

User Guide



Relativity® 10.2+

Version 1.1

Contents

What is MaxMessage?	3
Installation	3
Upgrade.....	4
New Message	4
External Recipients.....	7
Adding External Recipients	7
Created Messages	8
Message Display.....	9
Message Status	10
Download to PDF Button	11
My Messages Tab	11
Current Messages	11
Previous Messages.....	11
Current / Previous Messages - message display	12
Pop Up Notification.....	12
Notifications panel action buttons	13
Email Notification.....	13
Target users	14
External recipients	14
Message creators	14
Uninstalling MaxMessage	14
Relativity® disclaimer	15

What is MaxMessage?

MaxMessage is a Relativity® application that is designed to **improve communication** between Relativity® administrators, project managers, and the corresponding teams and users.

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, instance level and even outside Relativity®.

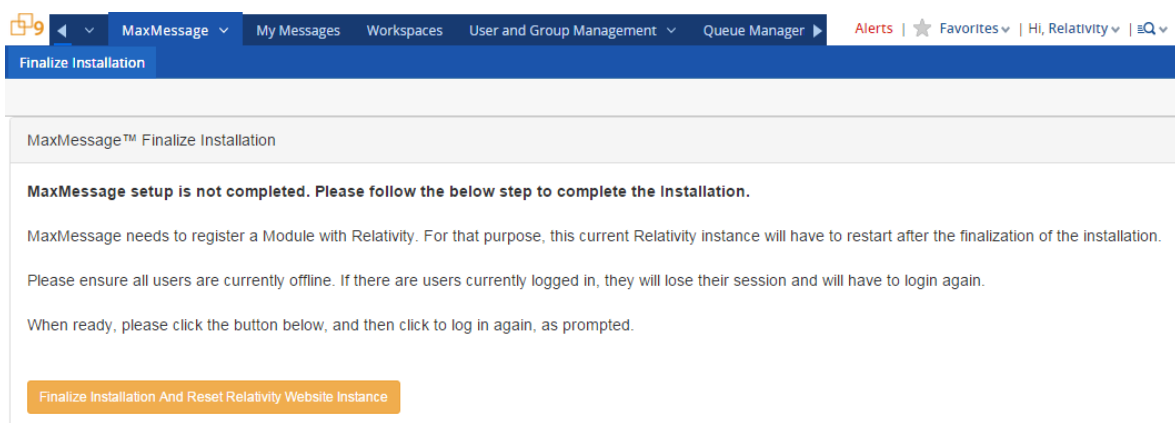
Installation

To install MaxMessage as a Relativity® administrator:

1. Upload the provided .RAP file in the Application Library
2. Select a workspace on which MaxMessage to be installed

Note: MaxMessage must be installed on one workspace only.

3. To finalize the installation, navigate to **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: 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.

Note: Once the installation is completed, the MaxMessage tab is located on admin level and is visible by members of the System Administrators group or groups that have Instance permissions. It is up to System Administrators to allow visibility to MaxMessage tabs for other groups.

Note: You must copy *TSD.RelativityMaxMessage.WebPieces.dll* which is stored in the *EDDS/bin* directory on the Web Server that was utilized upon the installation process and distribute it in the Relativity installation folder on the rest of the Web Servers manually (the folder should be under the following or a similar path: *C:\Program Files\kCura Corporation\Relativity\EDDS\bin*).

4. Create one instance of the **MaxMessage Agent** – the agent is responsible for sending email notifications when the Relativity® users have not acknowledged the messages and for sending the corresponding messages that are targeted for External Recipients (non-Relativity users)

Upgrade

To upgrade MaxMessage:

1. Upload the provided .RAP file in the Application Library.
2. Upgrade the workspace on which MaxMessage is installed.
3. Ensure MaxMessage agent is enabled.

New Message

To create a new message:

1. Navigate to **MaxMessage** tab -> **Messages**
2. Click **Create New Message** button. **Create new message configuration** layout opens.
3. Fill in the fields
4. **Save**.

