Delegate

Self-Provisioning Tool

User Guide

Updated for 2.5

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1. Installing and Upgrading

1.1 System Requirements

The only system requirement for Delegate is Relativity version. The following Relativity versions are supported.

- Relativity 9.4.541.2
- Relativity 9.5.133.118 - Relativity 9.5.370.136
- Relativity 9.5.370.135+

1.2 Installing Delegate

Installing Delegate is incredibly simple. We take advantage of the Admin Case for installation to ensure installation is quick and easy.

1. Milyli will provide at the time of sale or through support shortly afterwards a (.rap) file which will be used to install the application
2. Login to Relativity with an account that has System Administration access
3. Navigate to Application & Scripts - Application Library
4. Click Upload Application and select the (.rap) file
5. Click on Import and this will begin the installation process

The following artifacts will be added to your Relativity instance.

- Client Administration Tab
- Delegate Tab
    - Clients sub tab
    - Delegate Profiles sub tab
    - Audit sub tab
    - Plugins sub tab
- 9 Database tables added under the ‘delegate’ database schema in the primary EDDS database
    - The eddsdbo user is made owner of this schema
- 1 Database table added under the ‘dbo’ database schema in the primary EDDS database

1.3 Upgrading Delegate

To upgrade Delegate it is recommended to follow Relativity's official documentation on upgrading applications.
You can read these instructions on the official Relativity help website located here:
https://help.relativity.com/9.5/Content/Relativity/Applications/Upgrading_applications.htm

2. Configuring Delegate

2.1 What is a Delegate Profile?

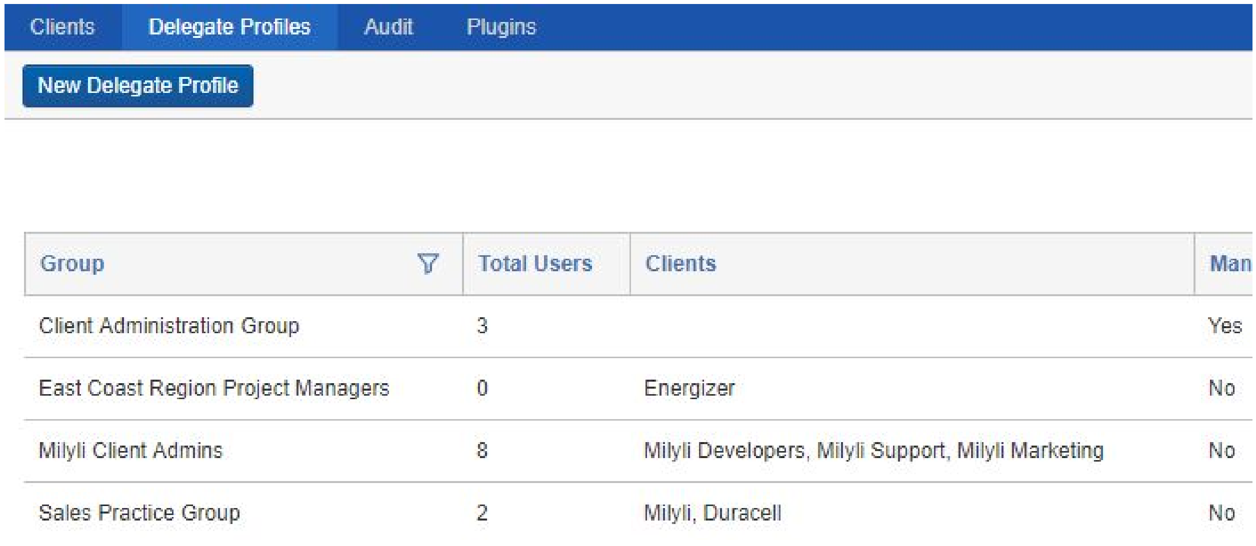
Delegate profiles allow system administrators to grant groups of users in your organization including project managers, consultants, lit support teams, or client managers the ability to manage the users, groups, matters, and workspaces for one or more clients.

The configuration of Delegate profiles allows system admins to have full control over the groups who can use Delegate and what parts of Delegate they can use when managing their assigned clients.

2.2 The Delegate Profiles Tab

The "Delegate Profiles" tab is available under the Delegate System admin tab. If you have updated from Delegate 1.2 or earlier, this tab will replace the "Configuration" tab. Upon accessing this tab you will see a list of existing Delegate profiles along with their details.

Please Note
When upgrading from a version of Delegate 1.2 or earlier your existing "Client Admin Group" configuration will be automatically converted to a Delegate Profile and no additional changes are required from your system admin.



Group	Total Users	Clients	Man
Client Administration Group	3		Yes
East Coast Region Project Managers	0	Energizer	No
Milyli Client Admins	8	Milyli Developers, Milyli Support, Milyli Marketing	No
Sales Practice Group	2	Milyli, Duracell	No

2.3 Creating & Managing Delegate Profiles

Field: Groups

The profile group is a Relativity group in your organization who will be granted the ability to manage clients with Delegate. All users of this group will be able to take advantage of the features you grant them access to through the Delegate Profile..

Best Practice
As a best practice new groups should always be created for use with Delegate profiles. Groups that are selected for use in a Delegate profile should not be used for permissions within workspaces or access to workspaces. By selecting a group for use with a Delegate profile, access to control certain parts of Relativity through Delegate will be provided.

Special Case: Users with Multiple Delegate Profile Memberships

If a user is a member of multiple groups that are used for a Delegate profile, the permissions granted to that user will be specific to the clients the profile is associated with. Take this scenario for example:

- John is a member of Group A and Group B, and both groups have a profile set up for them
- Group A manages Client A

- Group B manages Client B
- Group A can manage users for Client A
- Group B cannot manage users for Client B
- John will be able to select between Client A and Client B when using Delegate
- John has Client A selected and creates a user for Client A
- John changes his selection to Client B while still on the Users tab
- John will automatically be navigated to the group tab as he cannot manage users for Client B

Similarly, when a user is a member of two or more profiles that both can manage the same client, the permissions for that client are additive, meaning the highest available permission will be used to determine access. Consider this scenario:

- Jane is a member of Group A and Group B, and both groups have profiles set up for them
- Group A manages Client A
- Group B manages Client A
- Group A can manage users for Client A
- Group B cannot manage users for Client A
- Jane will be able to manage users for Client A

Field: Clients

When creating a Delegate profile, you have the ability to select one or many clients that the group members of the profile will be able to work with. This allows for different demographics within your organization to benefit from the use of Delegate.

Field: Group members can manage their own client

This options allows members of the selected group to utilize Delegate to manage the Client object their account is associated with. This option is intended for managed services organizations who need to allow members of their clients to perform admin actions through Delegate on their own clients.

Delegate 1.2 vs Delegate 2.0
Prior versions of Delegate required the configuration of a single group and all members of that group would automatically manage their own client. Upon updating from those versions to Delegate 2.0, the configured group will automatically have a profile created for it, and the group will have the option to manage their own client set and all prior permissions selected.

Tab Permissions

Delegate profiles provides extensive permission customizations. Each client administration tab can be toggled providing flexibility in the way the application is used. If a client administrator should not have the ability to create workspace, for example, you can remove their ability to do so.

Permissions are continually checked and enforced by the system. If a user has permissions and you remove it, they will be informed that they no longer have permission to that object and will be automatically navigated to a tab they do have access to. If a user is a member of multiple profiles for different clients and each profile has a different set of tab permissions, the permissions will be enforced as they switch between active clients.

Field: Enable and disable users

The ability to modify whether a user is enabled or disabled can be toggled for each Delegate profile. This feature works great in tandem with a new client configuration that allows for defining the default enabled state for new users. Setting this field to disabled will prevent client administrators from enabling or disabling users from both the user list and the edit user page.

Field: Modify user authorization providers

Authorization profiles can be complex for some users. This option lets you disable adding, modifying, or removing authorization profiles when your client admins create new users.

Pairs Well With
Setting this option to disabled pairs well with user templates under the Client tab. By configuring a template user with the Default Password Provider will provide an easy way to simplify the “Save and Next” process for your client admins by ensuring that new users are automatically configured and don’t need any changes.

Field: Mass import users

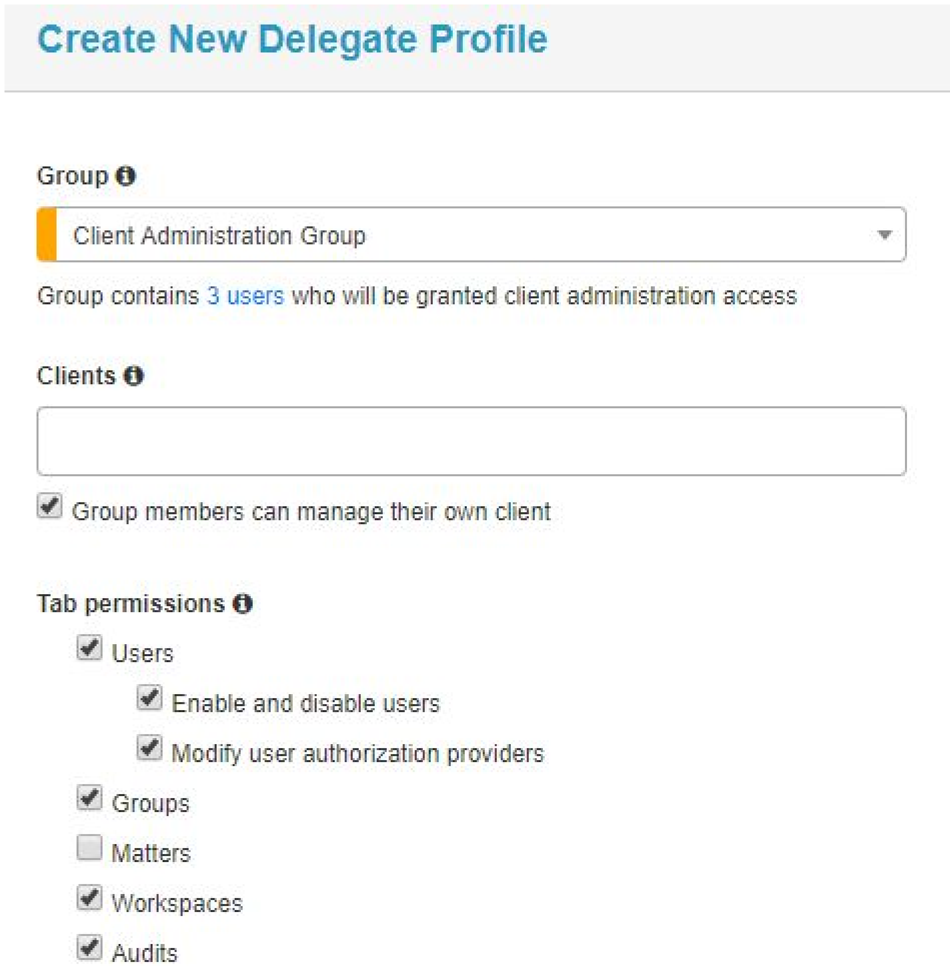
This field restricts permission for the members of the profile to utilize the mass import users form. If this is checked, the user will be presented with an additional option when creating a user to instead utilize the mass import form.

Creating Self Managing Delegate Profile

If you used Delegate prior to Delegate 2.0, you are already familiar with the process of selecting a group in the Delegate Configuration tab and having members of that group automatically able to manage their own client. If this is a fresh installation, follow these steps to recreate this functionality.

