DELEGATE

USER GUIDE

Version 3.3

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1. Installing and Upgrading

1.1 System Requirements

Delegate 3.0 takes advantage of a range of API's, functionality, and resources across the Relativity platform. The following requirements must be met to take advantage of the different functionality available in Delegate 3.0.

- Relativity Server 2021
- Relativity Server 2022

Automated Workflows Requirements:

- Run Search Term Report step is only available on Relativity Server 2022

- Populate, Build, and Activate Analytics Index step is only available if an Analytics Server is properly set up, licensed, and configured. In addition, Analytics Relativity Application must be installed in the workspace where the automated workflow is being created.

- Run Structured Analytics Set step is only available if an Analytics Server is properly set up, licensed, and configured. In addition, the Structured Analytics Relativity Application must be installed in the workspace where the automated workflow is being created.

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.

1.3 Agent Setup

Delegate 3.0 adds a new Delegate agent that is used to manage the automated workflow process. The agent starts workflows, checks step status, and sends notifications. The agent only

does work so long as there are tasks to execute.

Note: It is strongly recommended to create a single Delegate agent. In Relativity Server 2021, Relativity scripts are executed from the Delegate agent. Therefore, it is recommended to choose an agent server where other agent operations don't regularly utilize all available agent resources.

1. Navigate to the agent tab.
2. Select **New Agent**
3. Select the **Delegate Workflow Agent** for the agent type.
4. Keep number of agents at 1
5. Select your preferred agent server.
6. Leave the logging level and run interval at the default values.
7. Click **Save** to create the agent.

1.4 Applying a License

After successfully installing Delegate, a license request must be generated to retrieve a valid license from Milyli.

1. Navigate to the **Delegate | Delegate Settings** tab in the Relativity admin section.
2. Click on **Generate License Request**.
3. Click **Copy to Clipboard**.
4. Submit the license request body to support@milyli.com.
5. Milyli will supply a license key in response.
6. Click on **Apply new License**.
7. Paste the license key in the box and click **Save**.

1.5 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.**

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 tomanage 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 the 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. Upon accessing this tab, you will see a list of existing Delegate profiles along with their details.

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 tocontrol 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 can 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 option 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.

Tab Permissions

Delegate profiles provides extensive permission customizations. Each client administration tabcan 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 doso.

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 clientadministrators 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 auser to instead utilize the mass import form.

Creating Self Managing Delegate Profile

The Delegate Configuration tab allows members of that group to autonomously manage their own client. For new installations, follow these steps to replicate 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."**
   - 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. This is where you can prevent client admins from getting access to features thatyou 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 showsa 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 changedvalue 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:	**ID:**
Milyli	9
Name:	**User:**
Delegate Profile - Milyli Project Managers	Randall, Tim
Action:	**Timestamp:**
Delete	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 beginusing Delegate client administration. However, before they can begin creating users, the clientsthat 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 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 many 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 providesstrong 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 templateuser, 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" authenticationprovider, 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.

Enable Them Later
By leaving this field unchecked and checking the enable restriction on theDelegate 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 beconfigured 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 to ensure that members of that group will be able toaccess the Client Administration tab.

> This group has not been given permission to access the Client Administrator tab. To setup these permissions follow the instructions found here or reach out to support@milyli.com for assistance.

To configure access for the group, follow these steps:

1. Navigate to the Relativity Admin workspace.
2. Click the **Instance Details** tab.
3. Click **Manage Permissions**.
4. Click **Add/Remove Groups** and select the group that you selected in the Delegate Profile you created.
5. Click **Edit Permissions** for the group that you just added.
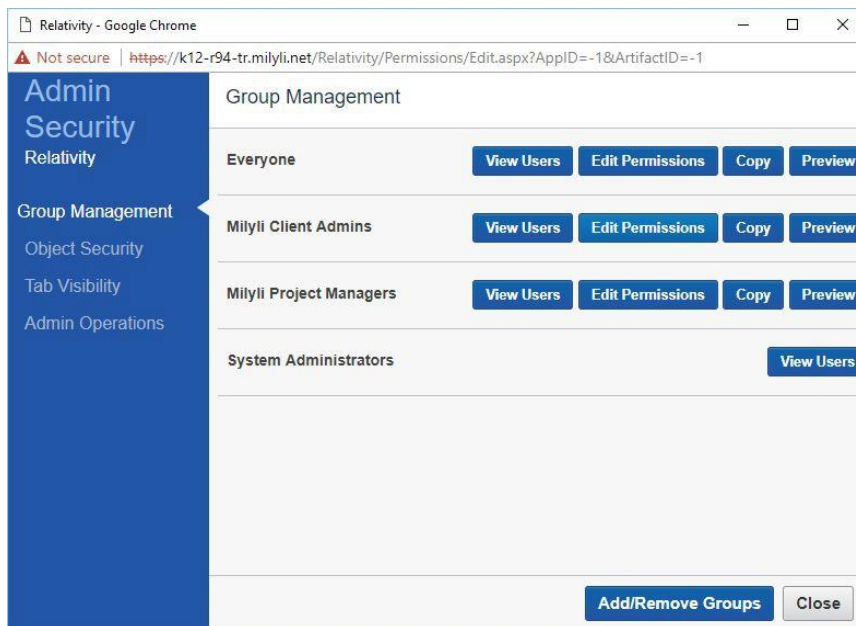
6. Click on the **Tab Visibility** navigation button in the left menu.
7. Select the **Workspaces** tab and the **Client Administration** tab.
8. Click **Save**.
9. Click on the **Admin Operations** navigation button in the left menu.
10. Select the **View Admin Repository** admin operation.
    -
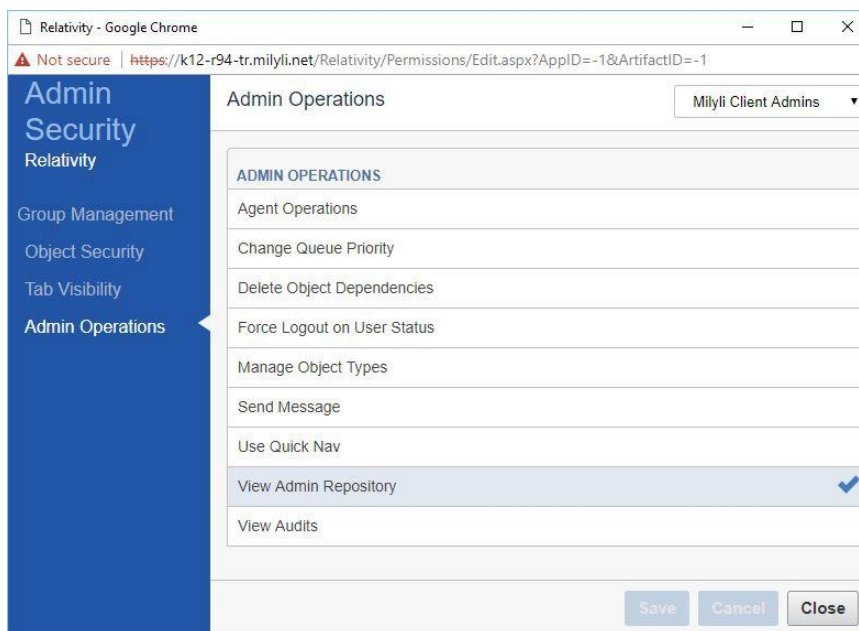
11. Click **Save**.