User Status | MaxMessage | My Messages | Workspaces | User and Group Management

Messages | Message Status | About | Initial Uninstall

Create new message configuration

Message Configuration

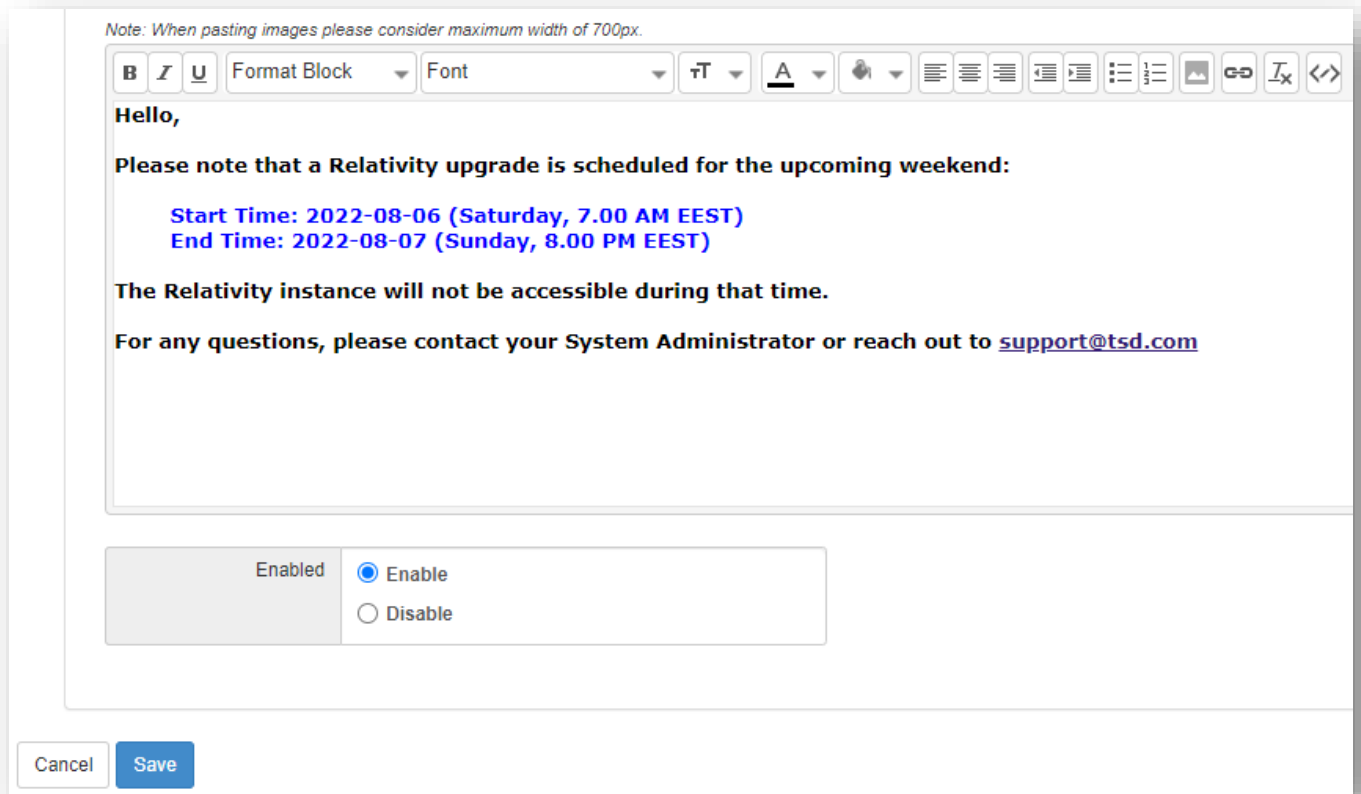
Message Name	Maintenance !!!
---------------------	-----------------

Message Target	<input type="checkbox"/> Relativity instance <input type="checkbox"/> Workspaces <input type="checkbox"/> User Groups <input type="checkbox"/> Users <input type="checkbox"/> External Recipients
-----------------------	---

Note: The current time zone of the server is GMT +03:00.