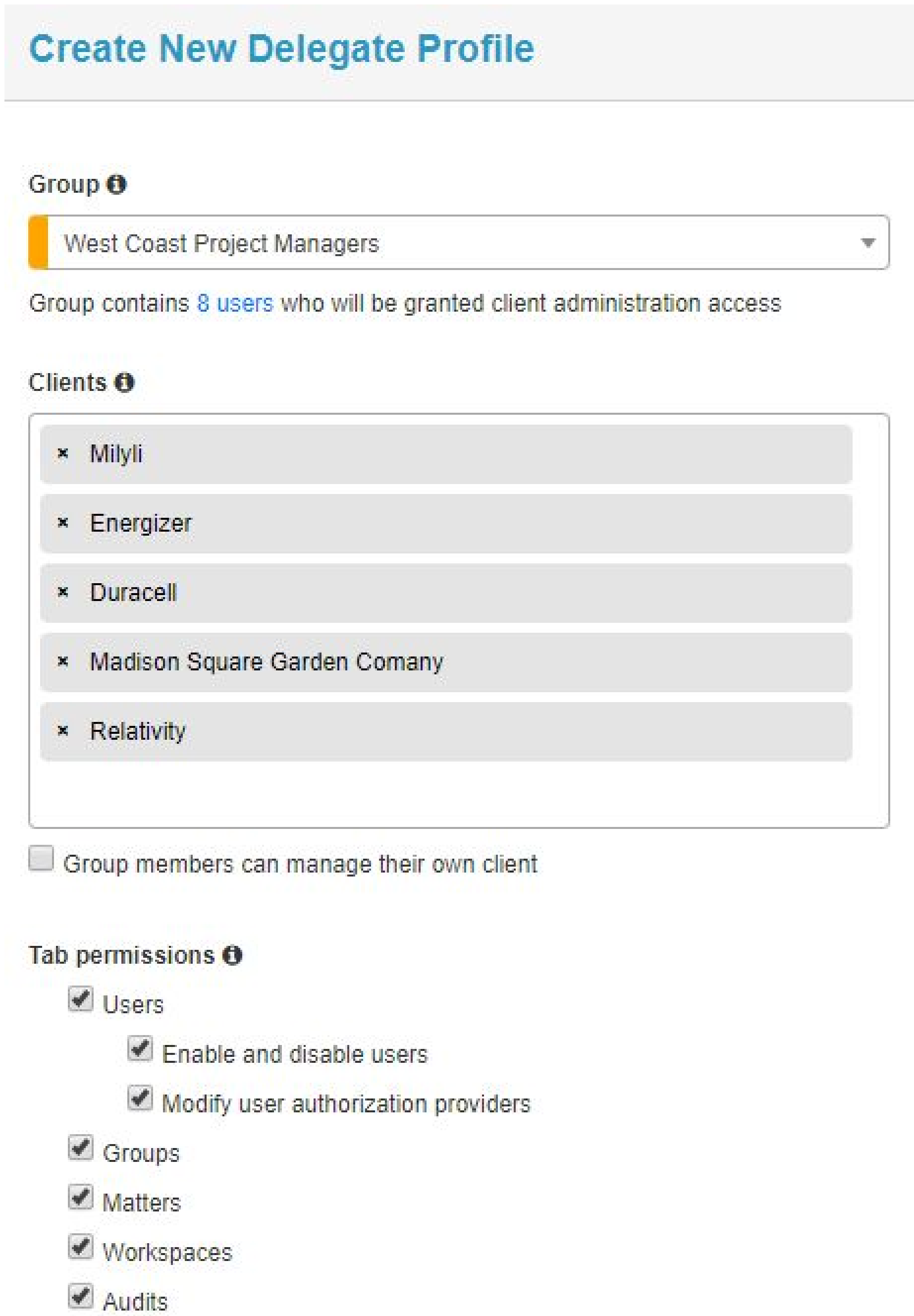
It is strongly recommended that you create a group explicitly for this Delegate profile.

1. Click on the "New Delegate Profile" button.
2. In the group dropdown, select the group you want to have the user administer their own clients.
3. Select the checkbox "Group members can manage their own client."
    a. It's important that you don't select any clients in the client box if you don't intend all users of this group to be able to manage that client!
4. Select the tabs and permissions you want clients to have access to.
    a. This is where you can prevent client admins from getting access to features that you want only your system admins to manage, such as matters.



Create a ‘Project Manager’ Delegate Profile

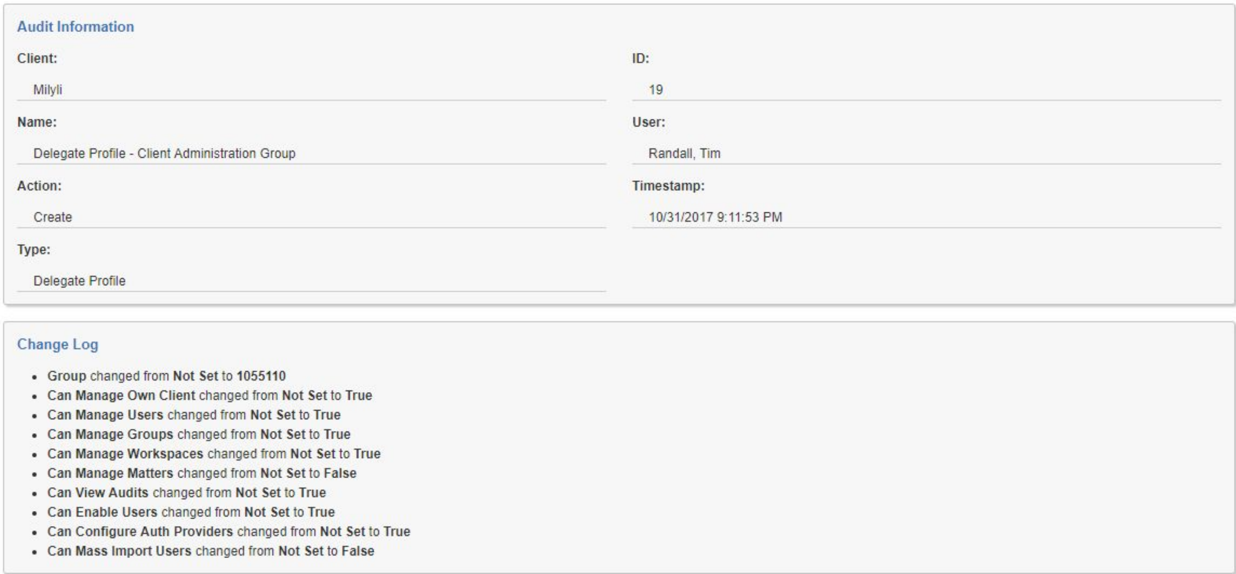
Setting up a profile for your project managers is just as easy. The following screenshots shows a typical configuration that you may use for a regional project manager group.



Delegate Profile Audits

All Delegate profile changes and additions are tracked and displayed on the system admin Delegate audit tab. You can quickly filter for these audits by filtering the "Type" field to "Delegate Profile." All audits contain information about both the initial value and the changed value for each field that has been modified.

Create Audit


Audit Information

Client: Milyli

ID: 19

Name: Delegate Profile - Client Administration Group

User: Randall, Tim

Action: Create

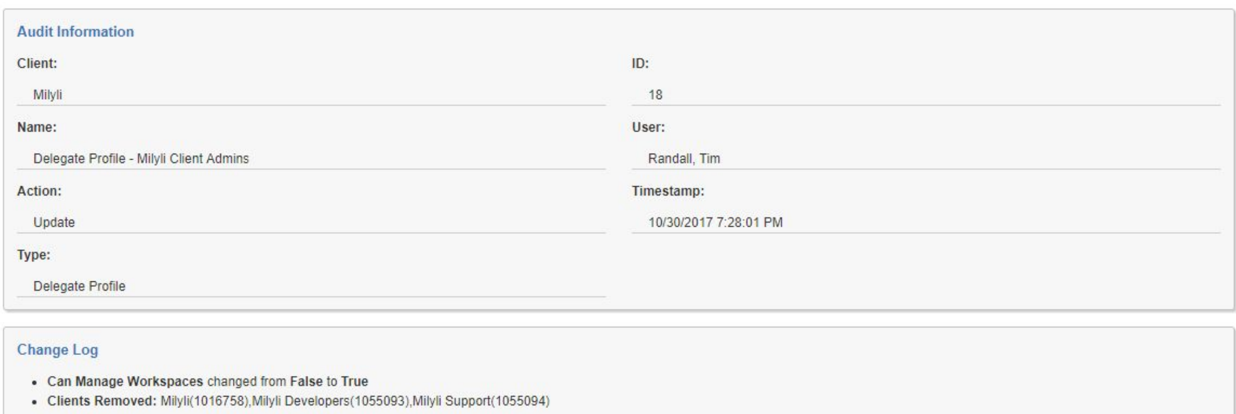
Timestamp: 10/31/2017 9:11:53 PM

Type: Delegate Profile

Change Log

- **Group** changed from **Not Set** to **1055110**
- **Can Manage Own Client** changed from **Not Set** to **True**
- **Can Manage Users** changed from **Not Set** to **True**
- **Can Manage Groups** changed from **Not Set** to **True**
- **Can Manage Workspaces** changed from **Not Set** to **True**
- **Can Manage Matters** changed from **Not Set** to **False**
- **Can View Audits** changed from **Not Set** to **True**
- **Can Enable Users** changed from **Not Set** to **True**
- **Can Configure Auth Providers** changed from **Not Set** to **True**
- **Can Mass Import Users** changed from **Not Set** to **False**

Update Audit


Audit Information

Client: Milyli

ID: 18

Name: Delegate Profile - Milyli Client Admins

User: Randall, Tim

Action: Update

Timestamp: 10/30/2017 7:28:01 PM

Type: Delegate Profile

Change Log

- **Can Manage Workspaces** changed from **False** to **True**
- **Clients Removed:** Milyli(1016758),Milyli Developers(1055093),Milyli Support(1055094)

Delete Audit


Audit Information

Client: Milyli

ID: 9

Name: Delegate Profile - Milyli Project Managers

User: Randall, Tim

Action: Delete

Timestamp: 10/31/2017 9:15:47 PM

Type: Delegate Profile

2.4 The Clients Tab

After setting up Delegate profiles, users who are members of those profiles will be able to begin using Delegate client administration. However, before they can begin creating users, the clients that they have access to will need additional configuration.

If you are already familiar with working with clients, then there are only a few new changes that you should be aware of.

