

Disclaimer Acceptance Log

November 8, 2017 - Version 3.5

Contents

- 1 Overview..... 3
 - 1.1 Supported Versions..... 3
 - 1.2 Category 3
 - 1.3 Special Considerations..... 3
- 2 Deployment 4
 - 2.1.1 Install Relativity application to library 4
 - 2.1.2 Install Relativity application to workspace..... 4
 - 2.1.3 Upgrading from previous versions..... 4
- 3 Workflow 6
- 4 Input and Preparation 7
 - 4.1 Add and Enable the Disclaimer Agent..... 7
 - 4.2 Disclaimer Solution Configuration 7
 - Inputs..... 8
 - 4.3 Disclaimers 8
 - Usage..... 8
 - Inputs..... 9
 - 4.4 Reporting 10
 - User Acceptance..... 10
 - Inputs..... 10
 - Errors..... 11
- 5 Results 12
- 6 Troubleshooting 13
- 7 Disclaimer 14

1 Overview

This Relativity Applications allows users to display multiple group specific and/or environment wide disclaimers upon login.

1.1 Supported Versions

This solution is supported in Relativity version 8.1-9.4 with all supported browsers.

1.2 Category

This custom solution consists of the following components:

Relativity script that runs at the workspace level

- Event Handler
- Custom Agent
- Custom Objects
- Relativity Application

1.3 Special Considerations

- The first time a disclaimer is displayed after login, it may take 20-60 seconds for the disclaimer service to start. Afterwards, disclaimers will load much more quickly for subsequent users who are eligible to be prompted to accept a disclaimer.
- This application was designed to only be installed in a single workspace
- The disclaimer text field is HTML enabled mainly to allow text colors, bolding & underlines. Take great care in entering HTML because it could possibly open users to scripting attacks and adversely affect the look of the disclaimer container displayed at login.
- Disable the Disclaimer Acceptance Agent before uninstalling the solution.
- Disclaimer Text HTML may be displayed in a raw format on the disclaimer list view, however it will be fully decoded and presented to users in traditional html when prompted to accept disclaimers.
- Custom components may not exhibit the same performance and behavior as native Relativity features.
- While each solution is carefully built and thoroughly tested to work on your version of Relativity, they are not considered core features and are not eligible for the same level of support as the Relativity platform.

2 Deployment

2.1.1 Install Relativity application to library

1. Log in to Relativity.
2. Navigate to the Admin/Home section.
3. Click on the Application Library tab.
4. Click on the Upload Application button.
5. Click on the Browse... button next to Application File.
6. Select the file RA_Disclaimer_Acceptance_Log.rap and click Open.
7. Click Save.

2.1.2 Install Relativity application to workspace

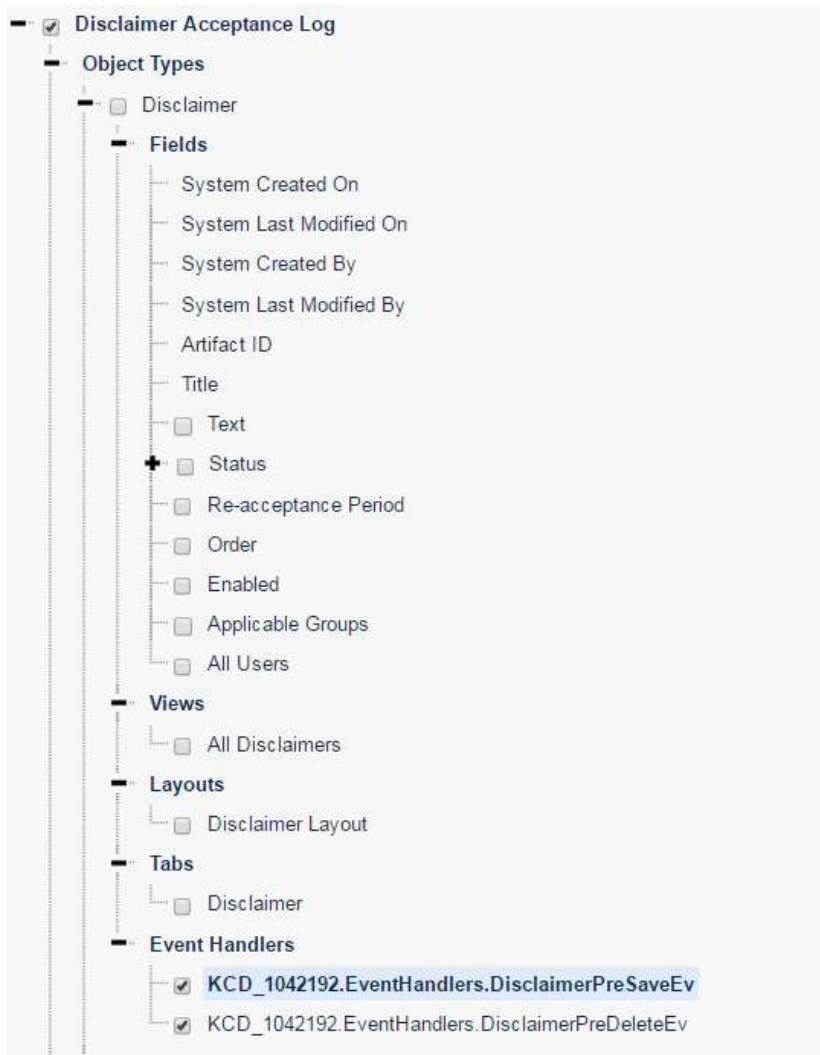
1. Log in to Relativity.
2. Navigate to the Admin/Home section.
3. Click on the Application Library tab.
4. Click on the application Disclaimer Acceptance Log.
5. Under Workspaces Installed, click on the Install button.
6. Next to Workspaces, click on the ellipsis [...] button.
7. Select only a single workspace to install the application to.
8. Click OK.
9. Click Save.