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.

Client Administration

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 willdepend on the profiles you are a member of and the permissions they have been granted.

Users   Groups   Matters   Workspaces   Audits

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.

Client Administration ☰

Milyli Developers ▼

Milyli Developers
Milyli Support
Milyli Marketing
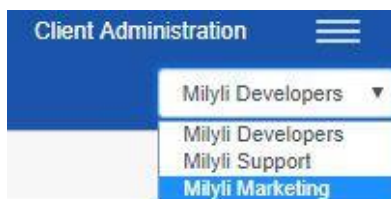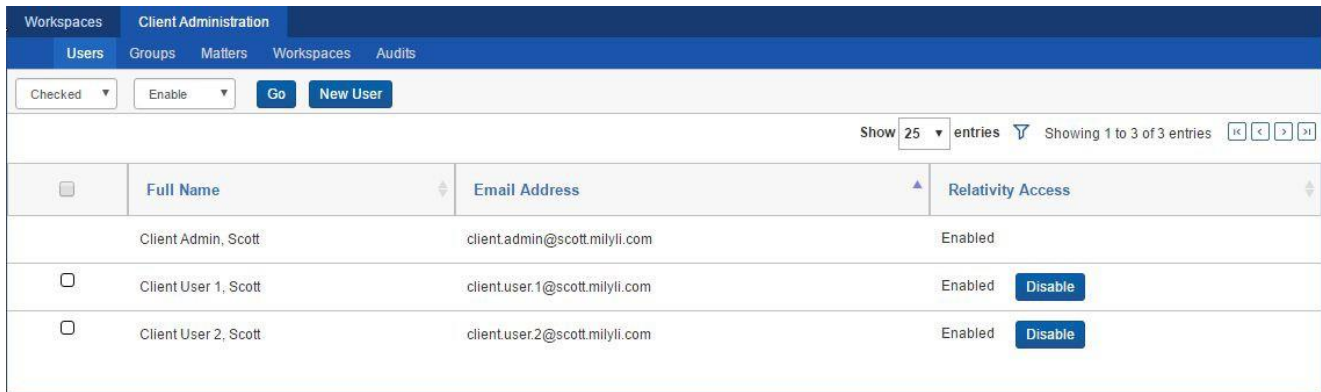
Selecting any client from this dropdown will switch the active client. Any action performed

as a client administrator will be performed against the active client. Helper fields are provided on allforms 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 users associated with the current client. From here you choose to manage or create users.
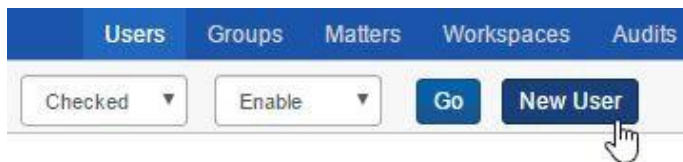

Add New Users

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 the fields and default values available when adding or editing a user in Relativity. For more information on how to fillout the fields when creating or editing a user, review the Relativity documentation on users **here**.

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 yourprofile and that template user has the default password provider as its template, it will automatically be selected and configured for you.
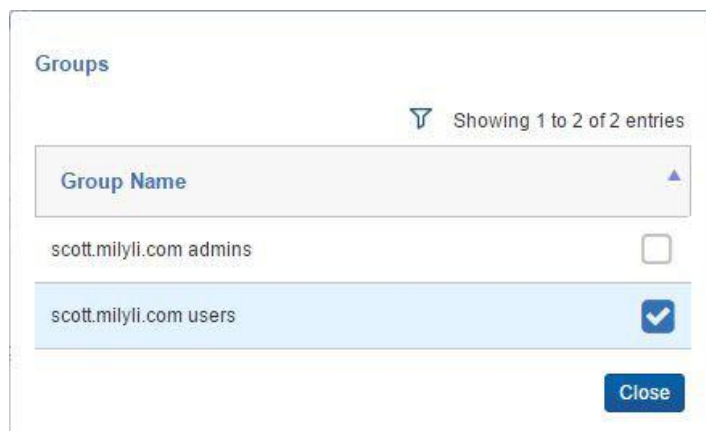
Add User to Group

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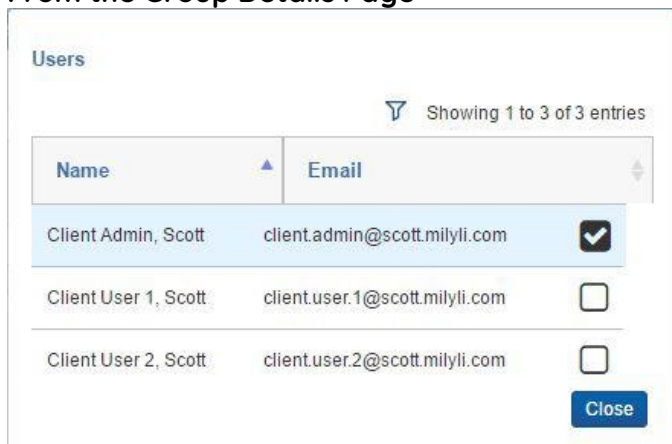
From the User Details Page

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

anexisting 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 **here**.

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 3.3 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.

   • Specify the scope of mass enable/disable to Checked, These (filtered users on the current page), or All (filtered users on all pages).
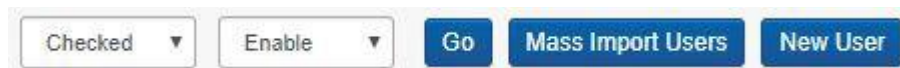
3. Select Enable or Disable from the dropdown.
4. Click Go.

