



User Guide

MaxMessage™

Relativity® 9.1 - 9.3

Developed by TSD Services, Ltd (www.tsdservices.com)

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1. What is MaxMessage?

In a nutshell, MaxMessage is a Relativity Ecosystem application that is designed to improve communication between Relativity administrators, project managers, and their corresponding teams.

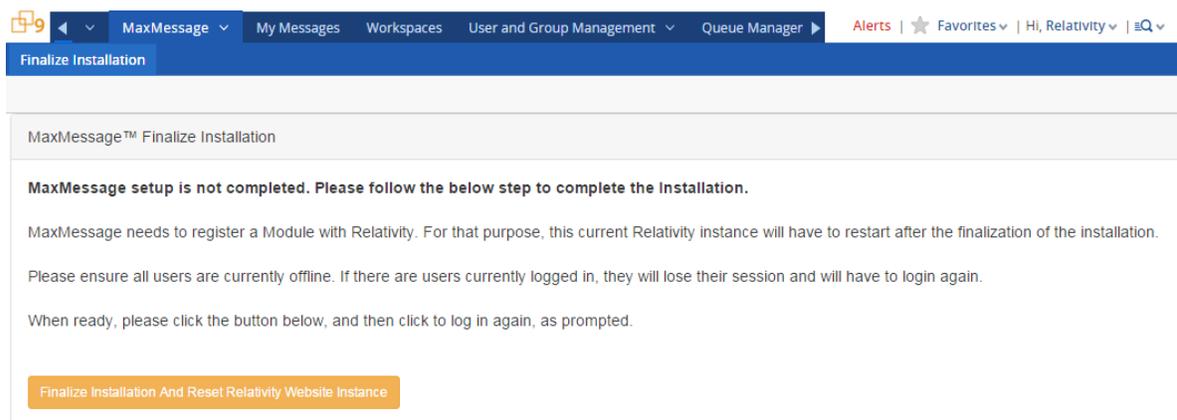
Using MaxMessage, users can send and receive messages instantly, or schedule them for a specific time, getting acknowledgment information when they arrive. Users can also add rich text and attach files for a sleeker messaging experience.

The application provides various options for composing and scheduling messages to an individual user or a group of users on a workspace or instance level.

2. Installing & Setting up MaxMessage

MaxMessage installation comes down to only a few steps for the Relativity administrators:

1. Pick a placeholder Workspace and install the provided .RAP file
2. Create one instance of the **MaxMessage Agent**. Recommended agent interval is 1 hour (3600 seconds).
3. To finalize the installation, browse to Relativity Home → MaxMessage → Finalize Installation sub-tab and after you familiarize yourself with the noted advisory click on **Finalize Installation And Reset Relativity Website Instance** button.



Note 1: MaxMessage must be installed on one Relativity workspace only.

Note 2: After install, the MaxMessage tab is located on the Home page of Relativity by default and is visible by members of the System Administrators group only. It is up to System Administrators to

allow visibility to MaxMessage tabs for different groups.

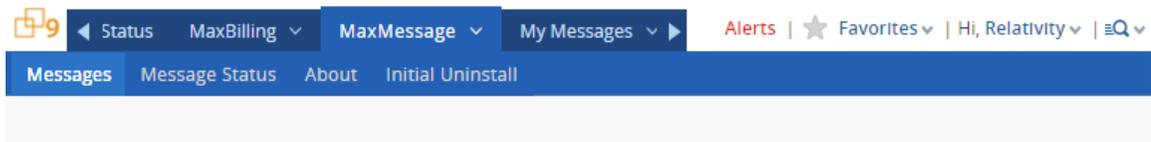
Note 3: After selecting **Finalize Installation And Reset Relativity Website Instance** button, the current Relativity Web instance will restart. Please be aware that all currently logged in users will be logged out automatically. It is recommended to carry out this step during after-hours.

3. Message Configuration

MaxMessage gives you the ability to compose messages to individual user or to a group of users on a workspace or instance level. Messages can be created in rich text and with file attachments. You may schedule to be active now or in the future.

3.1. Create New MaxMessage Message Configuration

To create a new message simply click the **+ Create New Message** button in Messages sub-tab of MaxMessage tab in Relativity. You will be redirected to “Create new message configuration” layout.

