information that can be populated for each Employee.

Adding Employees

There are two ways to enter Employees: Manually and Uploading a CSV. To add an Employee manually, click the arrow next to Manage Employees and select, "Add Employee Manually (Figure 1). This will open the Add New Employee window (Figure 2).
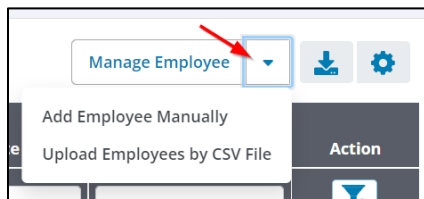

FIGURE 2

FIGURE 1

From this window you can enter in the information for the Employee. Please note that any field with an asterisk is required. Any Custom Employee Fields that were created will also be visible from this window. Once the information is entered, click Submit & Close to save the Employee.

Employee Fields

Employee Id *	Title
GUID	Department
First Name *	Location
Middle Name	Hire Date
Last Name *	Termination Date
Also Known As	Employment Status
Email *	Manager Name

You may also use the Upload Employee List option. This option allows for the upload of multiple employees at once using a CSV template. To use this feature, select Upload Employees by CSV File from the Manage Employees button (Figure 1). This will open the Upload Employees List window (Figure 3).
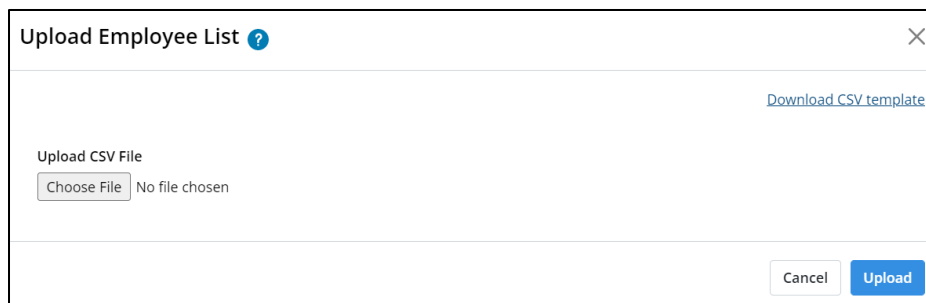

FIGURE 4

To download a copy of the CSV Template, click the link for Download CSV Template on the right-hand side of the window. Save the template to your local machine. Once downloaded, open the file using Excel and enter the information for each Employee on a single line. The headers in the CSV provide guidance (Figure 5). The same fields that are required manually, are required when using the template.
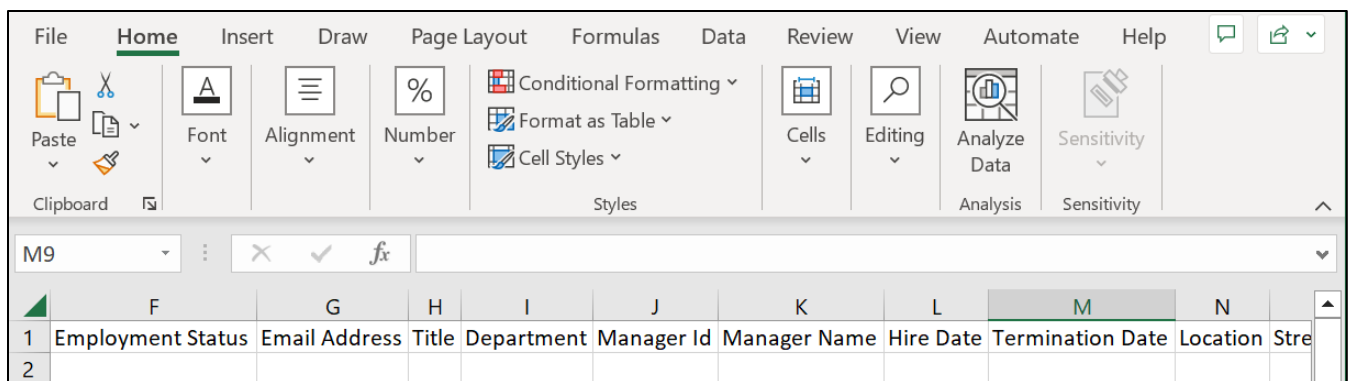

FIGURE 5

Once the template has been filled out with all the Employees to add, log back into Sightline Legal Hold, go to the Manage Employees Page, select the Upload Employees by CSV File option, and now click the Choose File button under the Upload CSV File header (Figure 4). Locate the saved file on your local machine and select it.