Mass Import Users

Mass import users allows client administrators to import and create multiple users at once from a CSV file.

If it is enabled on the Delegate Profile, navigate to the Users sub tab of the Client Administration tab.

1. Click the Mass Import Users button.
2. Download the CSV import template.
   - 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.
   - Do not save it as an Excel file as it will no longer work!

   -

- Click the Preview link to validate the format and values you input for the users to import.

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

User Import Details

3 users will be skipped as the provided email address is in use by another Relativity account.

Preview succesful! Please see the full details below.

Ok

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

User Import Details

3 users will be skipped as the provided email address is in use by another Relativity account.

Errors:
- Row 3
  - Invalid Email Address.

5. If everything looks good, click import to create the users.

Auto Invite

If the Default Password Provider is used for the newly created users, theInvitation 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 thetemplate 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** 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 to add the selected group(s) to the workspace.

Edit Group

To edit a group, click anywhere in the row for the 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 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.
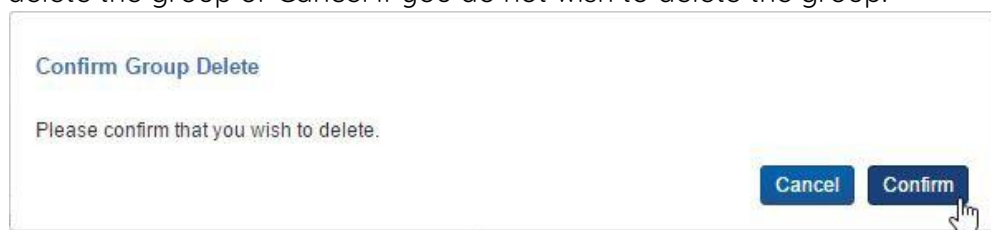
3.5 Matter Tab

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 status - either Active or Inactive
    - o *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 Relativity documentation **here**.

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 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 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.
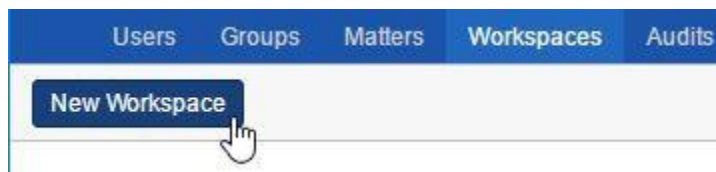
3.6 Workspace Tab

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.

Users Groups Matters **Workspaces** Audits Log Out		
New Workspace		
Name ▲	**Case Artifact ID** ⇕	**Created On** ⇕
ADC Workspace	1028722	10/20/2015 2:31:41 PM CDT
Analytics	1028723	10/20/2015 2:41:29 PM CDT
Analytics Test	1028724	10/20/2015 2:42:57 PM CDT
Assisted Review_KD	1028725	10/20/2015 2:43:51 PM CDT
Review Workspace	1028726	10/20/2015 2:45:24 PM CDT

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 charactersused 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 is the same as setting it through the builtin Relativity Workspace Admin Group.

If your Delegate System Administrator has given you the 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 DownloadHandler 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 Relativity documentation on workspaces **here**.

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 providerif you would like to take a workspace offline.

Edit Workspace

To edit a workspace, click anywhere in the row for the 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. Automated Workflows

Automated Workflows Requirements:

- Run Search Term Report step is only available on Relativity Server 2022

- Populate, Build, and Activate Analytics Index step is only available if an Analytics Server is properly set up, licensed, and configured. In addition, Analytics Relativity Application must be installed in the workspace where the automated workflow is being created.

- Run Structured Analytics Set step is only available if an Analytics Server is properly set up, licensed, and configured. In addition, the Structured Analytics Relativity Application must be installed in the workspace where the automated workflow is being created.

4.1 Global Settings

Delegate has global configuration settings for default email addresses for notifications in automated workflows. This provides a straightforward way to quickly define the email addresses that will be included in all automated workflows by

default.

To configure these email addresses, follow these steps:
1. Navigate to Admin > Delegate Settings tab.
2. Enter valid emails in the global defaults section.
3. Click on Save Emails

- **Workflow Complete Notification**: A notification will be sent upon the completion of a workflow.
- **Step Failure Notification**: An optional notification that is sent when a step fails or has partially completed.
- **Step Complete Notification**: An optional notification that is sent when a step runs successfully.

4.2 Permissions

Delegate 3.0 evaluates two permissions when working with automated workflows.

By default, when installed into a workspace, the Delegate > Automated Workflows tab is only available to System Administrators. To allow other groups to access Automated Workflows, they should be granted tab permissions via Workspace Details > Manage Workspace Permissions.
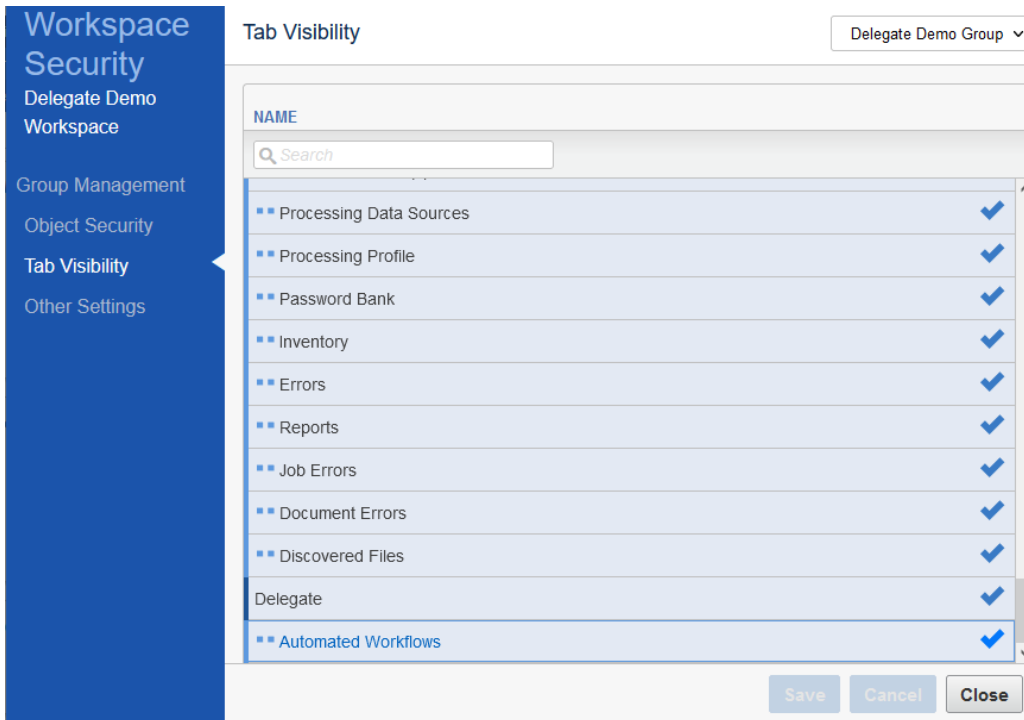
Granting a group access to the Automated Workflow tab grants users of that group the ability to create and run automated workflows.