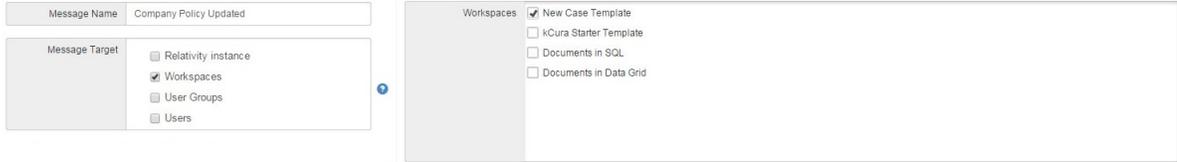


Create new message configuration

Message Configuration

| | |
|---|--|
| Message Name | <input type="text" value="New Company ISO 27001 Policy"/> |
| Message Target | <input checked="" type="checkbox"/> Relativity instance <input type="checkbox"/> Workspaces <input type="checkbox"/> User Groups <input type="checkbox"/> Users |
| <small>Note: The current time zone of the server is GMT +00:00.</small> | |
| Active From | <input type="text" value="2015/10/06 11:36 AM"/> |
| Active Until | <input type="text" value="2015/10/07 11:36 AM"/> |

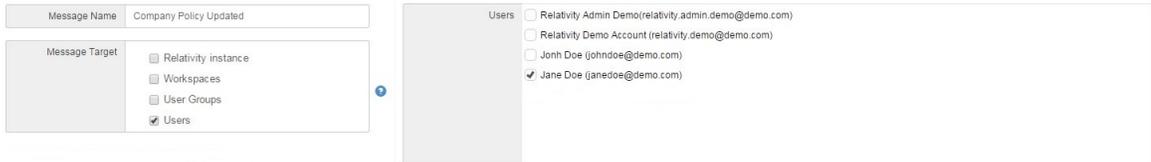
- Workspaces:** Includes all users for the selected workspaces as message target. Message creator only see workspaces they have access to.



- User Group:** Includes all users for the selected user groups as message target. Message creator only see user groups they have access to.

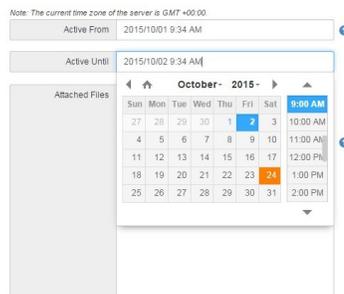


- Users:** Includes the selected users as message target. Message creator only see users they have access to.



Active From/Active Until: Set the Message Configuration active period.

Note: The current time zone of the server is GMT +00:00.



Attached Files: You can attach up to 5 files, 10MB each.

Message Content Editor: Enter your message in rich text up to 10 000 characters.

Enable Configuration: Set your configuration to enabled or disabled. Disabled messages will not be processed and no notification will be sent for them.

Note 1: The active period for the message is set for the timezone of the server. For reference timezone information is available in the note above the Active From field.



Note 2: In Active From and Active Until fields you set the message active period. In this period all the users that are message target will have this message available in their “Current Messages” sub tab. After the period expires the message will be present in “Previous Messages” sub tab.

4. Created Messages

Under “Messages” sub tab you will find a list with all messages created by you.

4.1. Message Information grid

Here you will find the information for all the messages created by you.

| # | ID | Actions | Name | Instance | Workspace | Group | User | Active From | Active Until | Enabled | Created By | Last Modified By |
|---|----|---------|-------------------------------|----------|-----------|-------|------|------------------------------------|------------------------------------|---------|--|--|
| 1 | 3 | | MaxMessage installed | ✓ | | | | 2015/10/02 8:21:00 AM (GMT +00:00) | 2015/10/03 8:21:00 AM (GMT +00:00) | ✓ | Relativity Admin Demo (relativity.admin.demo@demo.com) | Relativity Admin Demo (relativity.admin.demo@demo.com) |
| 2 | 2 | | New users added in Relativity | | | | ✓ | 2015/10/02 8:19:00 AM (GMT +00:00) | 2015/10/03 8:19:00 AM (GMT +00:00) | ✓ | Relativity Admin Demo (relativity.admin.demo@demo.com) | Relativity Admin Demo (relativity.admin.demo@demo.com) |
| 3 | 1 | | Company Policy Updated | | | | ✓ | 2015/10/01 2:29:00 PM (GMT +00:00) | 2015/10/02 2:29:00 PM (GMT +00:00) | ✓ | Relativity Admin Demo (relativity.admin.demo@demo.com) | Relativity Admin Demo (relativity.admin.demo@demo.com) |