Active From	2020/10/21 5:25 PM
Active Until	2020/10/22 5:25 PM

Attached Files	<p>Attach files: (leave blank if none)</p> <ol style="list-style-type: none"> 1. <input type="button" value="Choose File"/> No file chosen 2. <input type="button" value="Choose File"/> No file chosen 3. <input type="button" value="Choose File"/> No file chosen 4. <input type="button" value="Choose File"/> No file chosen 5. <input type="button" value="Choose File"/> No file chosen
-----------------------	--



- **Message Name** - name for reference
- **Message Target** - select the message target/s:
 - **Relativity Instance** - select all Relativity® users as a message target. Only members of System Admin group will be able to create a message with a target “Relativity Instance”
 - **Workspaces** - select from users with enabled access to the corresponding workspaces as a message target. Message creators only see workspaces they have access to
 - **User Group** - select from users who belong to the corresponding User Groups as a message target
 - **Users** - select from all the Relativity® users
 - **External Recipients:** select from External Recipients (see [External Recipients](#) section)
- **Active From/Active Until** - set the Message Configuration active period.

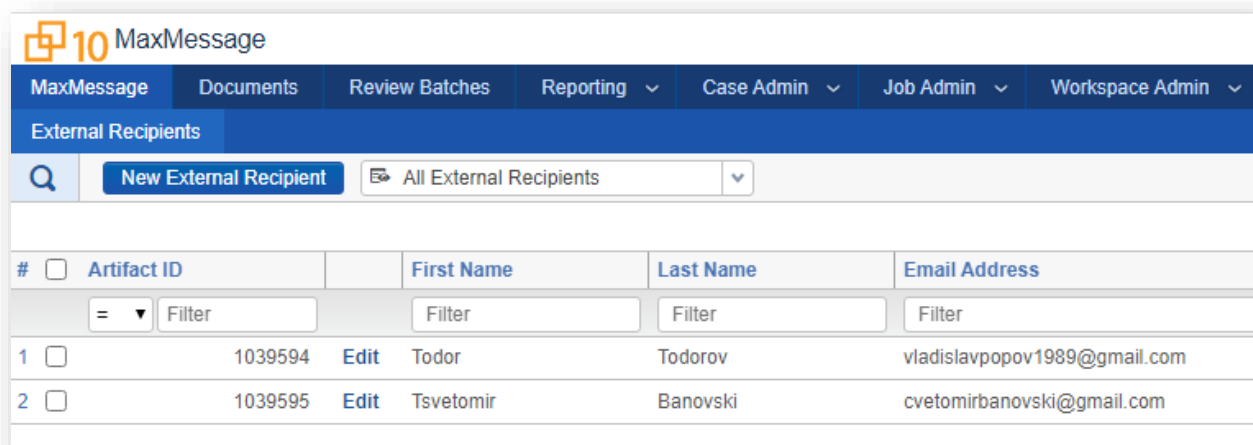
Note: The active period for the message is set for the time zone of the server. For reference, the server time zone information is available in the note above the Active From field.

Note: 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.

- **Attached Files** - you can attach up to 5 files, with a limit of 10 MB 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.

External Recipients

External Recipients sub-tab is created in the workspace where the application is installed, under **MaxMessage** tab. You can add External Recipients to send them messages via email automatically. Once created, they are available to be selected when create or edit a message.



Adding External Recipients

To add External Recipients:

1. Navigate to the workspace where the application is installed -> **MaxMessage** -> **External Recipients**.
2. Click **New External Recipient** button.
3. Populate the fields:
 - **First Name** - the first name of the recipient

- **Last Name** - the Last Name of the recipient
- **Email Address** - the email address that will be used for notifications

Created Messages

Under MaxMessage -> **Messages** sub tab you will find a list with all messages created by you.