If a user is viewing a workflow that was created by someone else with an Execute Relativity Script step configured with a Relativity script the viewing user does not have access to, the user may change that step to a different script but will not be able to change it back.

4.3 Creating a Workflow

To get started, navigate to the Automated Workflows tab in a workspace where Delegate has been installed.

Click **New Workflow**.

Name: Name used to Identify the workflow
Description: Explanation of the Workflow
Emails to Notify on Workflow Complete: Email addresses that will be notified when this workflow completes.
Default Emails to Notify on Step Failure: Email Addresses that will be notified if a step fails of a step partial completes.
Default Emails to Notify on Step Complete: Email Addresses that will be notified when a step completes.

Workflows are comprised of one or more steps that are executed sequentially when run. These steps represent the selection, and in some cases, the options that are used to run an existing Relativity resource.

Any number of steps can be added to a workflow and configured to run in any desired order. Steps are added to the bottom of the workflow and can be rearranged as needed. There are no restrictions on rearranging steps between successful workflow runs.

Trigger: Manual, Scheduled, or Recurring

This trigger allows a user to define when an automation is run. The trigger type can be set to Manual, Weekly Recurring, Daily Recurring, or Scheduled.

What to Know
- When executing a Recurring or Scheduled Trigger the user must select a date and time of day that are in the future. This time will be chosen in a UTC format and a message will be shown to the user indicating the selected date and time of day represented in the local time zone when the workflow will run.
- The user must also choose if the workflow will automatically trigger on the configured settings by checking the Active option. If this is left unchecked the workflow will be disabled from automatically executing.

Manual
Manual is the default setting for workflows. When this option is chosen the execution can only be initiated by clicking the Run button.

Scheduled
Users can schedule a workflow to run once at a specific date and time in the future using the Scheduled trigger type.

Recurring

Users can schedule a workflow to run daily, weekly, or monthly by selecting the Recurring trigger type.

Daily	
	Users can schedule a workflow to run daily by selecting the Recurring trigger type with a Recurrence Pattern of Daily.
Weekly	
	Users can schedule a workflow to run weekly by selecting the recurring trigger type with a recurrence pattern of weekly and select the day of the week they want the automation to run.
Monthly	

Users can schedule a workflow to run monthly by selecting the recurring trigger type with a recurrence pattern of monthly. When choosing this option you will be prompted to choose what part of the month you want the recurrence to run.

Trigger: New Documents Loaded

This trigger allows workflows to execute automatically when new Documents are loaded into a workspace.

What to Know

- **Activation**: Initiates when a new document record is created in the database.
- **Exclusions**: Does not trigger for document updates, including changes in metadata or overlaying images, natives, productions, metadata.

During execution, configured workflows with this trigger will check every 5 minutes (by default) to determine if execution is necessary. While a workflow is in progress, the periodic check is temporarily suspended to prevent interruptions.

If the workflow has been executed before, any documents loaded after the last execution are considered new. For workflows that have never been executed, documents loaded after the document load trigger is first configured are treated as new.

An Instance Setting can be configured to set the interval for how long to wait between the last document being loaded and the workflow execution starting.

Name	MinutesElapsedSinceLastDocumentLoaded
Section	Milyli.Delegate
Description	The amount of time, in minutes, a workflow will trigger after a document has been loaded into a workspace with no additional documents loaded within that window.
Initial Value	5

Step Notification and Error Behavior

Every step has individual step configuration for how the workflow behaves. Options are available for determining behavior in the event of steps resource erroring, completing partially, or succeeding. This includes individual options for notifications.

Notification and Error Behavior −

Step Status	Pause Workflow	Notify	Emails to Notify
Completed		☐	steve@milyli.com, tim@milyi.com
Partial Complete	☐	☑	lit-support-team@milyli.com
Error	☑	☑	lit-support-team@milyli.com

Users can choose to pause the workflow in two scenarios. If the Relativity resource fails for any reason and ends in an error, the workflow can be paused. By default, this option is checked. Paused workflows provide several actions that your team can take detailed later in this documentation.

A second pause option is available for partial complete. Partial complete is unique to every Relativity resource. For example, Image Sets are considered partially complete if a handful of documents fail to image. Relativity does not error out the image set in this scenario but continues through the remaining documents. By default, this is unchecked as there is additional nuance to be considered based on your team's requirements.

Finally, the third layer of notification configuration is displayed here. The email notifications at the step level reflect the workflow settings by default. These can be removed or modified on a step-by-step basis. The notification options for error and partial complete are checked by default.

Workflow Complete Step

The workflow Complete step is triggered at the end of every workflow after all steps have completed without pausing the workflow. The complete step does not require all steps to be successful, just that all steps have run.

The workflow complete step is represented by a green step that cannot be moved or removed.

✉ **Workflow Complete Notifications**   »

Emails will be sent to: lit-support-team@milyli.com

The workflow complete notification is optional. Simply clear the "Emails to Notify on Workflow Complete" field and the workflow complete notification will be skipped.