#: Row number

Message ID: The ID if the message configuration

Attached files: Number of attached files

Actions: From left to right four action buttons will be displayed

- Enable/Disable:** By clicking this button you enable/disable the message configuration
- Edit:** By clicking this button you will select to edit the message configuration
- Copy To New One:** By clicking this button you will select to create a new message configuration with all the data from this message pre-loaded
- Delete:** By clicking this button you will select to delete the message configuration

Name: A name for reference (The name is a link to message display layout)

Instance: Cell will have a tick sign if **Instance** is selected as a message target

Workspace: Cell will have a tick sign if **Workspace** is selected as a message target

Group: Cell will have a tick sign if **User Group** is selected as a message target

User: Cell will have a tick sign if **User** is selected as a message target

Active From: Active period start date and time

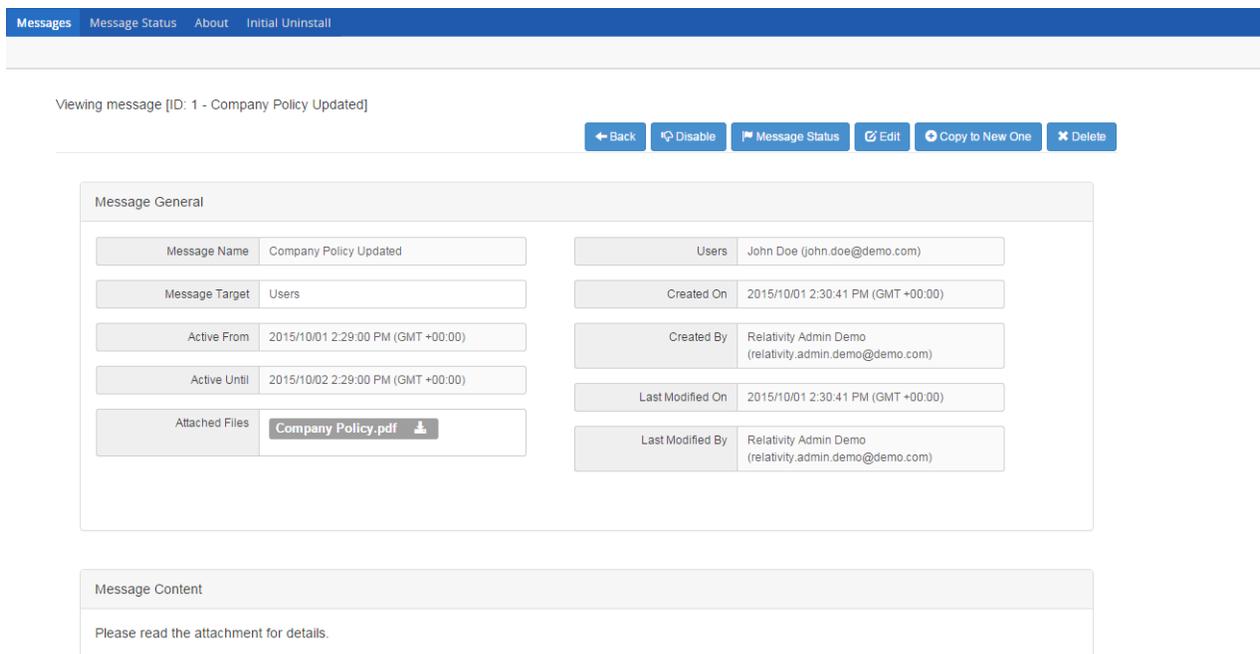
Active Until: Active period end date and time

Enabled: Shows a tick sign if a message is enabled

Created By: The user who created the message configuration will be displayed

Last Modified By: The user who has last modified the message configuration
will be displayed

4.2. Message Display



The screenshot shows the MaxMessage web interface. At the top, there is a navigation bar with links: Messages, Message Status, About, and Initial Uninstall. Below this, a message is displayed with the ID: 1 - Company Policy Updated. A row of action buttons is visible: Back, Disable, Message Status, Edit, Copy to New One, and Delete. The main content area is divided into two sections: 'Message General' and 'Message Content'. The 'Message General' section contains a table of message details:

| | | | |
|----------------|--|------------------|--|
| Message Name | Company Policy Updated | Users | John Doe (john.doe@demo.com) |
| Message Target | Users | Created On | 2015/10/01 2:30:41 PM (GMT +00:00) |
| Active From | 2015/10/01 2:29:00 PM (GMT +00:00) | Created By | Relativity Admin Demo (relativity.admin.demo@demo.com) |
| Active Until | 2015/10/02 2:29:00 PM (GMT +00:00) | Last Modified On | 2015/10/01 2:30:41 PM (GMT +00:00) |
| Attached Files | Company Policy.pdf  | Last Modified By | Relativity Admin Demo (relativity.admin.demo@demo.com) |

The 'Message Content' section contains the text: "Please read the attachment for details."

