



# SIGHTLINE 10.1 RELEASE NOTES

January 2024



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## Sightline Release 10.1 Abstract

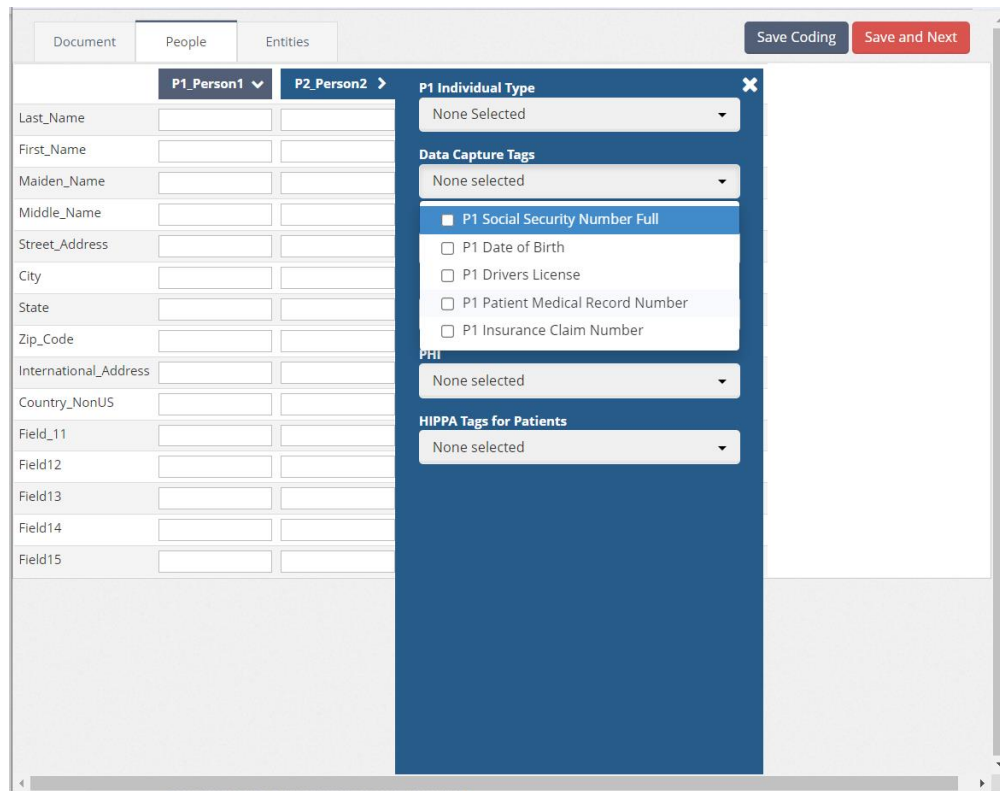
The 10.1 Release of Sightline contains enhancements to our Cyber related projects, with further updates to Coding Forms that use a table-style view to provide an easier way to add data across multiple coding forms. Sightline 10.1 also adds new Project Template functionality to allow for instance-wide Templates so that the release of these Templates can be pushed out to all Domains and Projects within a particular geographic instance. This release also includes enhancements to File Download names, a Redaction propagation toggle, links to CAL coding conflicts, and support fixes.

## Enhancements

**Update UX of the Table View Coding Form to Improve the Cyber Review Efficiency (RPMXCON-80993, RPMXCON-81037, RPMXCON-81050, RPMXCON-81169, RPMXCON-81183, RPMXCON-81300, RPMXCON-81301, RPMXCON-81302, RPMXCON-81303, RPMXCON-81304, RPMXCON-81453)**

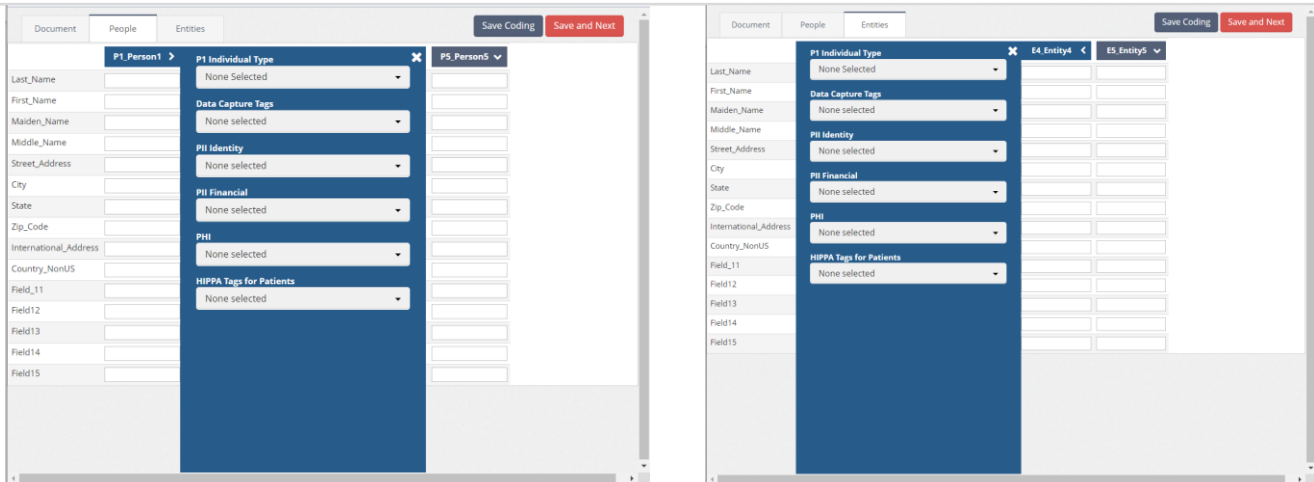
Originally released in the December 2023, 9.8 Release, the Table View functionality to support Cyber review has multiple improvements in this release. The setup and functions of the Table View not referenced here have not changed from the prior release.