Emails to Notify on Workflow Complete:

e.g. 'email1@domain1.com, email2@domain2.com'

Delay Step

The Delay step is used to delay a set number of seconds before moving on to the next step. When the stopwatch hits the time specified in the step, it will move to the next step. The only input is an integer that represents seconds.
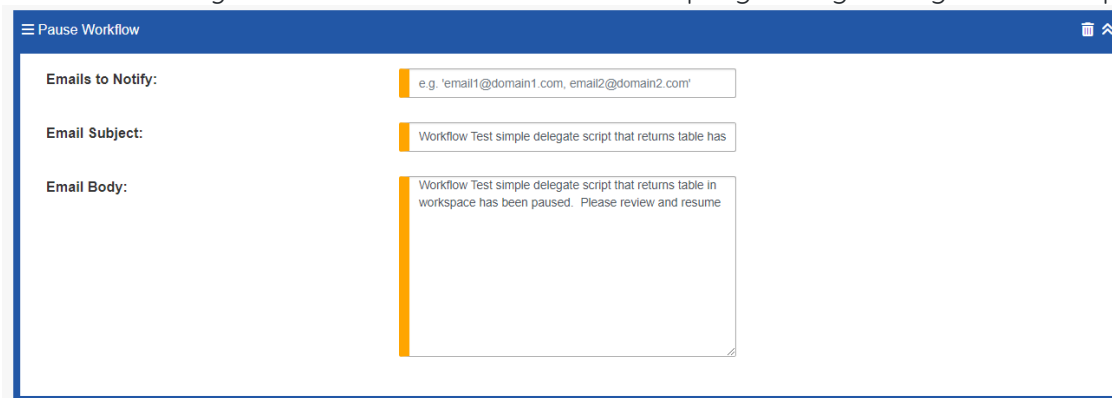
☰ Delay	🗑 ⌃
Seconds To Delay:	(e.g. 5)

Run Relativity Integration Point Step

The Run Relativity Integration Point Step allows users to configure a RIP job to run within a workflow. To enable this, specify the Integration Point you wish to execute. Please note that this step is only available if the Integration Points application is installed.

Pause Workflow Step

The Pause Workflow Step allows users to pause a workflow and notify relevant stakeholders via email. When executed, this step will pause the workflow and trigger the email notification. Users will have to manually resume the workflow to continue progressing through future steps.

☰ Pause Workflow	🗑 ⌃
Emails to Notify:	e.g. 'email1@domain1.com, email2@domain2.com'
Email Subject:	Workflow Test simple delegate script that returns table has
Email Body:	Workflow Test simple delegate script that returns table in workspace has been paused. Please review and resume

Update Field Step

The Update Field Step will calculate the size of a long text field and populate the value to a document field. To use this step define the target documents using a saved search, select the field to be updated, and specify the new value.
Supported field types include:
- Fixed-length text
- Long text
- Date
- Whole number
- Decimal
- Currency

- o Yes/no
- o User
- o Single object
- o Single choice

Update Field

Saved Search:	All Documents
Field:	Date Last Modified	11/14/2023

Notification and Error Behavior

Set Long Text Field Size Step

The Set Long Text Field Size Step will calculate the size of a long text field and populate the value to a document field. Please note to only enter long text for Custom Text Field and only decimal values for the Extracted Text Size Field.

Set Long Text Field Size

Saved Search:	All Documents
Long Text Field:	Custom Text
Decimal Field (KB):	Extracted Text Size

Notification and Error Behavior

Run Imaging Set Step

The Run Imaging Set Step will list a drop to select an Image Set within the Workspace. Upon step execution, the Imaging Set will be run in Relativity. If the imaging queue is full, the Imaging Set will be automatically queued by Relativity and Delegate will continue to wait for the step to run.

The configuration and setup of your relativity instance dictates how this resource will be executed and Delegate provides no way to override the built-in Relativity queuing and load balancing.
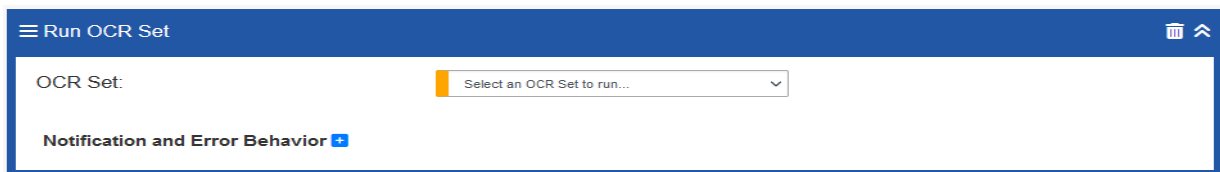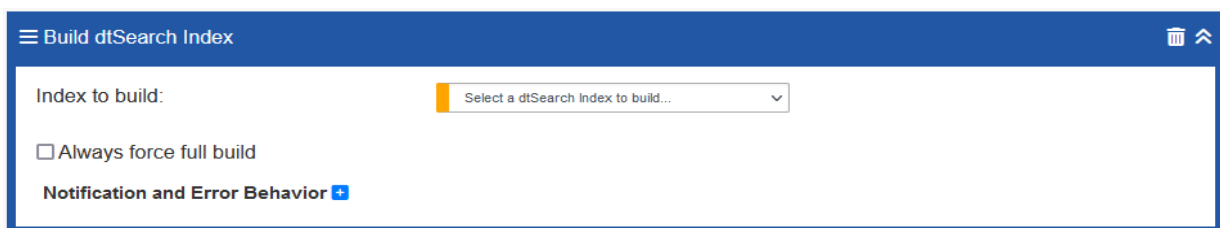
The Run Imaging Set Step gives teams flexibility to include imaging sets and ensure their execution before review starts. This step pairs well with other steps that depend on images existing such as the Run OCR Set Step. The Run Imaging Set Step behaves exactly as if the imaging set was run manually via the Imaging Sets tab in Relativity.

Run Imaging Set

Imaging Set:	Select an Imaging Set to run...

Notification and Error Behavior

Run OCR Set Step

The Run OCR Set Step provides options for selecting an OCR Set within the workspace. Upon step execution, the OCR Set will be run in Relativity. If the OCR queue is full, the OCR Set will be automatically queued by Relativity and Delegate will continue to wait for the step to run.

The configuration and setup of your relativity instance dictates how this resource will be executed and Delegate provides no way to override the built-in Relativity queuing and load balancing.

The Run OCR Set Step gives teams the ability to include OCR Set execution as a part of their workflows. Delegate can run OCR Sets configured for both Data Sources and Productions. The Run OCR Set Step behaves exactly as if the OCR Set was run manually via the OCR Sets tab in Relativity.

Run dtSearch Index Step

The Build dtSearch Index Step provides options for both running full builds and incremental builds of dtSearch indexes. The step includes an option for always forcing a full build. If this option is not selected, an incremental build will be executed.