Action Buttons: In this panel from left to right six buttons are displayed:

1. **Back:** Gets you back to last page.
2. **Enable/Disable:** Enables and disables message configuration.
3. **Message Status:** Displays message acknowledgment status.
4. **Edit:** By clicking this button you will select to edit the message configuration
5. **Copy To New One:** By clicking this button you will select to create a new message configuration will all the data from this configuration pre-loaded
6. **Delete:** By clicking this button you will select to delete the message configuration.

Message Name: A name for reference



Message Target: The selected message target:

Active From: Active period start date

Active Until: Active period end date

Attached Files: The attached files are displayed and can be downloaded from the download button next to the name

Users/User Group/Workspaces/Instance: All participating targets

Created On: Message create date

Created By: The user who created the message

Last modified on: Message last modified date and time

Last modified By: The user who last modified the message

Message content: Shows the message in rich text

5. Message Status Layout

Under Message Status sub-tab, view acknowledgment status for any of the messages you have created (in case you are a member system administrator group you will be able to see any of the messages).

5.1. Message Status information grid

| # | User ID | User Name | Status | Notification Seen On | Acknowledged On | Attachment Download Status |
|---|---------|---|--------------|----------------------------------|---------------------------------|--|
| 1 | 9 | Relativity Admin Demo (relativity.admin.demo@kcura.com) | Acknowledged | 2015/12/17 9:36 AM (GMT +00:00) | 2015/12/17 9:36 AM (GMT +00:00) | 1/2 1. demo_manual_1.pdf not downloaded yet 2. demo_manual_2.pdf downloaded on 2015/12/17 9:37 AM (GMT +00:00) |
| 2 | 777 | Relativity Service Demo (relativity.service.demo@kcura.com) | Not Seen | | | 0/2 1. demo_manual_1.pdf not downloaded yet 2. demo_manual_2.pdf not downloaded yet |
| 3 | 1020774 | John Doe (john.doe@tsdservices.com) | Seen | 2015/12/17 10:30 AM (GMT +00:00) | | 0/2 1. demo_manual_1.pdf not downloaded yet 2. demo_manual_2.pdf not downloaded yet |

#: Row Number.

User ID: The user ID is displayed.

User Name: The name and email of the user.

Status: Acknowledgment status of the user for the current message .

- Not Seen:** Message notification was not shown to the user (means that they were offline during message active period)
- Seen:** Message notification was shown to user and they opted to acknowledge later



3. **Acknowledged:** User acknowledged the message

Notification Seen On: Date and time the user has seen the message (If message is not yet seen field is left blank).

Acknowledged On: Date and time the user has acknowledged the message (If the message is not yet acknowledged field is left blank).

Attachment Download Status: Shows whether an attachment is downloaded or not. And when it is downloaded if downloaded.

5.2. Download to PDF Button

By clicking "Download To PDF" button user can download current message status in PDF form. PDF contains general message information and user message acknowledgment history.

6. My Messages Tab

6.1. MyMessages Sub-tabs

Current Messages: Displays all the messages addressed to you with current active period.

Previous Messages: Displays all the messages addressed to you with expired active period.

6.2. Current Messages / Previous Messages information grid

| # | ID | Name | Acknowledged On | Active From | Active Until | Created On | Created By | Last Modified On | Last Modified By |
|---|----|-------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|--|------------------------------------|--|
| 1 | 3 | MaxMessage installed | 2015/10/02 8:30:25 AM (GMT +00:00) | 2015/10/02 8:21:00 AM (GMT +00:00) | 2015/10/03 8:21:00 AM (GMT +00:00) | 2015/10/02 8:22:40 AM (GMT +00:00) | Relativity Admin Demo (relativity.admin.demo@demo.com) | 2015/10/02 8:22:40 AM (GMT +00:00) | Relativity Admin Demo (relativity.admin.demo@demo.com) |
| 2 | 2 | New users added in Relativity | | 2015/10/02 8:19:00 AM (GMT +00:00) | 2015/10/03 8:19:00 AM (GMT +00:00) | 2015/10/02 8:21:01 AM (GMT +00:00) | Relativity Admin Demo (relativity.admin.demo@demo.com) | 2015/10/02 8:21:01 AM (GMT +00:00) | Relativity Admin Demo (relativity.admin.demo@demo.com) |
| 3 | 1 | Company Policy Updated | 2015/10/01 2:30:41 PM (GMT +00:00) | 2015/10/01 2:29:00 PM (GMT +00:00) | 2015/10/02 2:29:00 PM (GMT +00:00) | 2015/10/01 2:30:41 PM (GMT +00:00) | Relativity Admin Demo (relativity.admin.demo@demo.com) | 2015/10/01 2:30:41 PM (GMT +00:00) | Relativity Admin Demo (relativity.admin.demo@demo.com) |