Clients at a glance

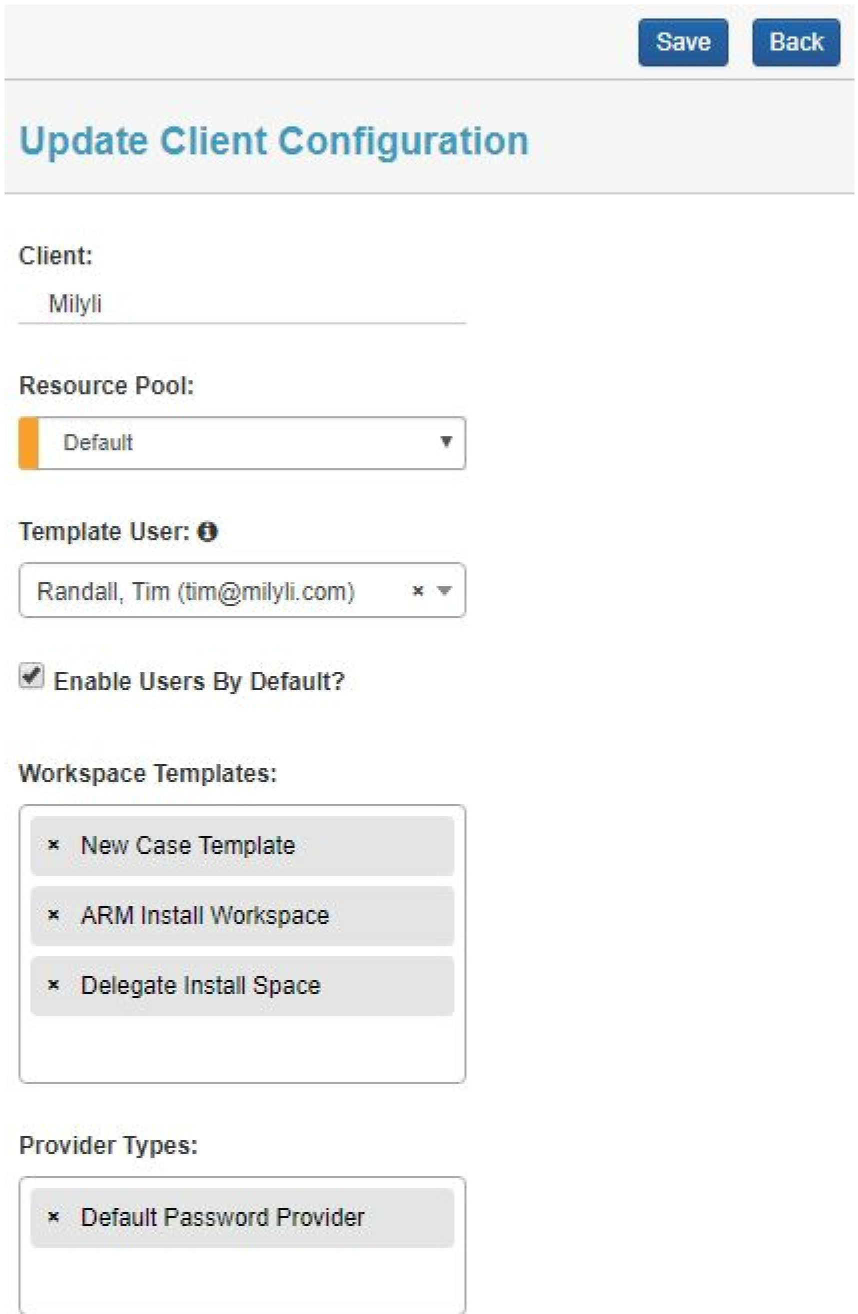
The Client system admin tab presents a full list of all of the clients in your environment. Each client can be configured independently from one another allowing for very specific setups based on what your organization needs.

Show 20 Showing 1 to 14 of 14 entries

Client	Resource Pool	Workspace Templates
Duracell	Default	New Case Template
Energizer	Default	New Case Template
Lockheed Marting	Default	New Case Template
Madison Square Garden Comany	Default	New Case Template
Milyli	Default	ARM Install Workspace, Delegate Install Space

Configuring a Client

To configure a client, click the row for the client to be modified. If there are a large number of clients, the list may need to be filtered to find a specific client. This is changed slightly from previous versions of Delegate, which displayed configuration in a modal popup.



Field: Resource Pool

The selected resource pool will be used when creating workspaces for this client. This provides strong configuration options for separating which resources will be used when client admins create workspaces. This will restrict the values that are available for file server, SQL server, and default cache location. If this is not set, workspaces for this client cannot be created.

Field: Template User

Template user allows the selection of a user whose fields values will be used as the default values when your client administrators create a new user for this client. By selecting a template user, your client admins will only need to input their first name, last name, and email address when creating new users. Client admins may override any of these values.

Default Password Provider
If the template user is configured with the "Default Password" authentication provider, then that provider will automatically be used when a client admin creates a user for this client. The invitation workflow will be kicked off automatically when creating a user in this manner.

Field: Enable Users by Default?

Checking this box will result in newly created users for this client to be enabled by default. Combine this feature with the Delegate Profile enable restriction to enforce the default state for the client.Delegate 2.0 introduces the ability to set the default enabled state of newly-created users.

Enable Them Later
By leaving this field unchecked and checking the enable restriction on the Delegate Profile will create a system where System Administrators can decide when accounts are enabled. This allows clients to create users without worrying about licenses being used up before they are needed.

Field: Workspace Templates

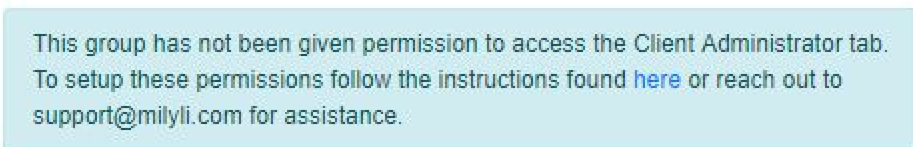
Workspace templates are the workspaces that will be available for selection as the workspace template when creating new workspaces. If this is not set, workspaces for this client cannot be created.

Field: Provider Types

This field determines which authentication providers should be available for client admins to select from when creating new users. If none are selected, no authentication providers can be configured for users that are created by the client admin.

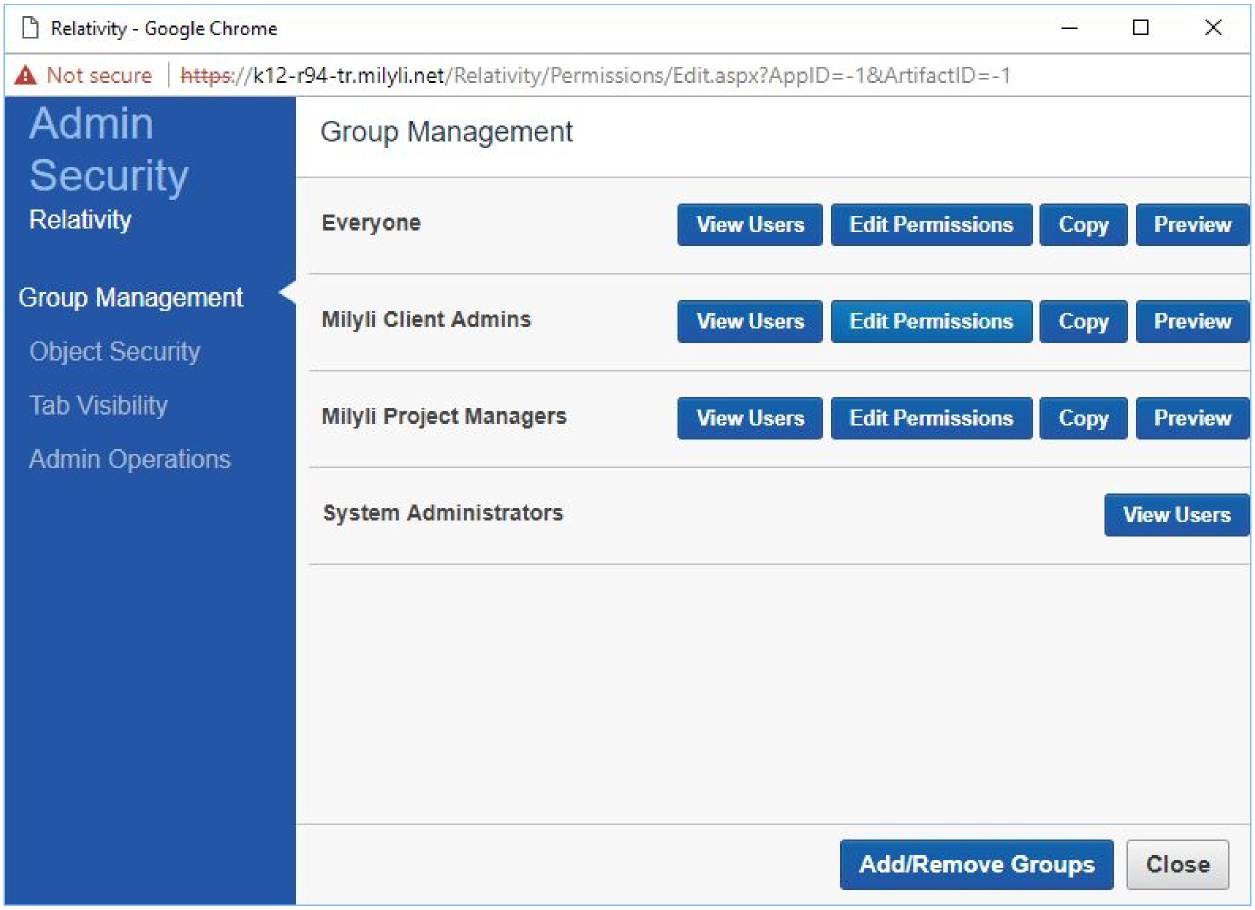
Granting Client Administration Tab Access

After creating a Delegate profile, if the group that has been selected for the profile is not able to access the Client Administration tab, a friendly message will be displayed. This article covers the changes that need to be made in order to ensure that members of that group will be able to access the Client Administration tab.

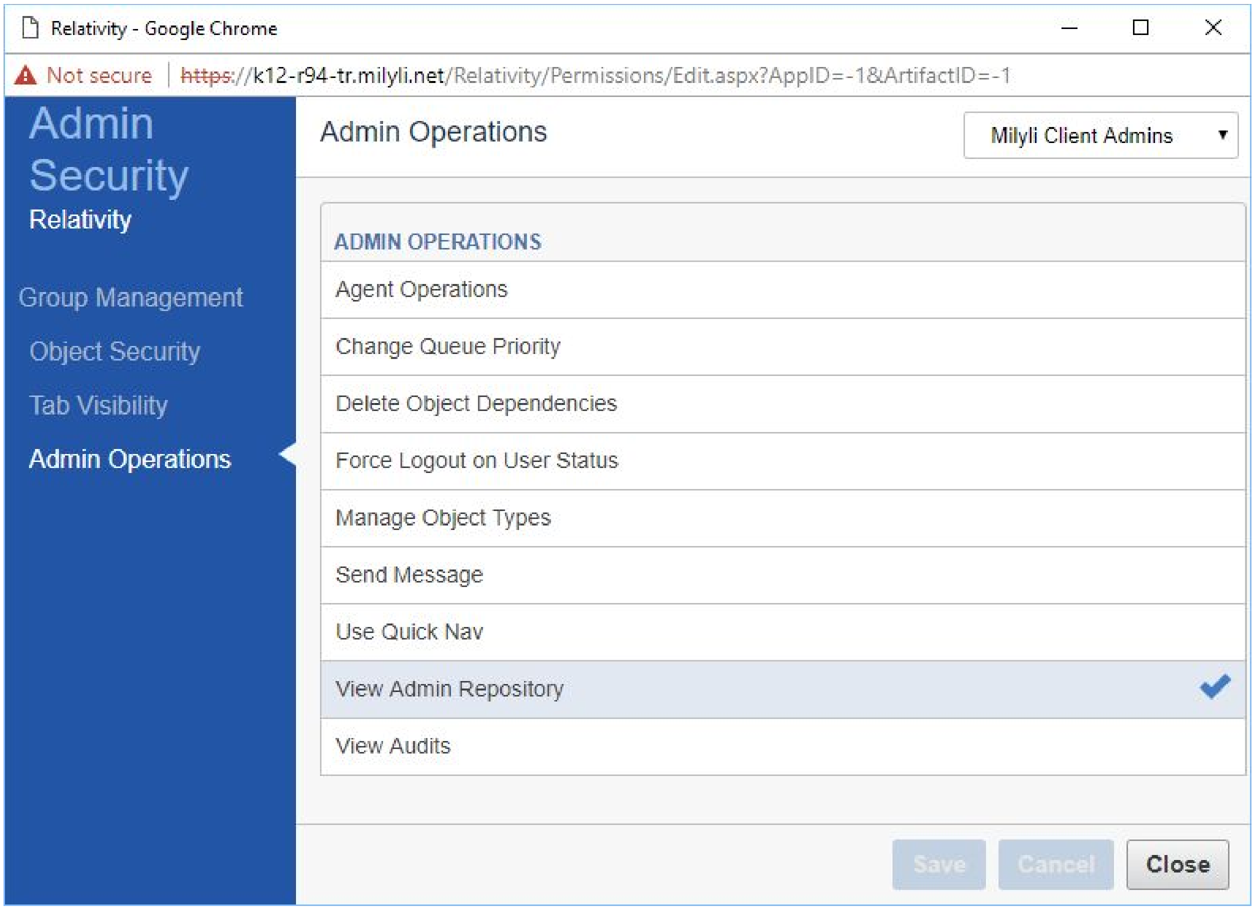


To configure access for the group, follow these steps:

1. Navigate to the Relativity Admin workspace.
2. Click the "Instance Details" tab.
3. Click the "Manage Permissions" button.
4. Click the "Add/Remove Groups" button and select the group that you selected in the Delegate Profile you created.
5. Click "Edit Permissions" for the group that you just added.