It is important to note that the dtSearch index building behavior in Relativity is already very defensive. If the step is configured to run incrementally, it will still run a full build if the dtSearch Search Index has never been built before. These built-in protections help prevent the step configuration from creating a broken dtSearch execution.

Run Structured Analytics Step

The Run Structured Analytics Set Step enables the execution of structured analytics sets as a part of your workflows. With this step, Email Threading, Name Normalization, Textual Near Duplicate Identification, Language Identification, and Repeated Content Identification can be included in your automated workflows. We strongly recommend following the Relativity guidelines for setting up structured analytics sets when planning to include them in your automated workflows.

When running Structured Analytics Sets from Relativity, several options are presented.

These options have been recreated as a part of step configuration and will be passed to the structured analytics set when executing it. Additionally, the same restrictions are included in the step configuration such as not being able to combine updating new documents when repopulating text. This is displayed clearly in Delegate.

NOTE: If analytics is not properly configured, this step will not be available for selection.

Populate, Build, and Activate Analytics Index Step

The Populate, Build, and Activate Analytics Index Step allows for the execution of content analytics sets during workflow execution. This includes both conceptual and contextual analytics indexes. When including these steps, the step will perform all 3 major phases of building an Analytics Index including populating the index, building it, and activating it.

Currently, the functionality provided by this step is analog to pressing the "Populate Index: Full" button on the Analytics index view page.

NOTE: If analytics is not properly configured, this step will not be available for selection.

Run Search Term Report Step

The Run Search Term Report (STR) provides the ability to include STRs as a part of your workflows. When running STRs as a part of workflows, they will always run all terms and replace existing data.

Run Relativity Script

With the Run Relativity Script step, running scripts become an integral part of most workflows. The dropdown here has an extra layer of security that prevents the selection of Relativity scripts that the current user does not have access to execute.

If a user navigates to a workflow that already exists, configured with a script they do not have access to, they may run the workflow or change the script to a different script they do have access to, but they will not be able to change it back to the original one.
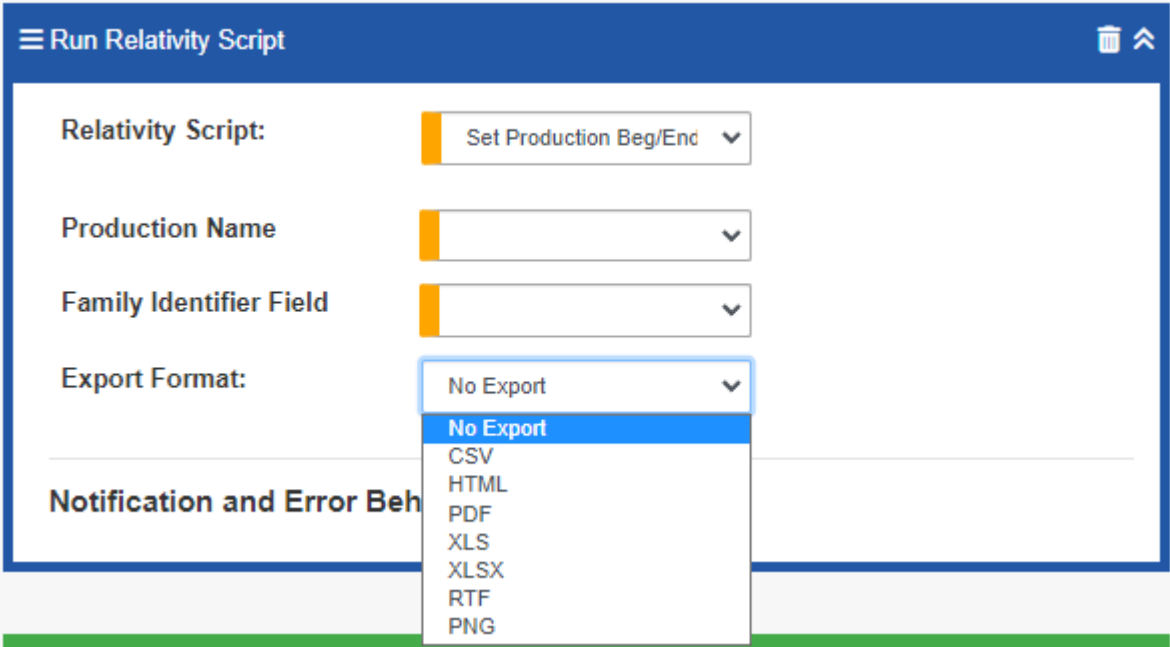
Export Format

The Export Format option allows the user to choose the exported script results file type. Emails can be provided for where the export will be sent. The exported file can also be accessed from the Run History after the workflow has been completed.

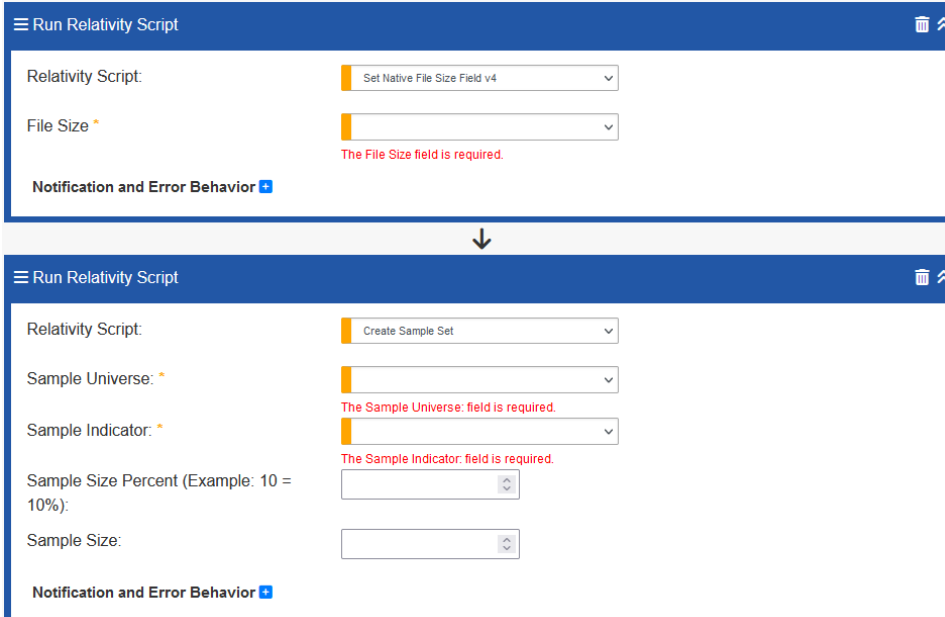| Server 2022+	Server 2021
CSV, HTML, PDF, XLS, XLSX, RFT, PNG	CSV

Upon script selection, the step is updated to provide all the field options configured in the script.