#: Row number

Message ID: The id of the message configuration

Attached Files: Number of attached

Name: A name for reference

Acknowledged On: Date and time you have acknowledged the message

Active From: Active period start date

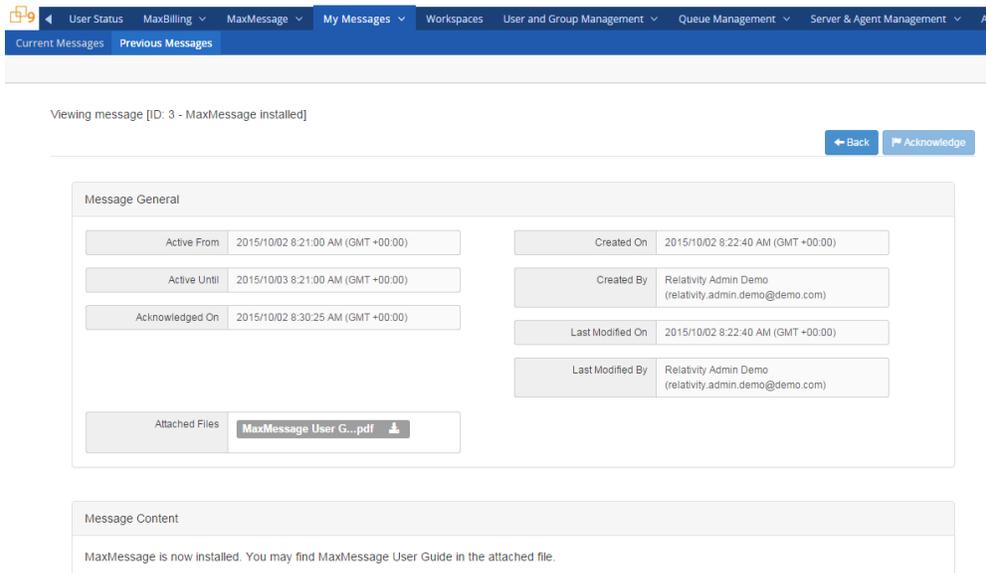
Active Until: Active period end date

Created On: Date and time the message configuration is created

Created By: The user who created the message

Last Modified on: Last modification date and time

Last Modified By: The user who has last modified the message



6.3. Current Messages / Previous Messages message display

Action Buttons: In this panel from left to right two buttons are displayed:

1. **Back:** Gets you back to last page.
2. **Acknowledge:** Acknowledges the current configuration (If message is already acknowledged the button will be inactive).

Active From: Active period start date.

Active Until: Active period end date.

Acknowledged on: The date and time the message was acknowledged (If the message is not acknowledged yet the field will be blank)