#	ID	Actions	Name	Instance	Workspace	Group	User	External Recipients	Active From	Active Until	Enabled	Created By
1	3		Welcome aboard				✓		2020/10/19 3:29 PM (GMT +03:00)	2020/12/31 9:00 PM (GMT +02:00)	✓	Plamena Ivanova (pivanova@tsd.com)
2	1		Maintenance Scheduled - 10/24/2020					✓	2020/10/19 2:09 PM (GMT +03:00)	2020/10/25 5:00 PM (GMT +02:00)	✓	Plamena Ivanova (pivanova@tsd.com)

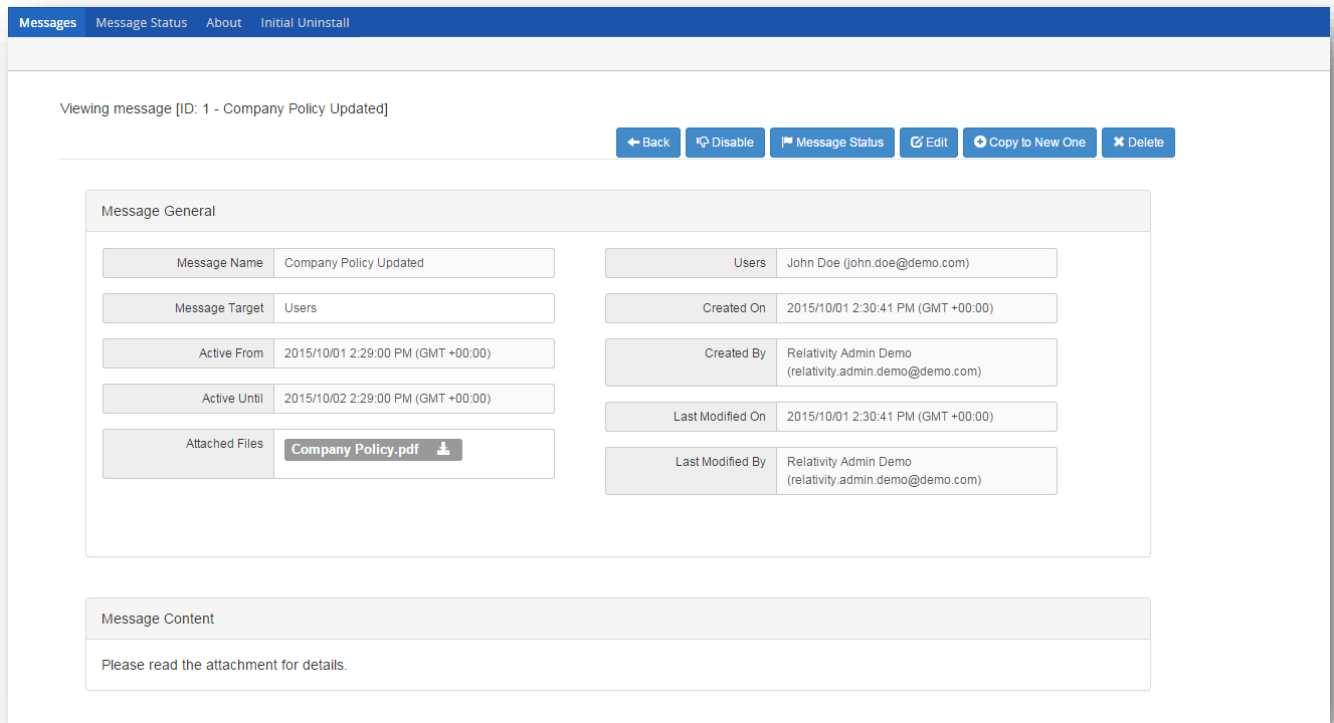
- **Message ID** - the ID of the message configuration
- **Attached files** - number of attached files
- **Actions** - from left to right four action buttons will be displayed
 - **Enable/Disable** - to enable/disable the message configuration
 - **Edit** - to edit the message configuration
 - **Copy To New One** - to create a new message configuration with all the data from this message pre-loaded
 - **Delete** - to delete the message configuration

- **Name** - name for reference. The name is a hyperlink to the 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
- **External Recipient** - cell will have a tick sign if External Recipient 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

Message Display

To view an existing message, click on its **Name**. In the panel from left to right six action buttons are displayed:

- **Back** – to get back to the last page
- **Enable/Disable** – to enable or disable message configuration
- **Message Status** – to show message acknowledgment status
- **Edit** - to edit the message configuration
- **Copy To New One** - to create a new message configuration with all the data from this configuration pre-loaded
- **Delete** - to delete the message configurat



Message Status

To view the acknowledgment status for any of the messages you have created, navigate to MaxMessage -> **Message Status**. Click **Choose a message** button and select a message.