In addition to respecting field requirements on script execution, all script fields are validated upon workflow Create, Save, and Run.

Webhook Step

This step allows the user to call out to a custom webhook that can then trigger other work to be done. This can be used to send notifications to external messaging systems such as Slack or Teams as well as start other workflows in other systems or within Delegate.

The Webhook Step issues a post request to a configured URL with some basic information about the workflow in the request body. The provided URL must be HTTPS.

4.4 Running the Workflow

Once all steps have been added and configured, click Create to go to the next step of running the workflow. Delegate validates every field for proper configuration upon workflow creation, update, or when attempting to run the workflow. The browser will automatically navigate to the first validation message.

Once the workflow is saved successfully, the workflow is ready to run. Click Run at the top of the workflow to begin execution. The workflow will be successfully queued with the Delegate agent and the first step will begin execution. The browser will automatically scroll down to the first step in the workflow and display an indicator for which step is processing.

The Workflow Run Details will provide information about the current workflow execution.

Clicking on Full Details presents a more in depth set of information about the current workflow execution.

As the workflow progresses, status is automatically updated and can be checked at any time.

There is no need to remain on the workflow for the duration.

At the end of the workflow, the workflow complete notification will trigger, and if configured, provide a summary of the tasks in the workflow.

Manually Pause Workflow

Users can pause a running workflow manually. When paused, the currently executing step will complete, but the workflow will halt, preventing progression to the next step. If the last step is running when the workflow is paused, it will finish the step and remain in a paused state until manually resumed.

Run History

Every time a workflow is run a new entry is added to the workflow history. At the bottom of the workflow is a Run History table providing details about the step history for each workflow execution.

Clicking on the View Details button displays a modal with step details for that run. In the example below, the first run of this workflow included two steps. The workflow was edited, and a new step was added resulting in the second run executing three steps.

First run:

Second Run:

Paused Workflows

When a step is configured to pause the workflow on error or partial complete, via the Pause Step, or manually paused, the workflow will be placed into a paused state. If notifications are configured for the workflow, end users will be notified immediately that something has failed to process, and the workflow has paused.

In addition to this, several visual cues are provided in the software. The status on the Automated Workflows tab will update to display "errored."

On the workflow, the step that resulted in the pause will get a pause icon next to it.

In the workflow full details, a stopped icon is displayed next to the failed step along with the friendly message for the error. The full details of the error are available via the notification or by downloading the log from the Configuration tab under the Delegate Admin tab.

Workflow Execution Details					
Step	Status	Started	Finished	Duration	Message
Step 1 - Run Imaging Set (Initial Imaging Set)	✅	6/22/2022 10:22:02 AM	6/22/2022 10:22:33 AM	< 1M	Imaging job complete
Step 2 - Run Ocr Step (Initial Extracted Text Generation)	✅	6/22/2022 10:23:17 AM	6/22/2022 10:37:02 AM	0H 13M	Ocr job complete
Step 3 - Build dtSearch Index (Standard dtSearch - All Docs)	✅	6/22/2022 10:37:32 AM	6/22/2022 10:38:02 AM	< 1M	DtSearch index build complete
Step 4 - Run Relativity Script	❗	--	--	--	Unhandled exception during step execution, contact your system administrator for more details.
Step 5 - Run Relativity Script	⏱	--	--	--	--
Step 6 - Run Relativity Script	⏱	--	--	--	--

The pause state provides a range of options for next steps. On the Workflow Run Details section of the workflow page, two new buttons are available that provide 4 different options.

The options are provided so that your team can make the right decision before continuing the workflow. In some cases, failures may be due to misconfiguration or bad data. These require manual intervention within the workspace before the workflow can continue. In some cases, it may be that the wrong resource was selected resulting in an error and the workflow needs to be edited and re-run.

These options provide flexibility when deciding how the error should be handled.

Stop	Cancels the current workflow execution and allows the workflow to be edited, modified, deleted, or re-run.
Restart from Beginning	If updates to the process need to be made and run sequentially, this option allows you to start again from the beginning ensuring that dependent data is in the state it needs to be for each next step.
Restart from Current Step	Sometimes a minor configuration or setup option needs to be corrected for the resource configured for the failing step. When this happens, making that correction and restarting from the current step prevents the rerunning of existing work product.
Resume at Next Step	Occasionally, there may not be an immediate or obvious fix for the resource defined in the failing step. When this happens, if the remaining steps are not dependent on this step, you may want to continue the workflow.

4.5 Exporting and Automating Templates

Automated Workflows can be exported to a template and then imported to quickly start new workflows in the current workspace or any other workspace.

Exporting

To export a template, navigate to the workflow and open the workflow. At the top of the page click the Export Template button.
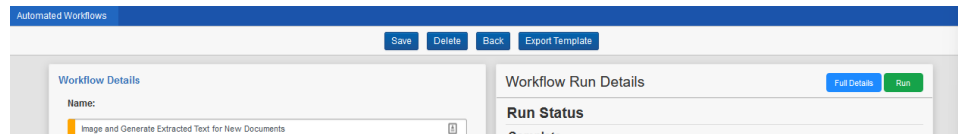
A JSON file with the same name as the workflow will be downloaded.

Importing

To import a template, navigate to the Automated Workflows tab on the workspace where the template should be imported.

Clicking on the import template button will display a workflow import form asking you to supply the JSON file from the previous section.
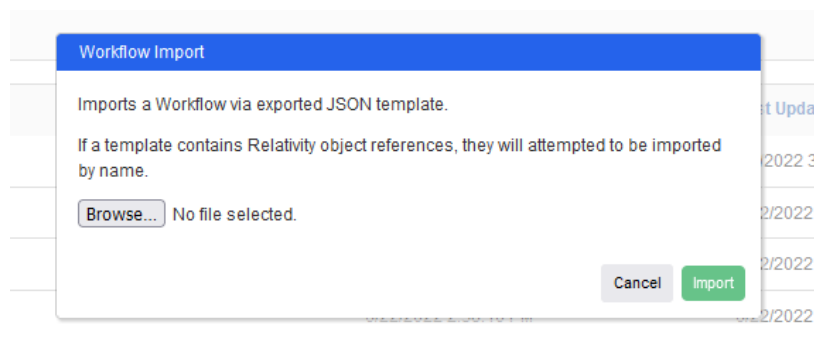
Browse to the file and click Import.