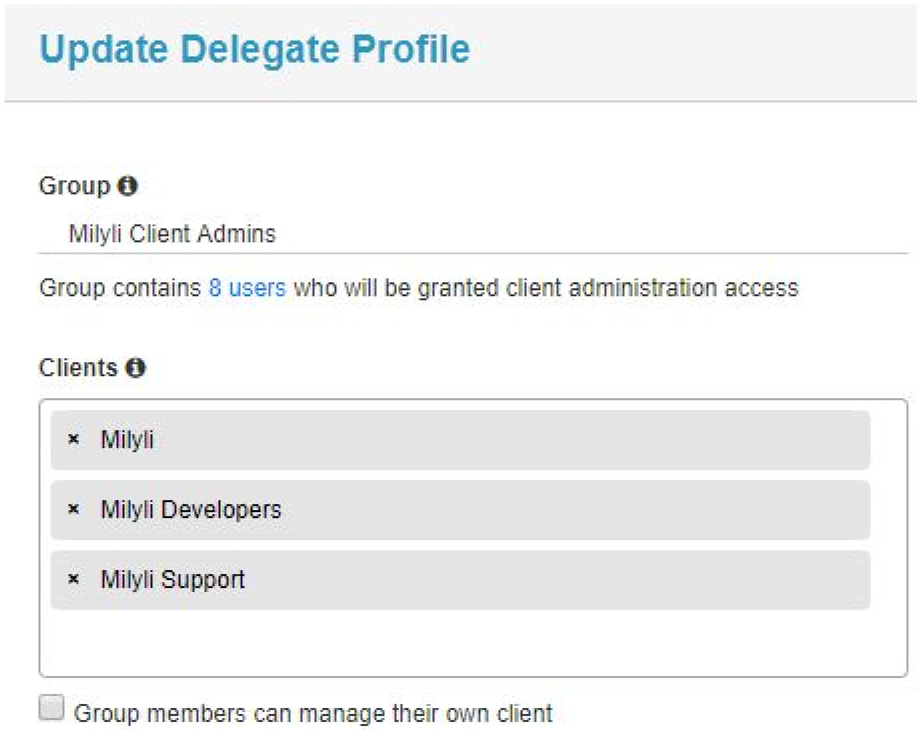


6. Click on the "Tab Visibility" navigation button in the left menu.
7. Select the "Workspaces" tab and the "Client Administration" tab.
8. Click the "Save" button.
9. Click on the "Admin Operations" navigation button in the left menu.
10. Select "View Admin Repository" admin operation.



11. Click the "Save" button

After following these steps, members of the group will now be able to access the Client Administration tab when logging into Relativity.

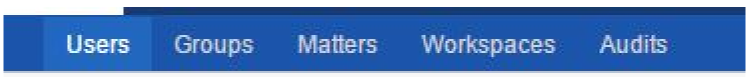

Update Delegate Profile
Group
Milyli Client Admins
Group contains 8 users who will be granted client administration access
Clients
Milyli
Milyli Developers
Milyli Support
Group members can manage their own client

3. Client Administrations

3.1 Client Administration Tab

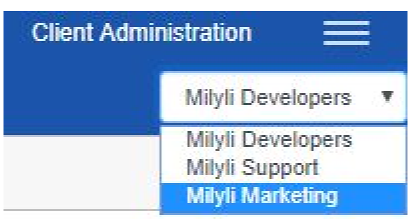
As a Delegate Client Administrator, the Client Administration tab will be visible alongside the workspace tab when you log into Relativity.

Clicking on the Client Administration tab reveals five sub-tabs where you can manage users, groups, matters, and workspaces, or view audit information. The availability of these tabs will depend on the profiles you are a member of and the permissions they have been granted.



3.2 Switching Active Client

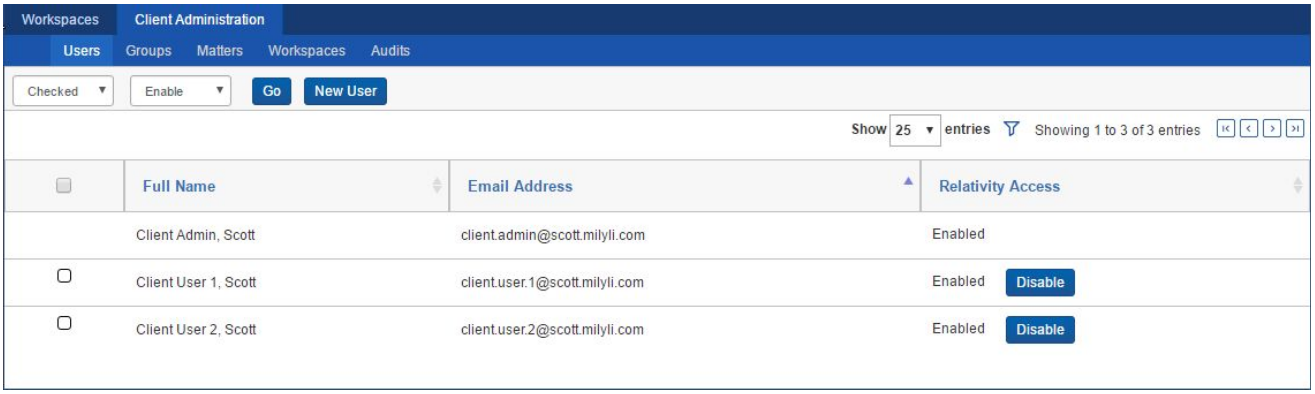
Based on the settings of your Delegate Profile you may have access to more than one client. If this is the case you can quickly switch between active clients from the menu bar after clicking on the Client Administration tab.



Selecting any client from this dropdown will switch the active client. Any action performed as a client administrator will be performed against the active client. Helper fields are provided on all forms as a reminder of which client the action will be performed against.

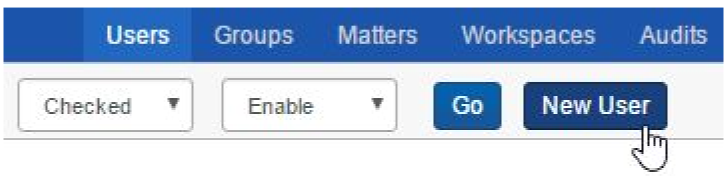
3.3 User Tab

Clicking on the user sub tab will show you a list of user's associated with the current client. From here you choose to manage or create users.



Add New Users

Select New User to add a new user to the list.



Add user details in the fields on the New User page, which includes all of the fields and default values available when adding or editing a user in Relativity. For more information on how to fill out the fields when creating or editing a user, review the following Relativity documentation on users:

https://help.kcura.com/9.5/Content/Relativity/Users.htm#Creating

When you are finished filling out user details, click Create to save the new user. To immediately create another user, click Create and New. To return to the list of users, click Back.

Template User Simplicity
When using create and new, if a template user has been defined for your profile and that template user has the default password provider as its template, it will automatically be selected and configured for you.

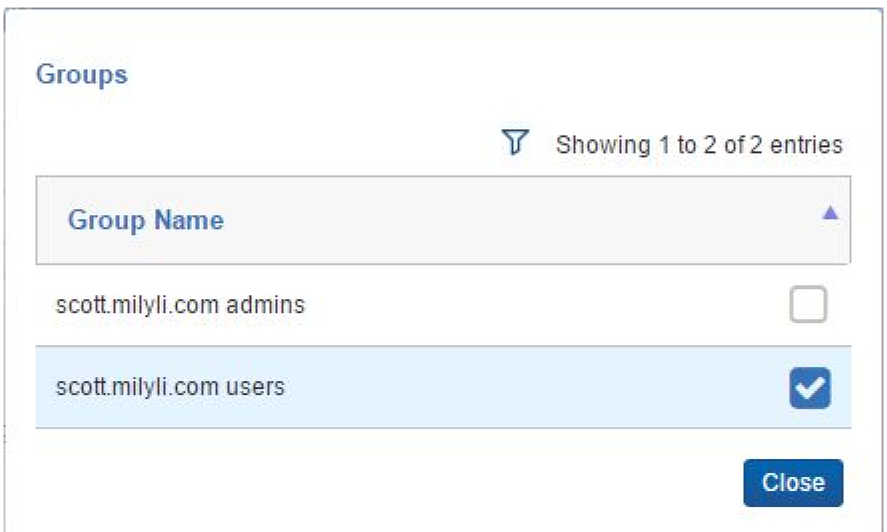
Add User to Group

Users can be added to groups using Delegate either from user details screen or from the group details screen.

From the User Details Page

To add a Relativity user to a group from the user details screen, either click on the row of an existing user in the users list or add a new user, then scroll to the Groups section at the bottom of the user details screen. Click Edit. Users can be added to groups when users are created or after the fact

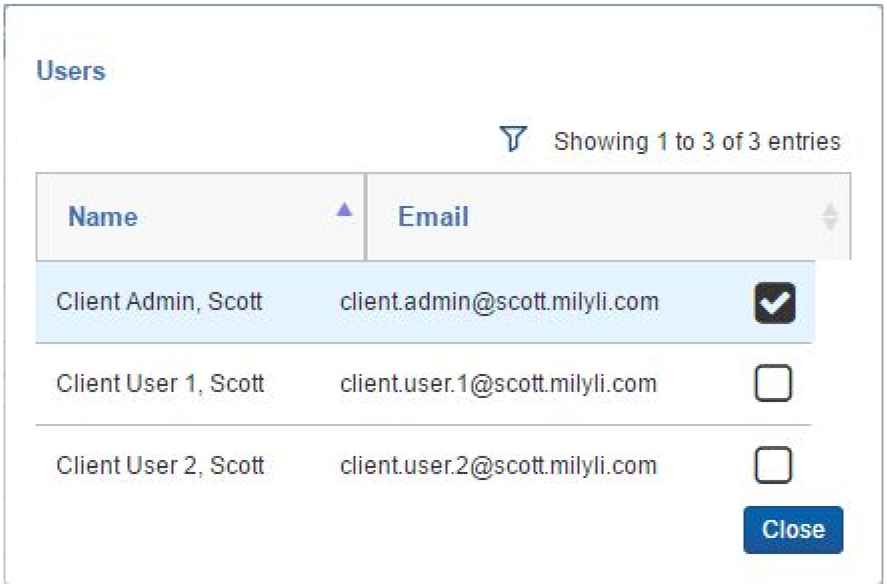
The Groups modal window will be populated with all groups associated with your client.



From the Group Details Page

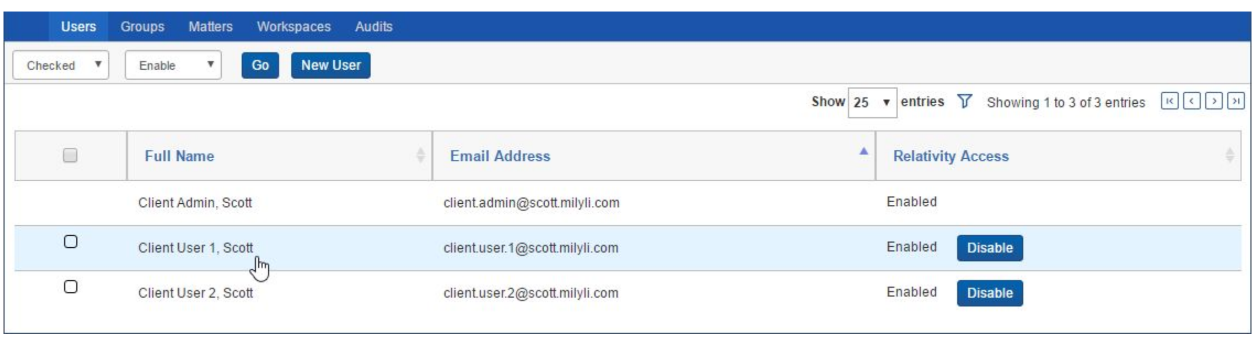
To add a Relativity user to a group from the group details screen, either click on the row of an existing group in the groups list or add a new group, then scroll to the Users section at the bottom of the group details screen. Click Edit. Users can be added to groups while groups are being created or after the fact.