Multiple improvements have been made to the Table View functionality including general improvements to labels, positioning, look, and feel:

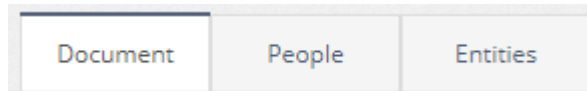
A screenshot of the Consilio software interface. The top navigation bar includes tabs for "Document", "People", and "Entities", along with "Save Coding" and "Save and Next" buttons. Below the navigation, there are dropdown menus for "P1\_Person1" and "P2\_Person2". The main area displays a table with columns for "P1\_Person1" and "P2\_Person2", and rows for various fields: Last\_Name, First\_Name, Maiden\_Name, Middle\_Name, Street\_Address, City, State, Zip\_Code, International\_Address, Country\_NonUS, Field\_11, Field12, Field13, Field14, and Field15. A blue popup menu is open on the right side, titled "P1 Individual Type". It contains a dropdown menu for "P1 Individual Type" (currently "None Selected"), a "Data Capture Tags" section with a dropdown (currently "None selected"), a checked checkbox for "P1 Social Security Number Full", and three unchecked checkboxes: "P1 Date of Birth", "P1 Drivers License", and "P1 Patient Medical Record Number". Below this is a "PHI" section with a dropdown (currently "None selected"), and a "HIPPA Tags for Patients" section with a dropdown (currently "None selected").

The following specific improvements have also been made:

1. The Table View will be turned on by default in all newly created Projects in the Cyber Domain
2. The popup menus for People and Entities will now display to the right or left to ensure the popup is not hidden



### 3. Renaming the Entity tab to **Entities**



## Consilio Project Templates (RPMXCON-72421)

Each environment (MTP, UK, Test Environments, etc.) will support the ability for one or more projects to be enabled as Consilio Template Projects to display and be selected when creating a new project from an existing template. These template projects will be configured only by designated System Admin Users, and then will be published/enabled by Support. Once a template project is enabled, it can be viewed by System Admins or Domain Admins when creating a new project.

To enable/disable a Project as an instance level template that can be used across domains:

1. User must be a designated System Admin user
2. The Project must be configured in the “Consilio Workspace Templates” Domain
3. The Project must have a database flag enabled (this must be done by L2/App Support) - Admins must submit a Service Desk ticket to request a project be enabled as a template for all Clients.

Once enabled, these Consilio Template Projects will display in the Project to Copy From dropdown and can be selected by any Client when creating a new project.

**Copy from Existing Project**

Project To Copy From:

If you choose to use an existing project as a template for project creation, the following artifacts will automatically be copied from the existing project to the newly created project.  
**Project Fields, Security Groups, Production/Export Templates, Tags, Folders, Comments, Coding Forms, Annotation Layers, Redaction Tags and Keywords.**