You will automatically navigate to the workflow creation page with as much information from the template automatically filled out as possible.

Step configuration is mapped automatically by resource name. If your workspaces utilize workspace templates with similarly named Relativity resources, the import will automatically select the existing one. Otherwise, each step that does not have a match will trigger validation so that you can update the value before saving the workflow.

4.6 FAQs and Troubleshooting

Preface
Delegate is a tool that handles the enqueuing and monitoring of Relativity resources and applications. Milyli cannot provide direct support for the configuration and troubleshooting of Relativity components. That said, we will always do our best to assist with any situation and provide advice when Relativity support should be contacted.

Exporting Delegate Logs

In some situations, Milyli Support may request that you share the error logs with us. To download the error logs, navigate to the Delegate Admin Tab and select the Delegate Settings tab.

At the bottom of the page is a button that can be used to export the top 10,000 logs from the system error table.

Frequently Asked Questions

What happens when the resource referenced by a step is deleted before the automated workflow is run manually?

Every time a user attempts to run a workflow, the workflow is validated. If a resource has been removed from Relativity, the user will be notified immediately to reconfigure the step.

What happens if a resource referenced by a step is deleted before the step is executed while an automation is currently running?

When Delegate gets to that step, the step will error, and the workflow will be paused based on step configuration. See the section above about paused workflows for next steps.

What happens if a resource referenced by a step is run manually outside of the automated workflow and is already running when the workflow gets to that step?

Delegate will wait for the current resource execution to complete and then trigger the run again. For example, an imaging set is currently imaging documents. The workflow is configured to run that same imaging set as a step in the workflow. The workflow runs, gets to this step, and sees that it is already running. The workflow will wait for execution to be completed and then queue the imaging set to run.

This process allows Delegate to be defensive even when accidental runs occur within the workspace. While this results in additional execution time, it ensures peace of mind knowing that it will get to the next step.

What happens if someone stops a Relativity resource manually while the automated workflow is on a step for that resource?

The step will enter an errored state and the workflow will be paused based on the step configuration. See the section above about paused workflows for next steps.

What happens if the Relativity resource referenced by a step was already run and is in an errored state before the workflow gets to that step?

The automated workflow will disregard the errored state and attempt to run the resource with the configured settings.

What happens if I start multiple workflows at the same time?

Delegate will initialize and enqueue the resource for the first step of each workflow. If these workflows share resources or queues in Relativity, Relativity will remain responsible for determining priority and managing the queue. Delegate will continue to monitor the status of the resource until it completes and then automatically advance to the next step.

Can I use two resource pools, each with their own agent and worker servers, analytics servers, worker manager server, and to run two automations simultaneously? Will they interfere with each other?

The short answer is both workflows will run simultaneously on the correct infrastructure and Delegate will not be impacted. Delegate is made with this scenario in mind!

Delegate will respect the separation of work across resource pools with no additional setup or configuration.

What happens if we add a second Delegate agent?

Adding a second Delegate agent will provide little value. That said, if a second agent is added it will not interfere with the existing one. Delegate has a global rate limit restricting how often the database is accessed via our agents, preventing unnecessary strain on your SQL servers.

What happens if we can't figure out why an automated workflow has stopped unexpectedly?

While we have tried to account for as many errors as possible and provide as much information as possible, infrastructure issues can still happen. If it seems like Delegate has failed and not the underlying Relativity resource, reach out to our support team by emailing support@milyli.com and include the exported system log with screenshots of the issue.

What happens if my agent server goes down for an extended period?

As soon as the agent server is brought back online, Delegate will pick up right where it left off. At the next check-in, the agent will execute the last tasks that were enqueued prior to the agent server going offline. If the state of the underlying resource has changed, the workflow will react appropriately.

If the resource has finished, Delegate will move to the next step. If it is still running, it will continue to check its status. If the resource has failed, it will respect the steps configured error configuration and either pause or continue the workflow.

5. Advanced Functions

5.1 API Calls

Automated workflows can now be triggered via outside systems with API Calls to start workflows or check the status.

For setup instructions for the Delegate API, please navigate to the API setup documentation on GitHub or contact us at support@milyli.com for assistance.

Start Workflow

Workflows can be started by submitting a POST request to the workflow start endpoint. Workflows are started by name. If more than one workflow exists with the name, all workflows matching that name will be run.

Resume Workflow

Workflows can be resumed from a pause status by submitting a POST request to the workflow start endpoint. Workflows are resumed by name, if more than one workflow exists with the name, all workflows matching that name will be resumed.

Workflow Status

Workflow status can be checked by submitting a GET request to the workflow status endpoint. Workflow status can be checked at any time.

5.2 Audits

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 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 theaudit 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.

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

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

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

Audit Information

Client:	ID:
Milyli Developers	1055103
Name:	**User:**
Randall, Jerry	Errea, Lissa
Action:	**Timestamp:**
Update	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

5.3 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 createand implement plugins but is intended to provide a high-level overview of what the feature is intended for.
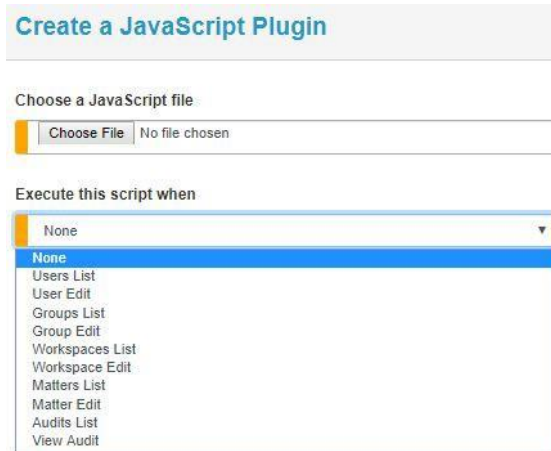
Delegate has advanced functionality that enhances system customization. Behind the scenes, Delegate triggers JavaScript events for various actions, including listing users, creating, or editing them. The plugin functionality enables the execution of custom JavaScript that responds to these events.

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. Anexample 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 tosee about getting a custom plugin developed for your organization, please contact support@milyli.com.