The Users modal window will be populated with all users associated with your client.



Edit Users

Click the row for a particular user to edit their user details.



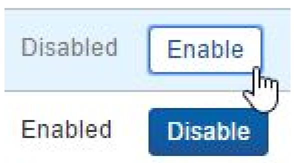
Edit the user fields as needed, then click Save to save your changes, Save and New to save your changes and create a new user, or Back to return to the users list. For more information on how to fill out the fields when creating or editing a user, review the following Relativity documentation on users:

https://help.kcura.com/9.5/Content/Relativity/Users.htm#Creating

Enable/Disable Users

In Delegate you can enable/disable individual users or enable/disable multiple users in a single action.

Enable or disable a Relativity user by clicking the relevant button in the Relativity Access column for that user. If the user is disabled, the column will say Disabled and have a button where you can click Enable.



If the user is enabled, the column will say Enabled and have a button where you can click Disable.

User License Limit
If the Enable button is not clickable for a user, you have met the user limit for the Relativity instance. Disable users in order to enable new users, or contact your Relativity system administrator.

You can also enable or disable a user by changing the Relativity Access field within the user details screen. (See section 2.3 on editing users.)

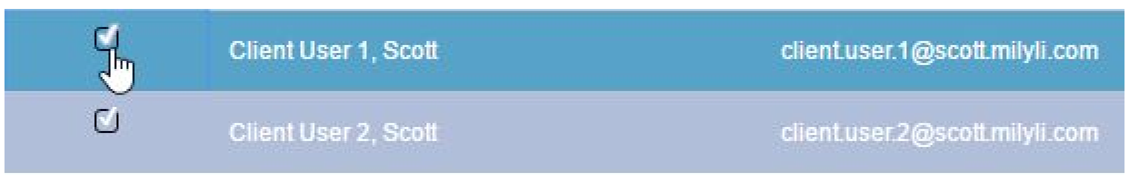
Mass Enable/Disable Users

Take the following steps to enable/disable multiple users:

1. You can optionally filter the user list before enabling/disabling multiple users. To filter, first click on the filter icon.

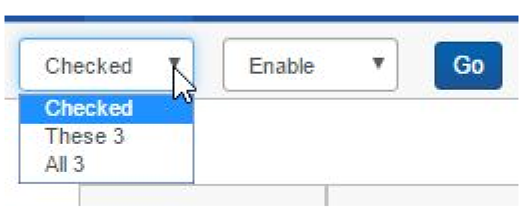
Next, filter the desired column and the user list will automatically update.

2. Individually specify which users to enable/disable by checking those users' corresponding checkboxes in the left column.

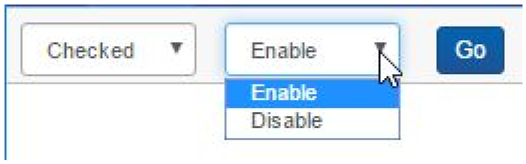


All of the Above
If you plan on enabling/disabling all users returned by the filter, or shown on the page, you do not need to check any users.

3. Specify the scope of mass enable/disable to Checked, These (filtered users on the current page), or All (filtered users on all pages).



4. Select Enable or Disable from the dropdown.



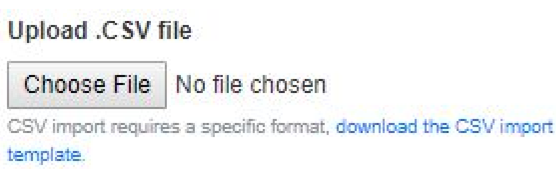
5. Click Go.

Mass Import Users

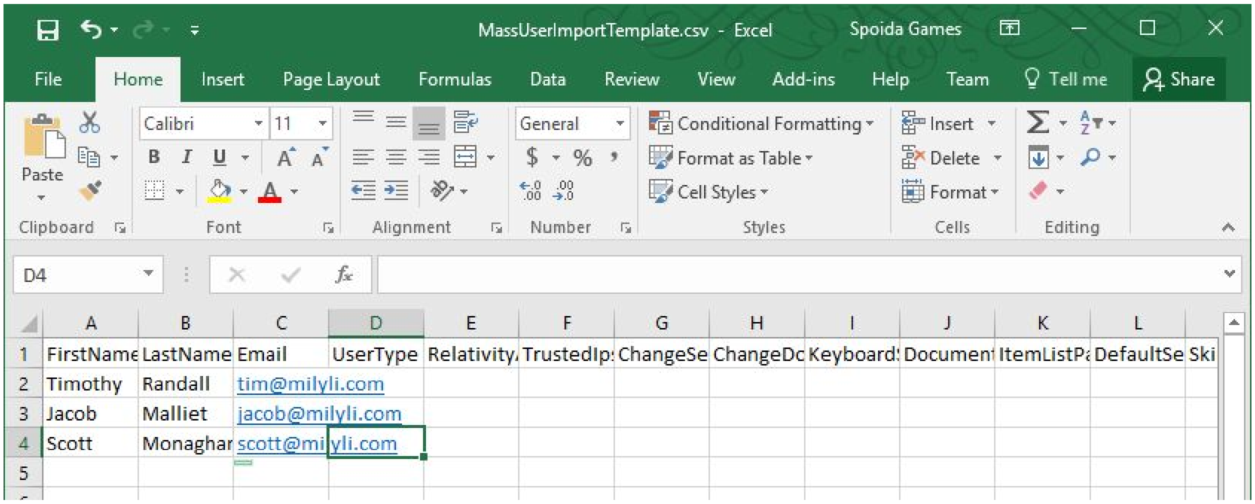
Mass import users is a new feature in Delegate 2.3 that allows client administrators to import and create multiple users at once from a CSV file.

The new feature, if it is enabled on the Delegate Profile, is available on the Users sub tab of the Client Administration tab.

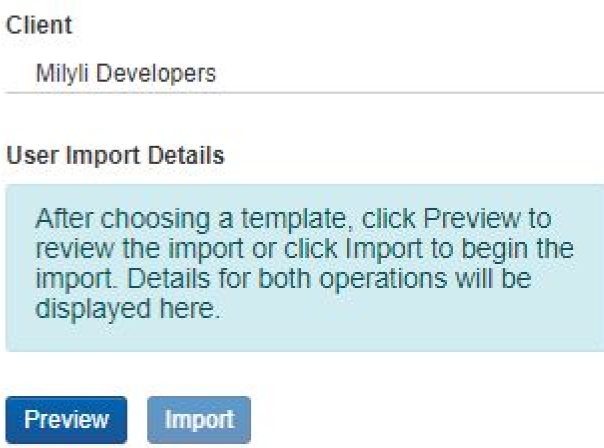
1. Click the Mass Import Users button
2. Download the CSV import template
    a. The link is provided on the Mass User Import form



3. Input the values into the fields for the users you want to import

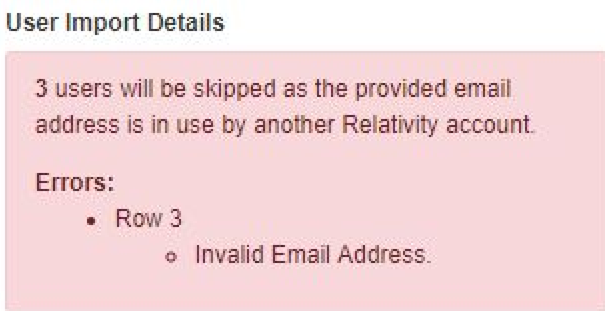


4. Save the file and ensure that it retains the '.csv' format
    a. Do not save it as an Excel file as it will no longer work!
5. Click the Preview link to validate the format and values you input for the users to import

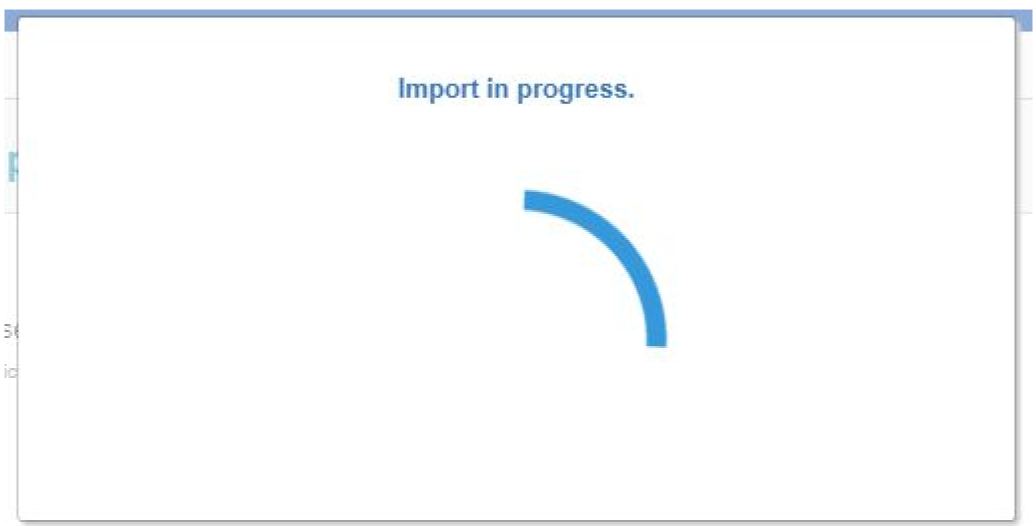


6. A message will be displayed indicating if the document is formed properly or not

7. If there are any issues, they will be displayed here along with the line number where the issue is encountered



8. If everything looks good, click import to create users

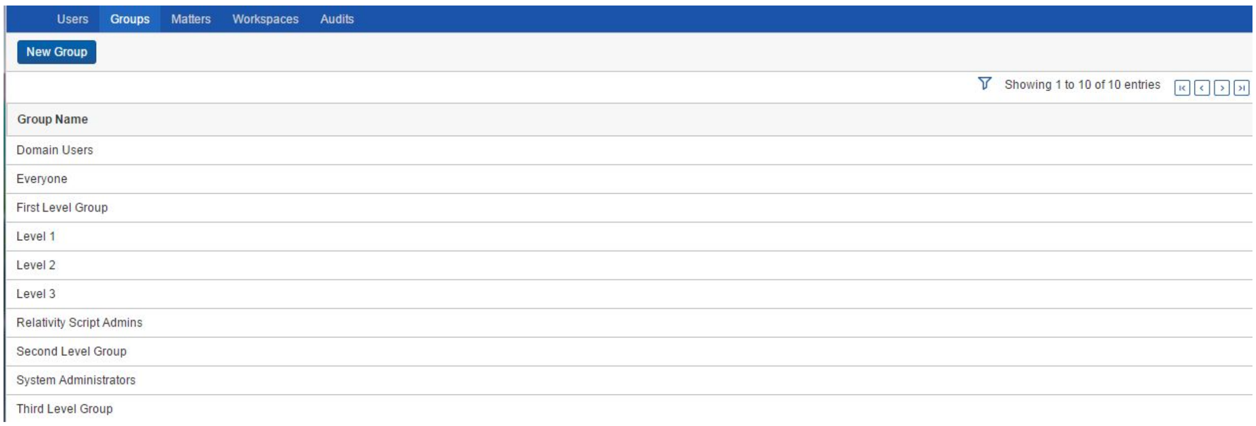


Auto Invite
If the Default Password Provider is used for the newly created users, the Invitation Workflow will be kicked off automatically.

