GETTING STARTED

Sightline Legal Hold Help Documentation

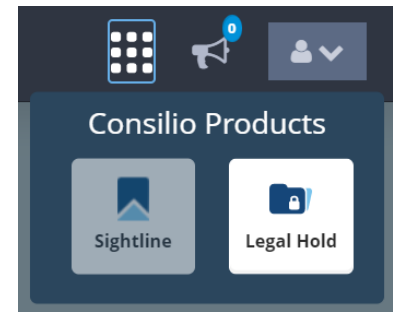**Consilio**®

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Sightline Legal Hold

Sightline Legal Hold is a new module within Sightline that allows Clients to manage their legal hold needs. The primary processes of a legal hold are notification of Custodians of legal hold obligations and tracking that notice, and preservation of data. Sightline Legal Hold supports both. Before using Sightline Legal Hold, it must first be set up at the Client level by a Consilio Administrator. Then, individual Users can be granted access to Sightline Legal Hold for that Domain in the Functionality tab of the Edit User menu.
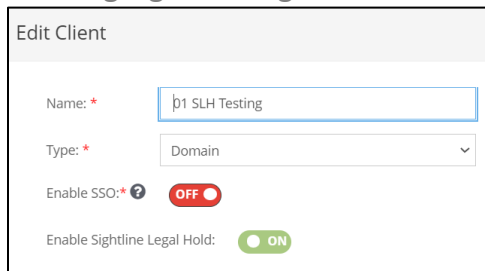
Once set up, Users will be able to access Sightline Legal Hold by logging in through Sightline and accessing Sightline Legal Hold from the application launcher in the upper right of the Domain Dashboard. Users will be brought to the Cases page with the Dashboard displaying aggregate statistics of their legal hold process, and their legal hold Cases List. In Sightline Legal Hold the User can navigate to any of the main pages by using the left side navigation bar, similar to the Sightline application.

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Sightline Legal Hold is a separate tool accessible through Sightline. Only Domain Administrators can access Sightline Legal Hold through a menu available on the Domain Dashboard Page. The menu is located on the top right of the page, next to the Bullhorn. Clicking the app launcher (nine squares) will display the Consilio Products menu from which authorized Users can select Sightline or Legal Hold.
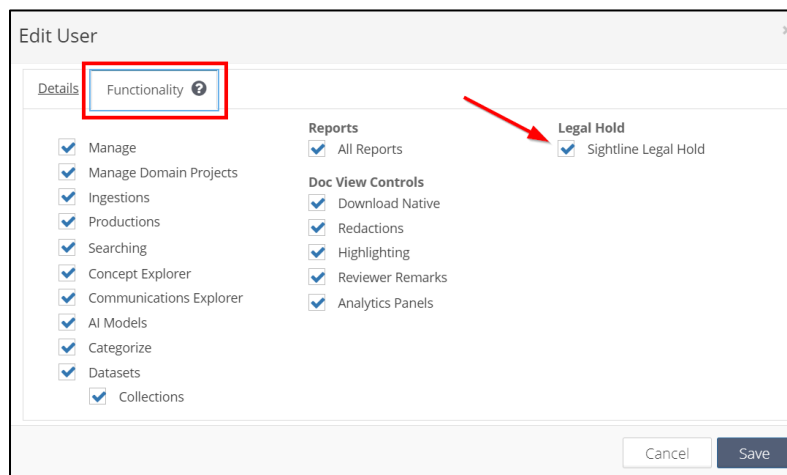
Enabling Sightline Legal Hold for the Client

To enable Sightline Legal Hold, Consilio Administrators will need to change the toggle from the Manage Client section. Search for the Client for which Sightline Legal Hold should be enabled and click the Edit button for that Client. From the Edit Client pop-up, toggle the Enable Sightline Legal Hold on.

Enabling Sightline Legal Hold for Users

Once enabled, access to Sightline Legal Hold can be further granted on the Domain Admin User level through the Manage Users section of the Domain Dashboard and enabling Sightline Legal Hold from the Functionality tab of the Edit User window. As a Domain Administrator, click on Manage -> Users, locate the User for which Sightline Legal Hold access should be granted, and click the Edit button.

This will open the Edit User pop-up window. Click on the Functionality tab and click the checkbox next to Sightline Legal Hold under Legal Hold. This will grant access to the Consilio Products menu and Sightline Legal Hold for that User. By default, Domain Admin Users will not have access to Sightline Legal Hold. It must be turned on for any User to have access. To remove access, uncheck the box. Once proper access has been established, click Save.

Accessing Sightline Legal Hold

Once enabled at the Client and User levels, to access Sightline Legal Hold, use the Consilio Products menu and select Legal Hold. This will navigate to the Sightline Legal Hold Cases Dashboard. From here, Users can create and edit Cases, or use the Menu on the left-hand side to access the other areas of Sightline Legal Hold.