Attached files: Number of attached files will be displayed

Created On: Message create date and time

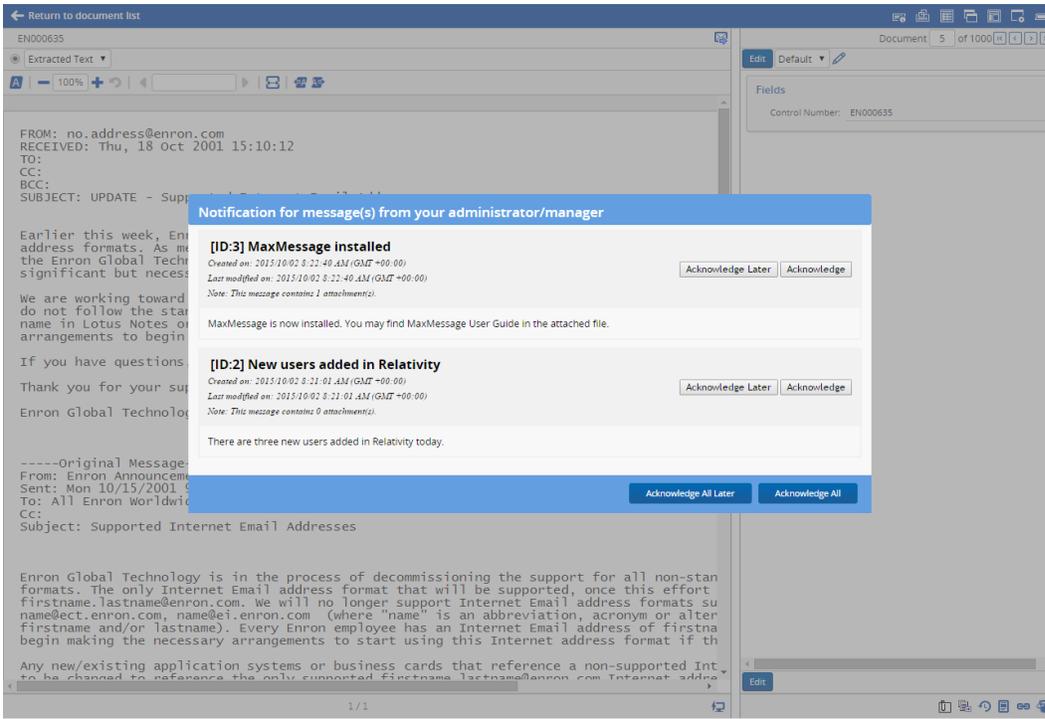
Created By: The user who created the message

Last modified on: Message last modified date and time

Last modified By: The user who last modified the message

Message content: Shows the message in rich text.

7. Notification Pop Up Panel



The new-message(s) notification panel pops up when the target user is logged in Relativity and the message(s) targeted to the user are in their active periods. No matter where in Relativity the user might be or what they might be doing, this notification pops up as shown in the screenshot above. They do not have any option to close or dismiss the panel – i.e. they have to Acknowledge now or opt to Acknowledge Later. If the message active period begins while the user is logged off, the notification panel will be displayed on their next login.

7.1. Notifications panel layout

The information for the message which will be displayed on the notifications panel is:

1. Message ID and name
2. Created on
3. Last Modified on
4. Number of attachments information.
5. Message Content.

7.2. Notifications panel action buttons

Acknowledge Later: Acknowledge the message later.

Acknowledge: Acknowledge the message now.

Acknowledge All Later: Acknowledge all the messages later.

Acknowledged All: Acknowledge all the messages now.

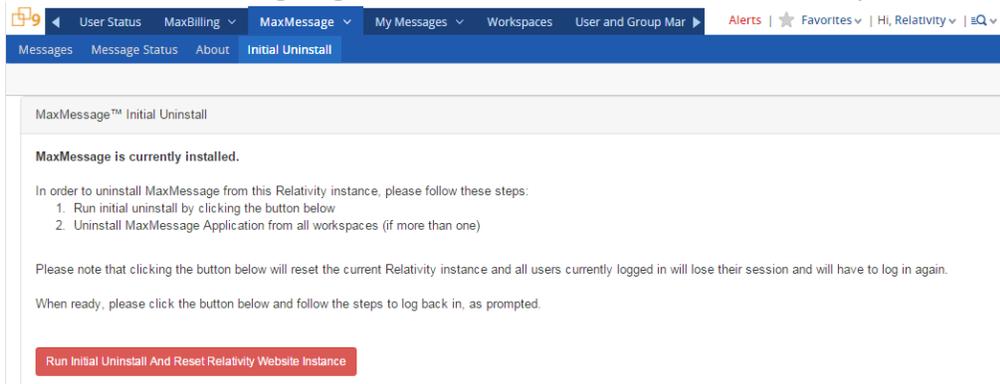
Note 1: If a target user does not log to Relativity while the message active period lasts, the message notification will not pop-up. The message will be available in “Previous Messages” sub-tab .

Note 2: After select either to acknowledge message now or acknowledge message later you will be able to see this message in “Current Messages” sub-tab. During the active period message will be available in “Current Messages” sub-tab.

8. Uninstalling MaxMessage

In order to uninstall MaxMessage, simply go to the following steps:

1. Under Relativity Home → MaxMessage → Initial Uninstall sub-tab and after you familiarize yourself with the noted advisory click **Run Initial Uninstall And Reset Relativity Website Instance** button.
2. Uninstall MaxMessage Relativity application from the Workspace on which it is installed.
3. Delete **MaxMessage Agent** instance. It is recommended to carry out this step during after-hours.



9. kCura Disclaimer

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