Auto Templates
If a Template User is configured for the client users are being imported into, any field that is not input into the csv will automatically be populated from the template user. If no essential fields are not set in the csv and not template user is configured, the default values for user creation will be used instead.

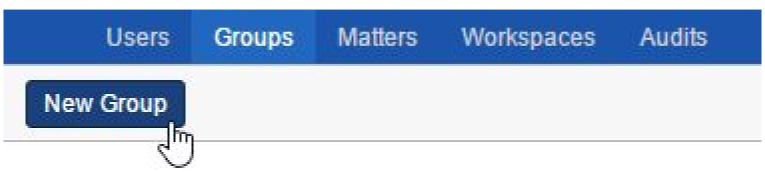
3.4 Group Tab

The next tab is Groups, where you are shown a list of groups associated with the client and can easily add, edit, and delete groups. The list is sortable, filterable (with typeahead functionality), and pageable.



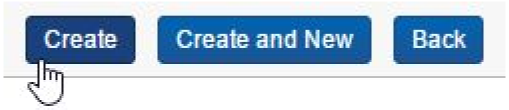
Create Groups

To add a new group, click the **New Group** button.



Type a name for the new group into the **Name** field. ***Note:*** Unlike creating groups in Relativity, the client associated with the group is automatically set to your client.

When you are finished filling out group details, click Create to save the new group. To immediately create another group, click Create and New. To return to the list of groups, click Back.



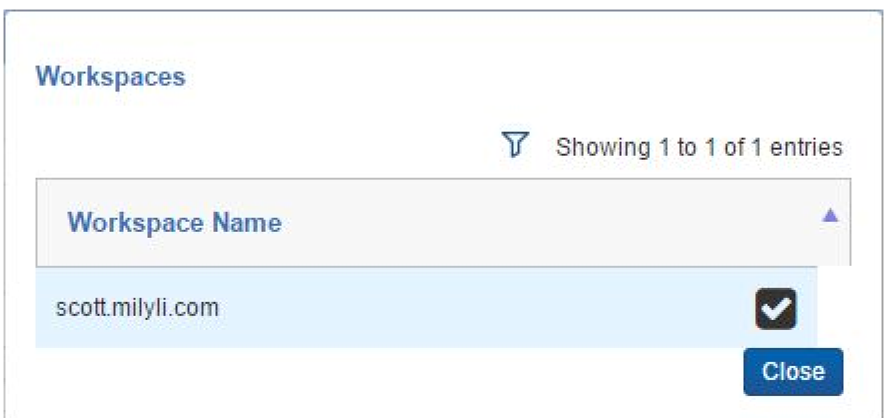
Add Workspace to Group

Groups can be added to workspaces using Delegate either from the group details screen or from the workspace details screen.

Add a Group to a Workspace from the Group Details Screen

To add a Relativity group to a workspace from the group details screen, either click on the row of an existing group in the groups list or add a new group, then scroll to the **Workspaces** section at the bottom of the group details screen. Click **Edit**. Groups can be added to workspaces when groups are created or after the fact.

The Workspaces modal window will be populated with all groups associated with your client.



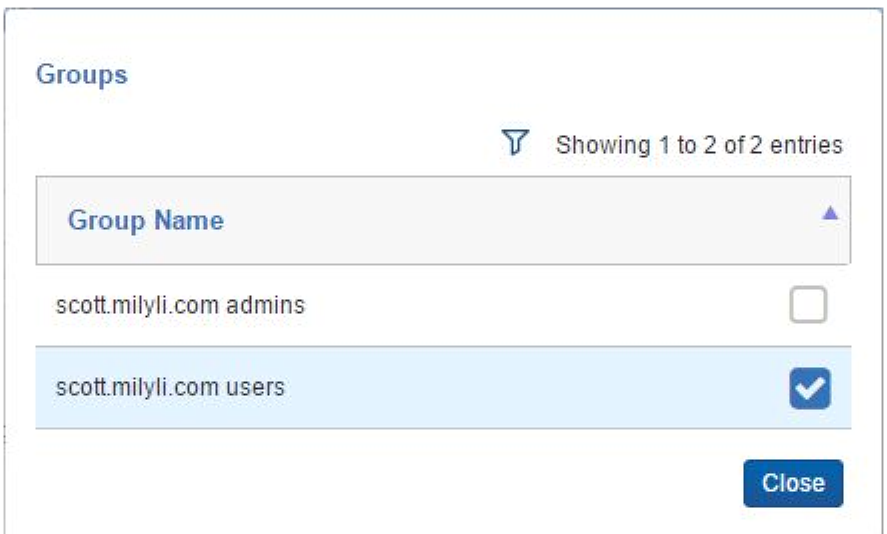
Check the box next to the workspaces(s) you would like to add the group to, then click Close.

Click Save in order to add the group to the workspace(s).

Add a Group to a Workspace from the Workspace Details Screen

To add a Relativity group to a workspace from the workspace details screen, either click on the row of an existing workspace in the workspaces list or add a new workspace, then scroll to the Groups section at the bottom of the Workspace details screen. Click Edit. Groups can be added to workspaces while the workspaces are being created or after the fact.

The Groups modal window will be populated with all groups associated with your client.

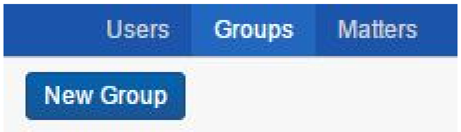


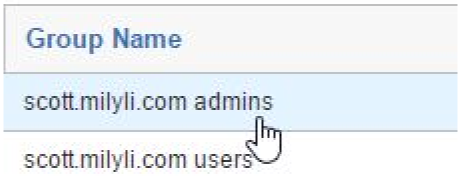
Check the box next to the group(s) you would like to add to the workspace, then click Close.

Click Save in order to add the selected group(s) to the workspace.

Edit Group

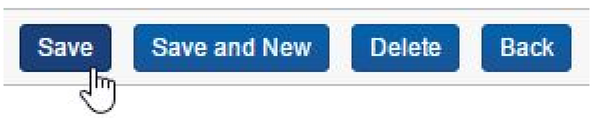
To edit a group, click anywhere in the row for the particular group you want to edit.





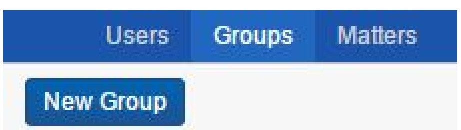
You can edit the Name, Users, and/or Workspaces of the group.

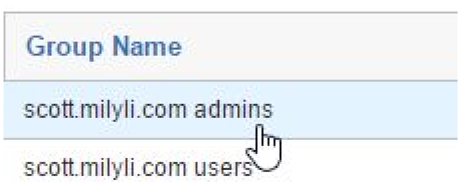
When you are finished editing the group details, click Save to save the group. To immediately create another group, click Save and New. To return to the list of groups, click Back.



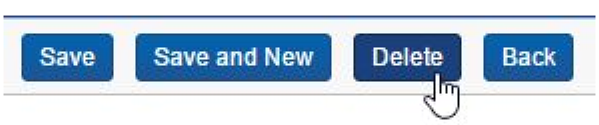
Delete Group

To delete a group, click anywhere in the row for the particular group you want to delete.





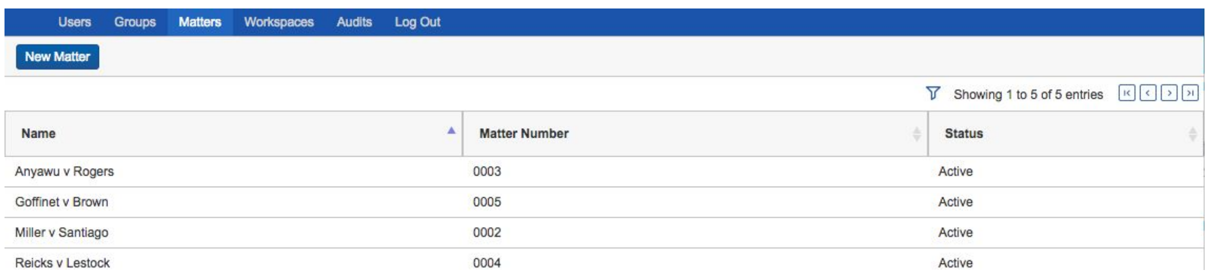
Click Delete.



A modal dialog will then pop up to ask you to confirm that you wish to delete the group. Hit Confirm to delete the group or Cancel if you do not wish to delete the group.

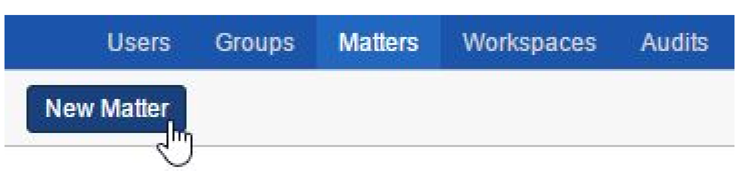
3.5 Matter Tab

The next tab is Matters, where you are shown a list of matters associated with your client and can easily add, edit, and delete matters. The list includes three columns: Name (e.g. Salt v. Pepper), Matter Number, and Status. The list is sortable, filterable (with typeahead functionality), and pageable.



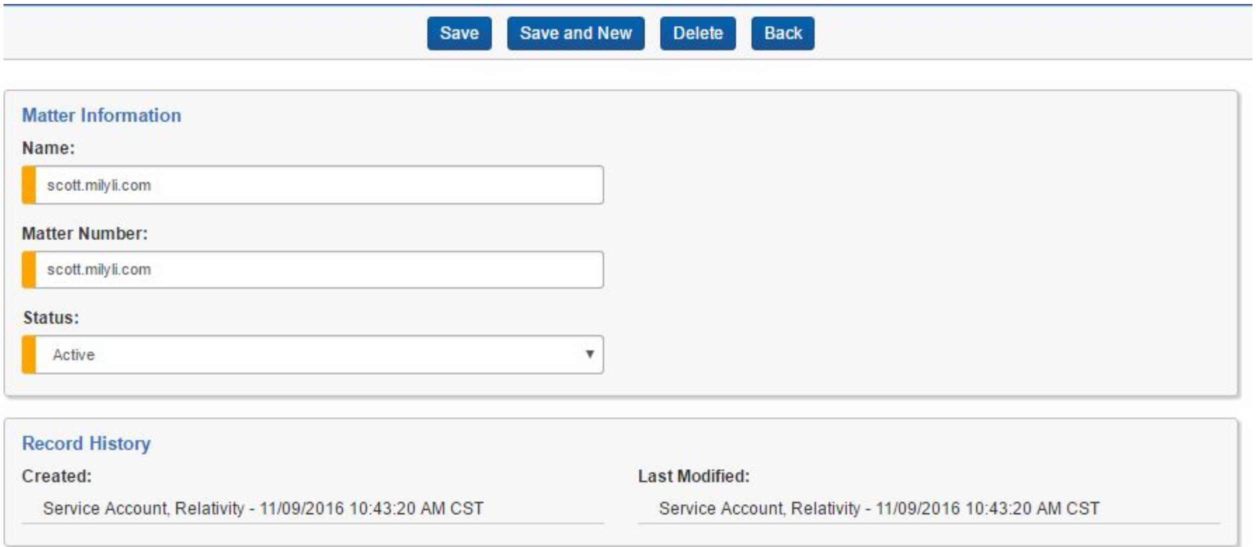
Create Matter

To add a new matter, click the New Matter button.



To create a new matter, fill out the following fields:

- Name: The matter's name; must be between 1 and 50 characters
- Matter Number: A unique number used to identify the matter
- Status: The matter's current status - either Active or Inactive
    - *Note:* The dropdown will be populated with available statuses; contact your Delegate System Administrator if you are not seeing appropriate statuses.

