TEMPLATES, REPORTS, AND AUDITS

Sightline Legal Hold Help Documentation

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Templates, Reports, and Audits

Sightline Legal Hold offers the ability to template most features when creating a Legal Hold to make future Legal Holds easier and quicker to setup and manage. Each of these Templates can be managed from within the original setup, as described in the other documentation, or from the Templates Page. Sightline Legal Hold also provides in-depth reports that can be scheduled and sent automatically, and a full audit history of Communications and actions.
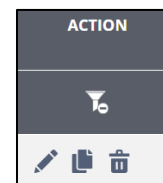
Templates

When creating a Legal Hold, the use of Templates can make the process easier and quicker to set-up and manage. As discussed in the other Sightline Legal Hold help documents, Templates can be created as each object is being created for the first time, e.g., when creating a new Case, the Case can be saved as a Template when it is being created. Each Template in Sightline Legal Hold is available for editing, duplication, or deletion from the Templates Page.
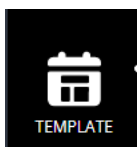
The Templates Page is accessed from the left-hand side menu using the Templates icon. Click the menu icon to open the Templates page. Here the familiar table layout is available that shows the Template Name, the Template Type, who created the Template, the Dat it was created, the date it was Last Updated, and a list of any Attachments. The last column is the Action Column from which the Template can be Edited, Duplicated, or Deleted by clicking on the appropriate icon. Using the gear on the top right, the columns can be added, removed, or rearranged.

In addition to creating Templates from objects when they are being created, Templates can be created from the Templates page. To do so, click the **Add Template** button at the top right of the table. This will open the Create Template pop-up window. From here, enter the Template Name and the Template Type (Case, Survey, Acknowledgement, Compliance Reminder, Escalation, Schedule Reminder, Notice, Release)
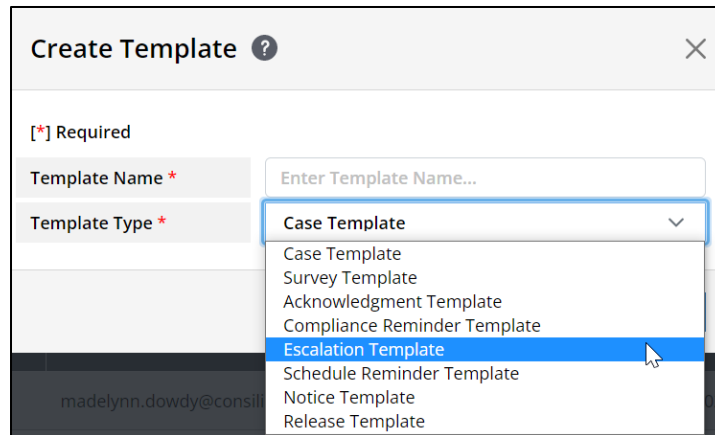

Clicking any of the options will navigate to that object's creation page where it can be set up and saved as a Template.

Reports

Sightline Legal Hold provides six regular reports that can be generated, and emailed, automatically on a designated schedule. In addition to the standard reports, Sightline Legal Hold offers the ability to pull any available field into a custom report.

The standard reports can be downloaded on-demand from the Reports page by clicking on the download icon next to the desired report. Additionally, each standard report can be setup to be delivered to users via email on a schedule. To set a report to send on a schedule, click the Edit icon under the Action column next to the Report to manage. This will open the Edit Reports page.
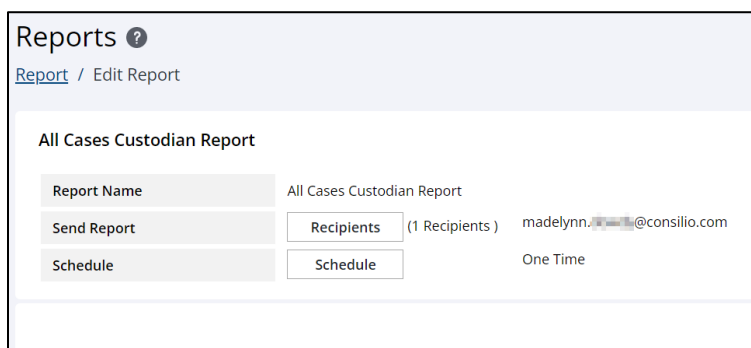
This page will show the current Recipients and Schedule. To update the Recipients, click the Recipients button and select the users who should receive the report. To update the schedule, click the Schedule button and select the frequency and day options. Once done, click **Submit** on this window and **Save & Done** on the Page.