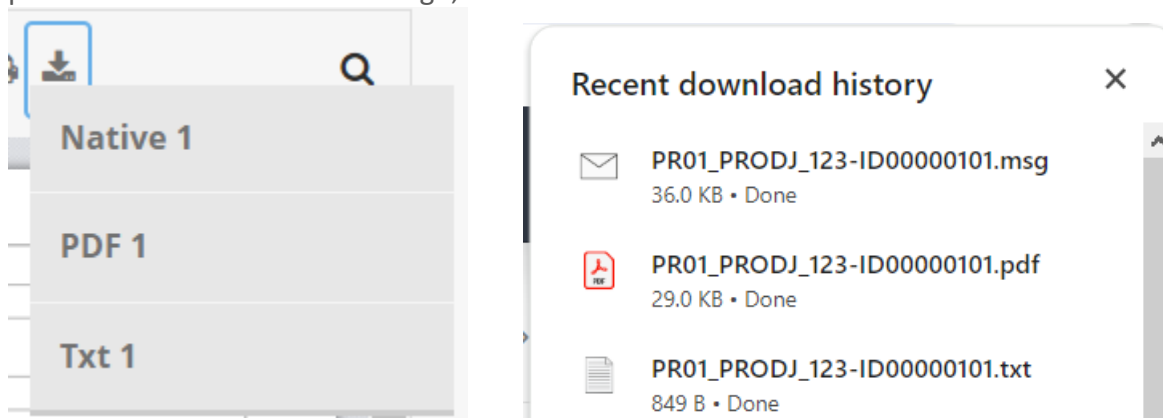
When a project is created by copying settings from an existing project, all the artifacts will be copied to the new project as they do today. And they can select to copy any users, searches, and assignments, the way they can today.

Consilio template projects will be available for Domain AND Non-Domain projects.

Note: If a project is created/flagged as a CTP then later is removed from the Consilio Workspace Templates domain, this template will no longer be available across clients/domains.

### DocView: Use HCode and DocID as the file name of the downloaded file (RPMXCON-79371)

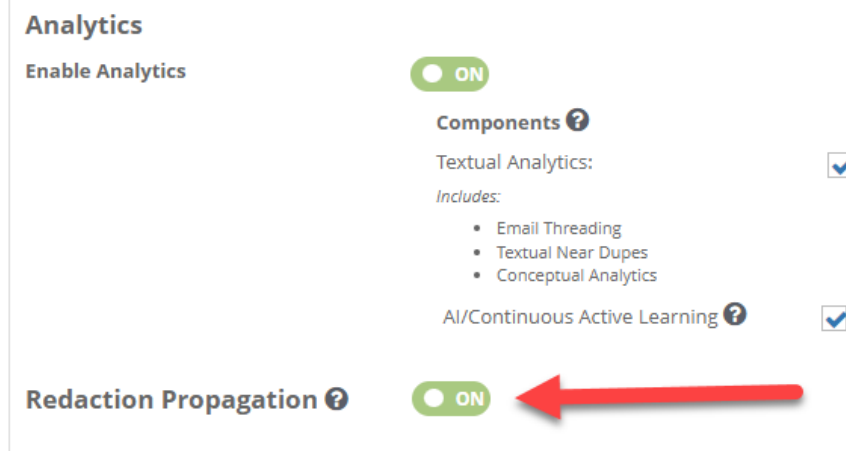
When documents are downloaded using the download button on the DocView, the file names now will include the Project Code (H-Code) and DocID. This allows easy identification of downloaded files when working in multiple projects. This applies to Native, Image, and Text file downloads. Downloads of produced versions will not change, and will continue to use the bates number as the file name.



### Project Level Redaction Propagation Options (RPMXCON-81118)

In the 10.1 release, there is a new toggle in the Project Settings to disable redaction propagation for the project. Once this setting is disabled, it cannot be turned back on. Any existing redactions that have been applied to documents will not be affected by disabling the setting, however any newly applied redactions will NOT propagate to duplicate documents.

This setting will be ON by default for all new and existing projects.








## CAL: Scoring History - Make Coding Conflicts a Link to the DocList (RPMXCON-81264)

Users can now click on the hyperlinked document number to view docs that were excluded from the training and scoring run due to coding conflicts.

## Training And Scoring History: Confidential

View History for Date : [2023/12/20 20:30:04 \(Most Recent\)](#) 

### Training Information

<b>Model name:</b>	Confidential
<b>Training type:</b> 	Automated
<b>Automation status:</b> 	Currently Running
<b>File types selected for training:</b> 	Word / Text Files (.doc, .txt, .rtf, etc.) Spreadsheets (.xls, .xlsx, .csv, etc.) Images (.jpg, .gif, .tiff, .cad, etc.) Adobe Portable Document Format (.pdf) Email (.msg, Notes, .eml, etc.) Presentation Files (.PPT, .PUB, Visio, etc.)
<b>Tagging methods selected for training:</b> 	BulkTag
<b>Number of training docs:</b> 	<b>45</b> <i>*Note: 6 doc(s) were not included for training as they have conflicting tags</i>

## Priority Production Issues

### Don't Allow Datasets to Have the Same Name as an Existing Folder or Collection (RPMXCON-80586)

**Issue:** When a new dataset was being loaded, the publish of the dataset would fail, if the name of the dataset has the same name as that of an existing folder in the project.

**Resolution:** Users will now see an error in the UI if they attempt to create a new dataset (either in Datasets or in Collections) with a name that is same as that of an existing folder. Similarly, when a user creates a new folder, it will error if the name of the folder is same as that of an existing dataset.