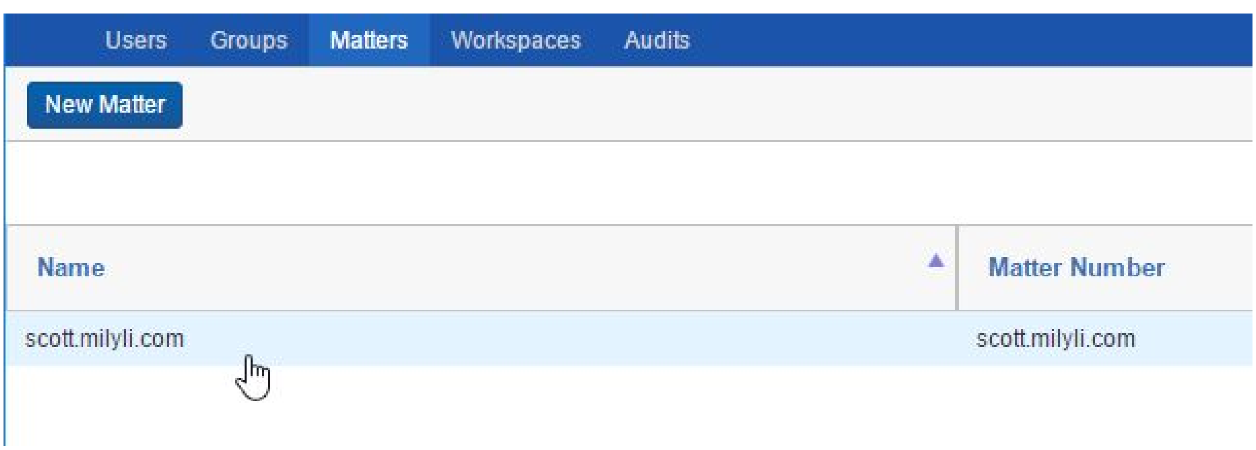


For more information on Relativity matters, review the following Relativity documentation: https://help.kcura.com/9.5/Content/Relativity/Matters.htm

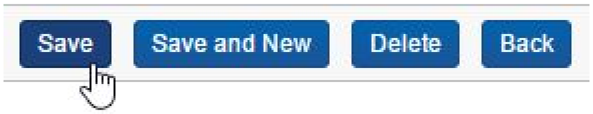
When you are finished filling out matter details, click Create to save the new matter. To immediately create another matter, click Create and New. To return to the list of matters, click Back.

Edit Matter

To edit a matter, click anywhere in the row for the particular matter you want to edit.

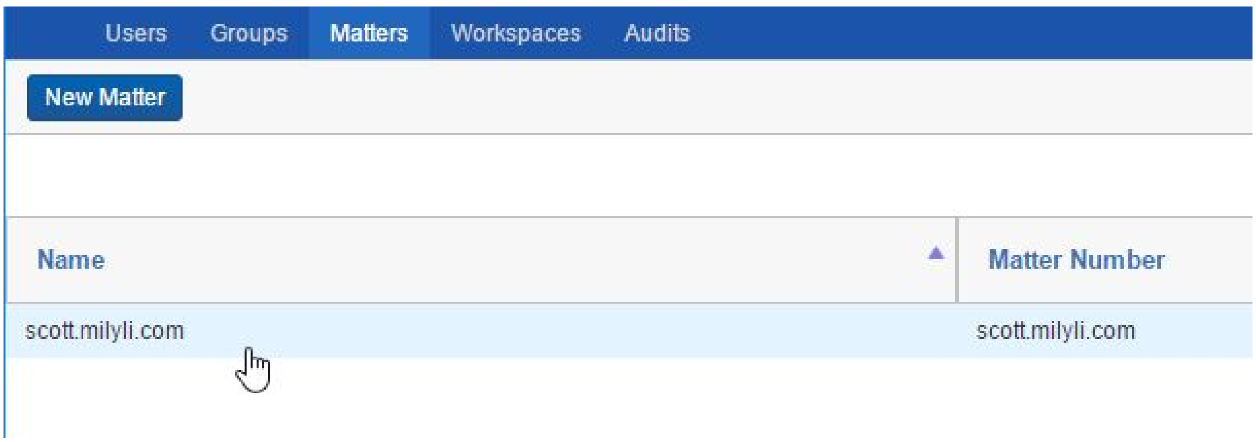


When you are finished editing the matter details, click Save to save the matter. To immediately create another matter, click Save and New. To return to the list of matters, click Back.

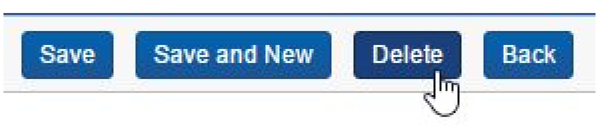


Delete Matter

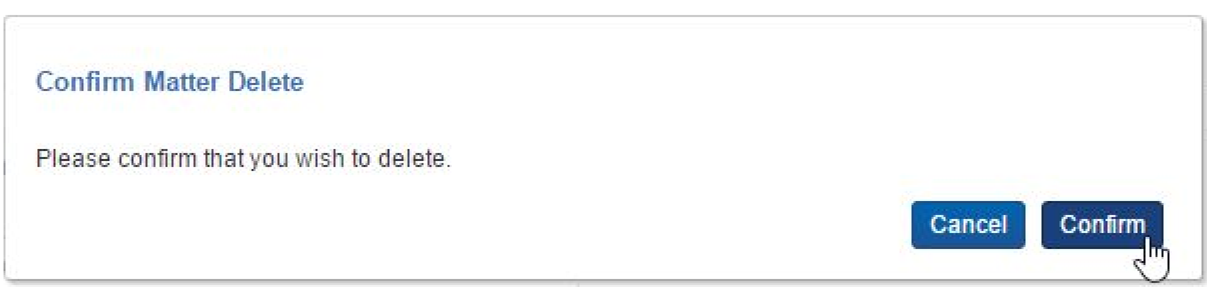
To delete a matter, click anywhere in the row for the particular group you want to delete.



Click Delete.

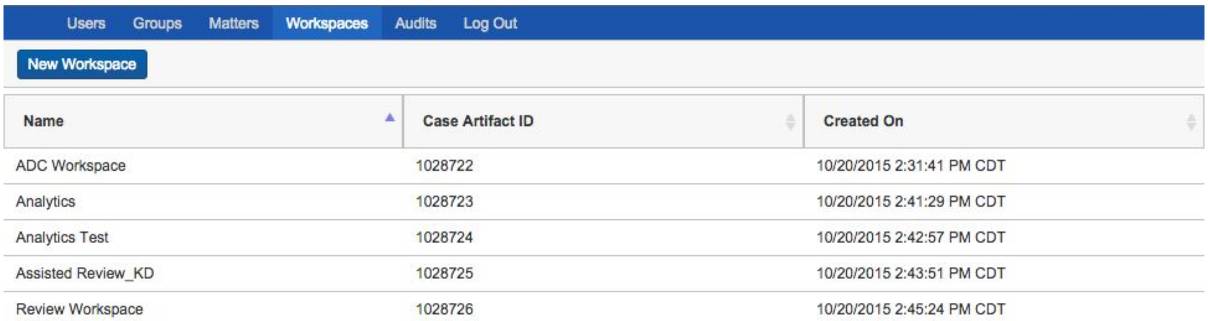


A modal dialog will then pop up asking you to confirm that you wish to delete the matter. Hit Confirm to delete the matter, or Cancel if you do not wish to delete the matter.



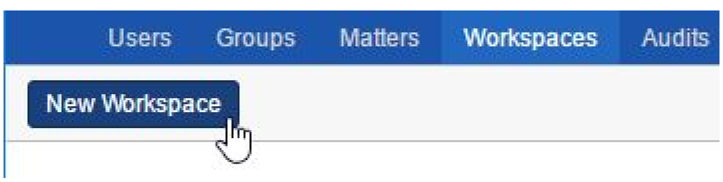
3.6 Workspace Tab

The next tab is Workspaces, where you are shown a list of workspaces associated with your client and can easily add, edit, and delete workspaces. The list includes three columns: Name (e.g. Salt v. Pepper), Case Artifact ID, and Created On (the date the workspace was created). The list is sortable, filterable (with typeahead functionality), and pageable.



Create Workspace

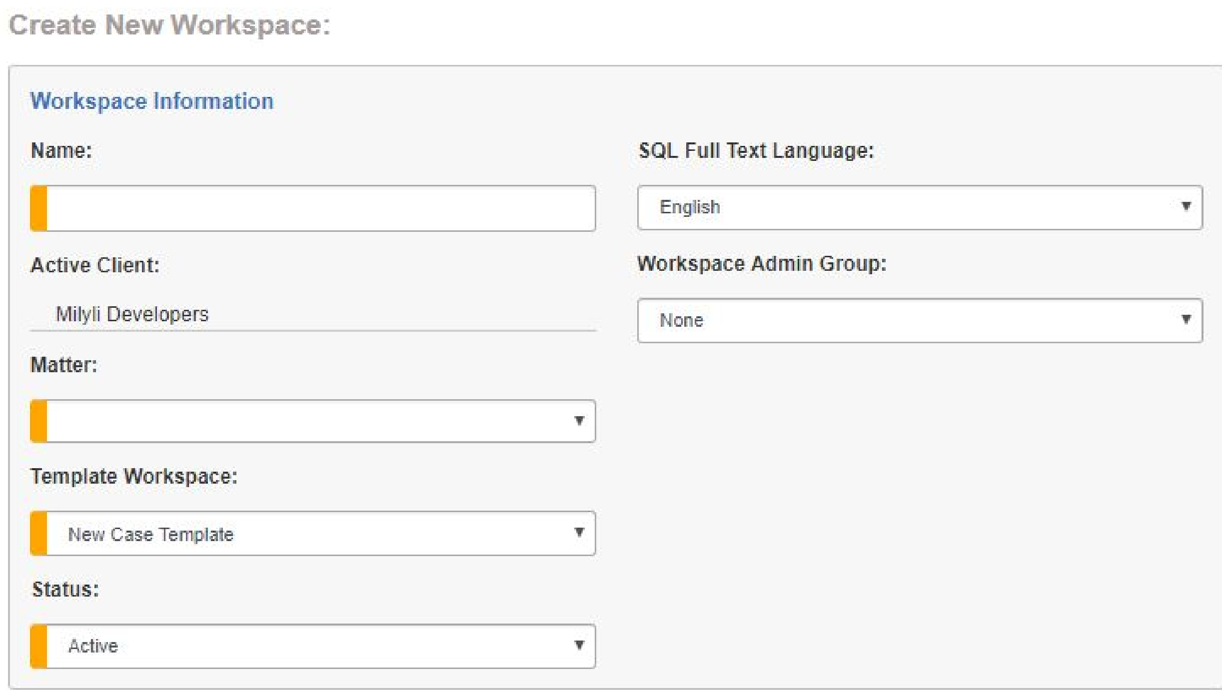
To add a new workspace, click the New Workspace button.