Standard Reports

All Cases Custodian Report – A report showing all Custodians across all Cases within the instance of Sightline Legal Hold and including all fields associated with the Custodians and Cases.

Active Cases Custodian Report – A report showing all Custodians across all active Cases within the instance of Sightline Legal Hold and including all fields associated with the Custodians and Cases.

All Employee Change Monitor Report – A reporting showing any change made to an Employee's fielded information including the field that was updated, the old value and the new value.

Active Employee Change Monitor Report – A reporting showing any change made to an Active Employee's fielded information including the field that was updated, the old value and the new value.

Non-Compliant Custodian Report – A report showing any Custodian who is non-compliant to any request across all Cases.

Preservation Hold Report – A report of all Preservation Holds with name of the Custodian and the Start Date of the Preservation.

Custom Report

The Custom Report is a selection of fields from Sightline Legal Hold exported out into a spreadsheet. Use the gear to select the columns and order desired just like adjusting the table view in any other section of the tool. Once the fields and order have been confirmed, click Save & Done on the pop-up and then use the download button on the top right of the Custom Report table to download the information into a spreadsheet. Custom Reports cannot be scheduled.

Mailbox

The Mailbox is the collection of all Communications sent out through Sightline Legal Hold. Each message is tracked in the Mailbox for auditing purposes. Just above the Table, is a Date filter. Users can filter the messages in the table view by date range. Using the Date Range dropdown, a series of set date ranges can be selected, or select Custom to enter a custom date range.
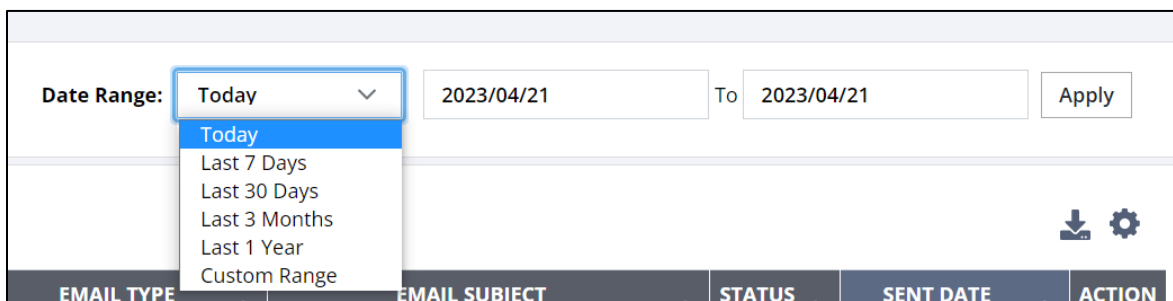
The fields in the table can be adjusted using the gear icon. Fields can be added or removed and ordered using the Table Column Setup. Once the fields are set, click Save & Done to go back to the table view.

The headers in the table view 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. Under the Action column, the User can elect to resend the message.

Audit Trail

The Audit Trail is a full history of every action taken in Sightline Legal Hold. The header at the top will let the user know when the list has last been refreshed. The list can be filtered by Date Range using the Date Range option on the upper right. Use the dropdown to select Today, Last 7 Days, Last 30 Days, Last 3 months, Last 1 Year, or select a Custom Range and fill in the date range using the boxes and clicking **Apply**.

The table 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.