The Name of the file should now appear next to the Choose File button (Figure 6). Click the Upload button in the bottom right to load the file. Sightline Legal Hold will take the file and create an entry for each Employee on the template with the information entered for each field.

FIGURE 6

Editing and Deleting Employees

Once Employees have been added to Sightline Litigation Hold, you can edit or delete (with permissions) the Employee record. The last column of the Employee table is the Action column. This column contains two buttons for each Employee - a pencil (Edit) and a trashcan (Delete). Clicking the Edit button will open the Edit Employee window, which contains the same information as the Add New Employee window. You can make edits to the information and then click **Submit & Close** to save the edits and go back to the table view. Clicking the **Delete** button will remove that Employee from the system. You will get a confirmation window asking if you are sure you want to delete the Employee.

Sorting and Searching Employees

The headers can be sorted by clicking on the header name. Each click will cycle that columns sort in ascending and descending order. The header columns can also be searched by typing into the text box below the header name. As you type in the box, the information below will filter. You do not need to enter full words, e.g., typing, "oh" will pull John, Ohio, Doh, etc. Deleting text from the box will remove the search filter. You can also remove all sorting and filtering options by clicking the button under the Action column (Figure 7).
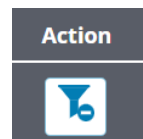

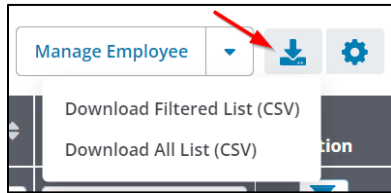FIGURE 7

Downloading the Employee List

FIGURE 8

If you need to download the list of Employees, you can do so by clicking the Download button on the top right of the Employee table view. Clicking this button will show two options: Download Filtered List (CSV) and Download All List (CSV) (Figure 8). If you had filtered the list using the search box under the headers, you can download the filtered list by selecting the first option. The second option will download the full Employee list in a CSV format.

Customizing the Table View

The table view can be customized to add or remove fields from the headers. To customize the table, click the gear icon in the upper right to open the Table Column Setup window (Figure 9).
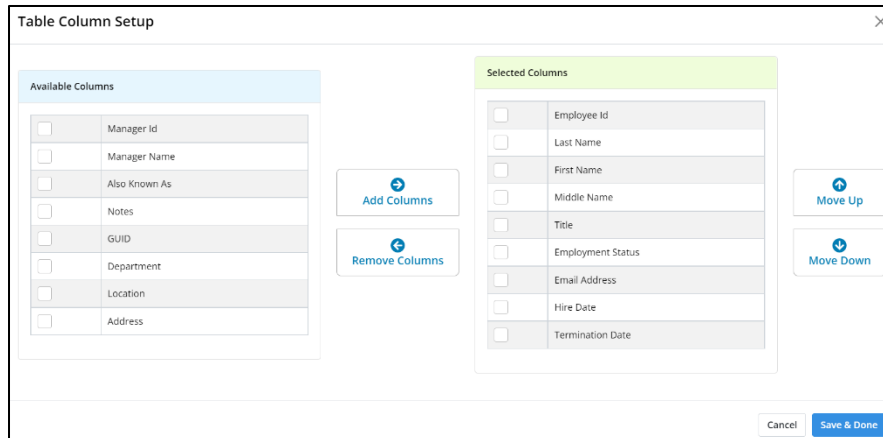

FIGURE 9

The window consists of 2 field lists: Available Columns and Selected Columns. Selected Columns are the fields that currently are listed in the headers of the Table. The Available Columns are the other headers available to add to the table view. Between the two lists are two buttons to Add Columns or Remove Columns.

To add columns, select the fields you wish to add from the list of available fields and click the Add Columns button. To remove columns, select the fields you wish to remove from the list of Selected Columns and click the Remove Columns button. Once you have updated the Select Columns list, you can sort the fields by clicking on a field and then using the Move Up and Move Down buttons. The fields are arranged in the table where the top fields are on the left and the bottom fields on the right. When the fields and sort are customized, click the Save & Close button to save the customization and go back to the table view.