Add workspace details in the Workspace Information section, which includes the following fields:

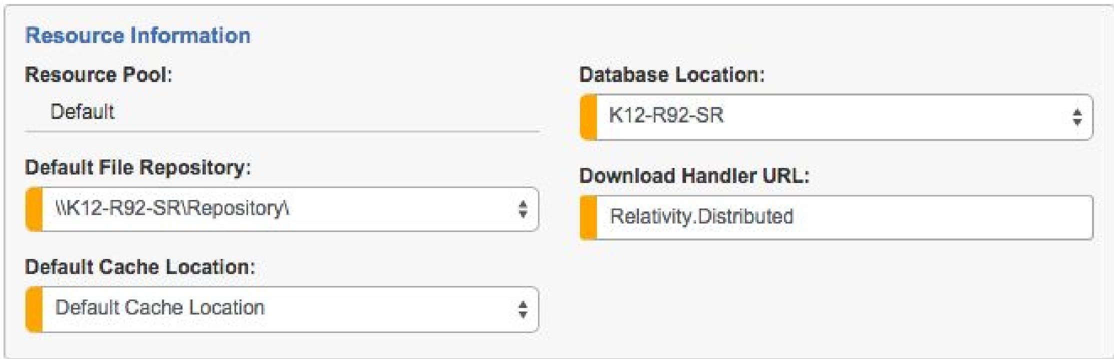
- Name: The name of the workspace that will be displayed in the list of workspaces
- Matter: The matter associated with the workspace; the dropdown list will include the list of matters configured in the Matters tab
- Template Workspace: This dropdown list will include templates configured for you by the Delegate System Admin
- Status: The workspace's status, which should be active if you would like this workspace to show up in your workspaces list
- SQL Full Text Language: Determines the correct stemming and word-break characters used in the full text index, which then allows for keyword searching and filtering in the selected language
    - o This is the only field that is not required
- Workspace Admin Group: Determines the group that has workspace admin permissions over this workspace

Workspace Admin Groups
Setting this field as of Delegate 2.0 is the same as setting it through the built in Relativity Workspace Admin Group.



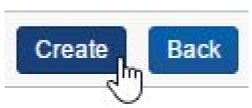
If your Delegate System Administrator has given you ability to select hardware, you'll have additional options here. For more information, contact your hosting provider.

Safe Editing
You will not be able to edit resource information - other than the Download Handler URL - after the workspace has been created.



For more information on how to fill out the fields when creating or editing a workspace, review the following Relativity documentation on workspaces:
http://help.kcura.com/9.5/#Relativity/Workspaces/Workspaces.htm#Creating

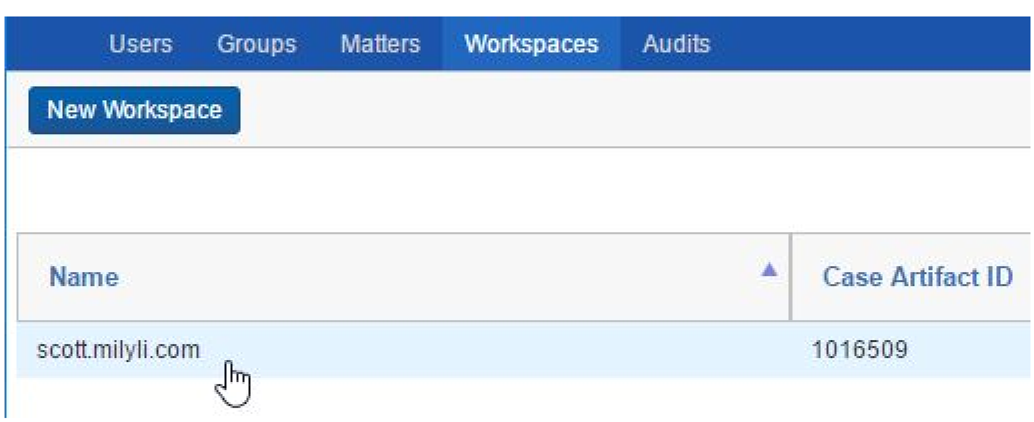
When you are finished filling out workspace details, or if you want to save your progress and continue editing, hit Create. To return to the list of workspaces, click Back.



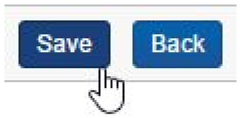
Deleting Workspaces
You cannot delete a workspace with Delegate. Contact your hosting provider if you would like to take a workspace offline.

Edit Workspace

To edit a workspace, click anywhere in the row for the particular workspace you want to edit.



Edit the Workspace and Resource Information fields as needed, then hit Save to save your changes and Back to return to the users list.



4. Audits

Audits have been overhauled in Delegate 2.0 to include more information about each piece of information that has changed. Delegate shows what object was modified, the fields that were modified, the original value, and the new value.

Objects that are tracked include Users, Groups, Matters, and Workspaces. Additional actions that are include include adding users to groups and groups to workspaces.

Audits are split into two areas depending on which Audit tab is being viewed. When viewing the audit tab from the System Admin Delegate tab, all audit events across the entire system are available to be filtered through. Additionally, the active client for each audit is immediately available on the table.

When viewing the audit tab from the Client Administrator tab only the audits for the active client will be visible. Changing the active client will automatically update the table.

Show 20 Showing 1 to 14 of 14 entries

Action	Name	Type	Id	User	Timestamp
Update	Randall, Jeremy	User	1055106	Errea, Lissa	10/30/2017 7:21:41 PM
Update	Everyone	Group	1015005	Errea, Lissa	10/30/2017 7:21:40 PM
Create	Randall, Jeremy	User	1055106	Errea, Lissa	10/30/2017 7:21:40 PM
Update	Randall, Jerry	User	1055103	Errea, Lissa	10/30/2017 7:21:27 PM
Update	Everyone	Group	1015005	Errea, Lissa	10/30/2017 7:21:26 PM
Create	Randall, Jerry	User	1055103	Errea, Lissa	10/30/2017 7:21:26 PM
Update	Everyone	Group	1015005	Errea, Lissa	10/30/2017 7:21:16 PM

Clicking on any of these audits will expand on the details of the change.

The Change Log
Delegate attempts to track all of the details of every field that is modified in an update event. Both the previous value and the new value will be displayed.

Audit Information

Client: Milyli Developers

ID: 1055103

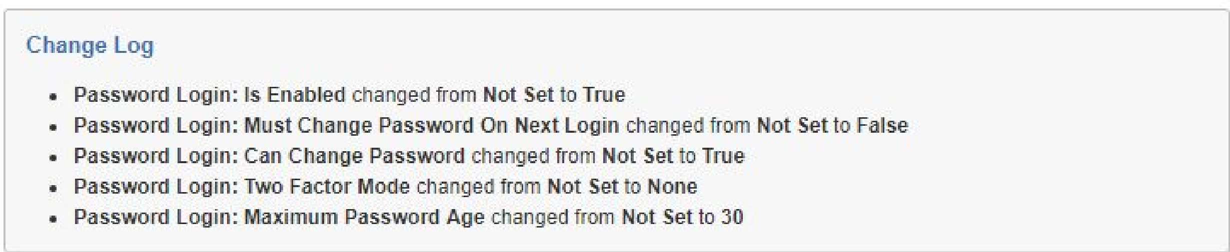
Name: Randall, Jerry

User: Errea, Lissa

Action: Update

Timestamp: 10/30/2017 7:21:27 PM

Type: User



Change Log

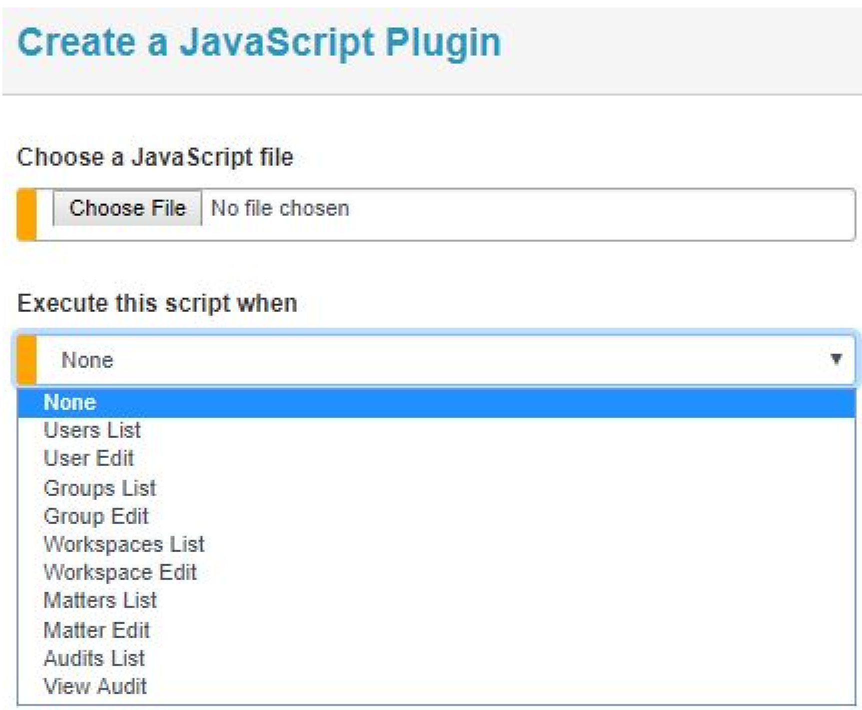
- **Password Login: Is Enabled** changed from **Not Set** to **True**
- **Password Login: Must Change Password On Next Login** changed from **Not Set** to **False**
- **Password Login: Can Change Password** changed from **Not Set** to **True**
- **Password Login: Two Factor Mode** changed from **Not Set** to **None**
- **Password Login: Maximum Password Age** changed from **Not Set** to **30**

5. Plugins

Advanced User Warning
Delegate plugins are an advanced feature intended for organization developers or Milyli to implement custom code that may not make sense to roll out to all Delegate customers. This section does not detail how to create and implement plugins but is intended to provide a high level overview of what the feature is intended for.

Delegate 2.3 introduces advanced functionality that provides the ability to further customize the system. Behind the scenes, Delegate fires several JavaScript events for different actions such as when the users are listed, created or edited. The plugins functionality allows for custom JavaScript to be executed that consumes these events.

The available events to be consumed are listed below.



When to Use

Plugins provide the ability to add additional customization to the system when it's needed. An example of this would be the restriction of certain fields on a form. For example, if your organization uses the Status field on the matters form for internal purposes, a Delegate plugin can be created that will remove this field from the Matter create and edit form effectively preventing the modification and viewing of the field.

There is a wide range of application for plugins. To learn more about implementing them or to see about getting a custom plugin developed for your organization, please contact support@milyli.com.

a **milyli** product

About Milyli

Milyli is an e-discovery software development firm with a broad range of experience developing products from the ground up, as well as customizing systems on kCura's Relativity software and Microsoft platforms.

Other Products

We've worked with a wide range of organizations to solve their unique business problems over the years, which gave us insight into common issues faced by different industries. We've used that expertise to develop products to address those business painpoints and streamline your workflows right out of the box.

Blackout
Automated Redaction Tool

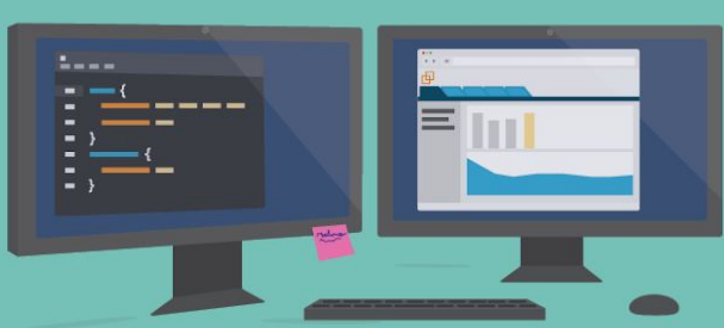
Blackout is a redaction tool for Relativity that automatically redacts - or highlights! - words, phrases, and common patterns (SSNs, account numbers, emails, etc.) in your document set. Blackout keeps sensitive data and PII from falling through the cracks, while also significantly reducing the cost and turnaround time of the review.

Broadcast
Dashboard Reporting Tool

Broadcast is an ediscovery reporting tool that makes it easier to report on important Relativity data - like billing or reviewer statistics - across workspaces, clients, and even systems. Generate charts and graphs to display information for your stakeholders, internal teams, and clients on Broadcast's fully-customizable dashboards.

Relay
Data Transfer Tool

Relay is a Relativity data transfer tool that cuts out the middleman when you need to import or export case data. Choose which databases or processing engines you want to transfer data from, then transfer directly to or from Relativity, without exporting and importing load files with the Relativity Desktop Client.



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