#	User ID	User Name	Status	Notification Seen On	Acknowledged On	Attachment Download Status
1	1017451	Vladislav Popov (vpopov@tsd.com)	Acknowledged	2020/10/19 5:17 PM (GMT +03:00)	2020/10/19 5:17 PM (GMT +03:00)	0/2 1. TSD Company Policy.pdf not downloaded yet 2. TSD Employee Handbook.pdf not downloaded yet
2	1017455	Tsvetomir Banovski (tbanovski@tsd.com)	Not Seen			0/2 1. TSD Company Policy.pdf not downloaded yet 2. TSD Employee Handbook.pdf not downloaded yet

The following information is available:

- **User ID** - user ID of the targeted users

- **User Name** - name and email of the targeted users
- **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
 - **Acknowledged** – the user has acknowledged the message
 - **Not Sent** - the message has not been sent yet (applicable only for External Recipients)
 - **Sent** - the message has been sent via email (applicable only for External Recipients)
- **Notification Seen On** – the date when user saw the message
- **Acknowledged On** – the date when user acknowledged the message
- **Attachment Download Status** - shows whether attachments were downloaded or not.

Download to PDF Button

Download To PDF button downloads the current message status report in PDF form. PDF contains general message information and user message acknowledgment history.

My Messages Tab

Current Messages

Messages with current active period, addressed to you, are available in My Messages -> **Current Messages** tab.

Previous Messages

Messages with expired active period, addressed to you, are available in My Messages -> **Previous Messages** tab.

#	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)

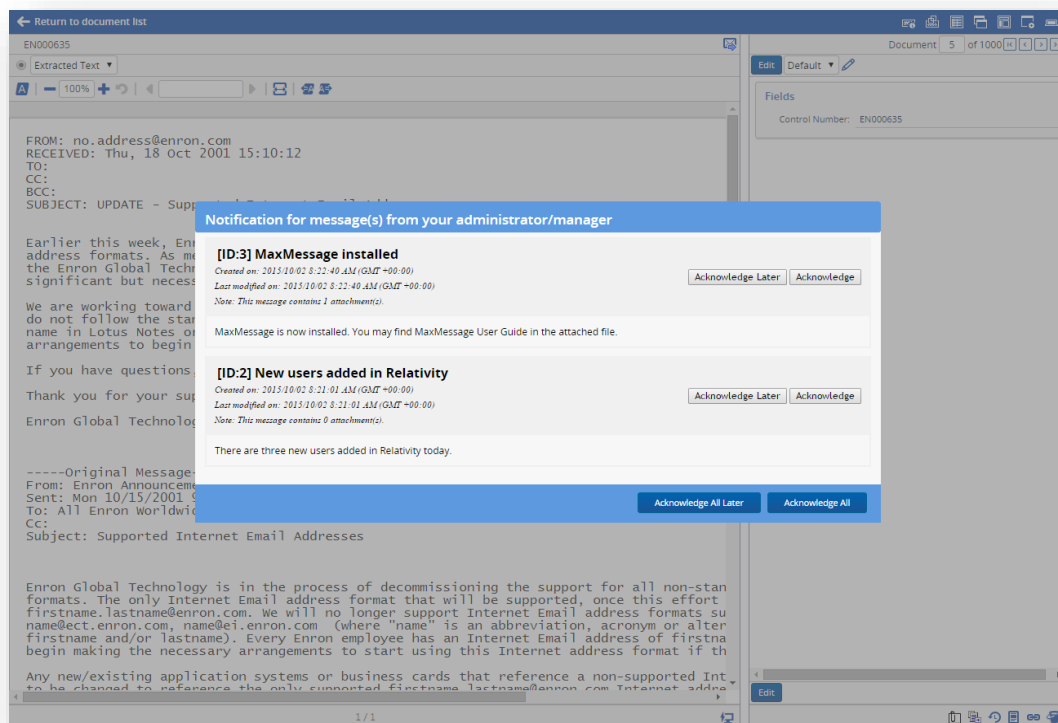
Current / Previous Messages - message display

To view a message, click on its Name. In the panel from left to right two action buttons are displayed:

- **Back** – to get back to last page
- **Acknowledge** – to acknowledges the current configuration (If message is already acknowledged the button will be inactive)

Pop Up Notification

The new-message(s) notification panel pops up when the target user is logged in 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, the notification pops up. The users do not have any option to close or dismiss the panel – i.e., they either have to Acknowledge, or 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.



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: 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: After selecting to acknowledge the messages, users will be able to see them in Current Messages sub-tab. During the active period messages will be available in Current Messages sub-tab.

Email Notification

MaxMessage application sends email notifications.

Target users

Relativity® target users who have not acknowledged the corresponding messages will receive the full message information, including attachments (if any). The emails are sent once for the message active period.

External recipients

All the targeted External Recipients will receive the full message information, including attachments (if any). The emails are sent once for the message active period.

Message creators

The message creators will receive message status reports in PDF (see [Message Status](#) section). The emails are sent on daily basis for the message active period.

Uninstalling MaxMessage

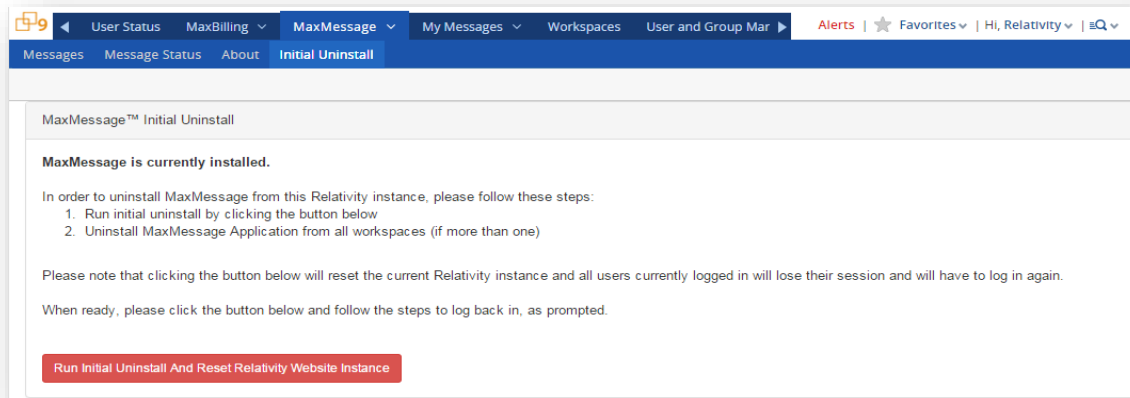
To uninstall MaxMessage on Relativity versions below 12.1, complete the following steps:

1. Delete the **MaxMessage Agent** instance.
2. Navigate to **MaxMessage** tab -> **Initial Uninstall** sub-tab and after you familiarize yourself with the noted advisory click **Run Initial Uninstall And Reset Relativity Website Instance** button.
3. Uninstall **MaxMessage** application from the workspace on which it is installed.
4. Delete **MaxMessage Resource Files**

To uninstall MaxMessage on Relativity versions above 12.1, complete the following steps:

1. Delete the **MaxMessage Agent** instance.
2. Navigate to **MaxMessage** tab -> **Initial Uninstall** sub-tab and after you familiarize yourself with the noted advisory click **Run Initial Uninstall And Reset Relativity Website Instance** button.
3. Delete **MaxMessage Resource Files**
4. Uninstall **MaxMessage** application from the workspace on which it is installed.

Note: It is recommended to carry out these steps during off-hours.



Relativity® disclaimer

Relativity® and its support team carry no responsibility towards this product. This product may only be used by parties with valid licenses for Relativity®, a product of Relativity® Corporation.