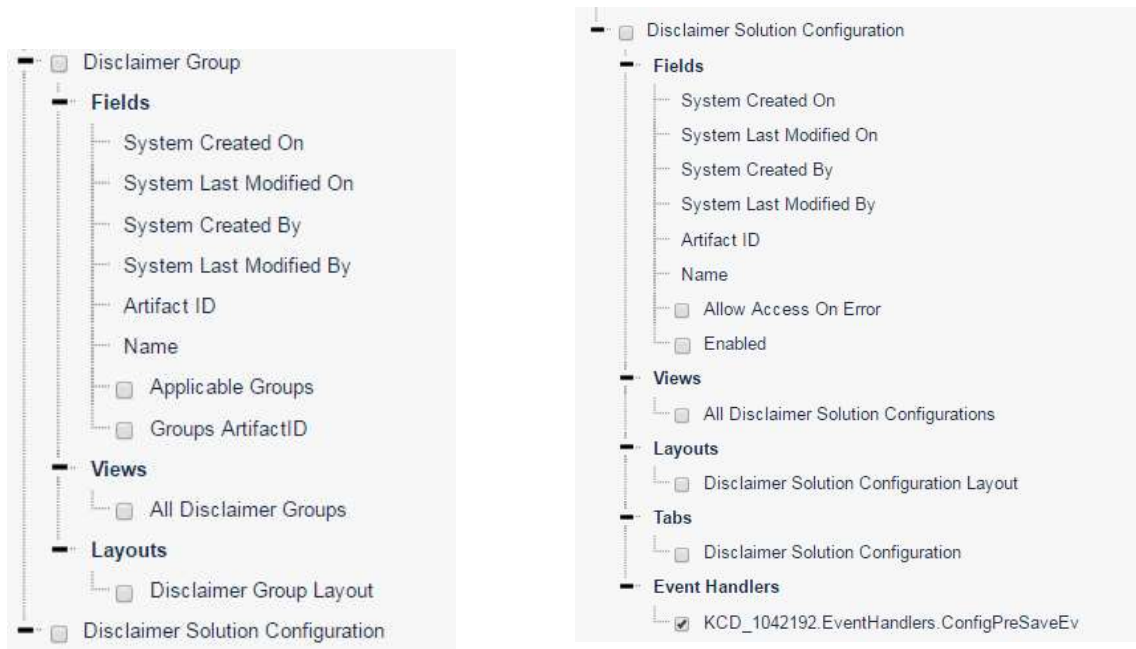
2.1.3 Upgrading from previous versions

If you have already installed a previous version of this application, you are required to complete the following steps to ensure preservation of logs, and complete and stable installation.

1. Log in to Relativity.
2. Navigate to the 'Relativity Applications' tab in the workspace that contains the application
3. Click the Unlock Application button and click OK to accept the confirmation
4. Click on the Uninstall Application button
5. In the Component Summary section, click the '+' to see the components that are part of the application
6. Uncheck everything under **Object types except** the following

- a. Disclaimer Event Handlers
 - i. KCD_1042192.EventHandlers.DisclaimerPreSaveEv
 - ii. KCD_1042192.EventHandlers.DisclaimerPreDeleteEv
- b. Disclaimer Solution Event Handlers
 - i. KCD_1042192.EventHandlers.ConfigPreSaveEv





7. Click the Validate Components button to Validate that the selected components can be removed
8. Click the Uninstall button
9. Within the Administration section, navigate to 'Resource Files' tab and verify that the following Event Handlers are no longer available.
 - a. KCD_1042192.EventHandlers.DisclaimerPreSaveEv
 - b. KCD_1042192.EventHandlers.DisclaimerPreDeleteEv
10. Within the Administration section, navigate to the Application Library tab and delete the 'Disclaimer Acceptance Log' application by clicking on the Delete button
11. Follow instructions from section 2.1.1 and 2.1.2 to install a new version of Disclaimer Acceptance Log

3 Workflow

1. Add the application to the application library
2. Install the application into a workspace
3. Enable the Disclaimer Acceptance Agent

4. Create a Disclaimer Configuration Object in the workspace
5. Create and enable a disclaimer
6. View user acceptance logs and errors under the Disclaimer Reporting tab of the application

4 Input and Preparation

4.1 Add and Enable the Disclaimer Agent

1. Select the Agents tab located at the Admin/Home level
2. Add a new instance of the Disclaimer Acceptance Agent
3. A run interval of 5-60 seconds is recommended and directly affects the time needed to enable/disable disclaimers
4. Enable the agent

Relativity ALERT | Favorites | Hi, Relativity | Search

Workspaces Clients Matters Users Groups Views Choices **Agents** Errors Queue Management Relativity Script Library User Status Instance Details Resource Files

Save Save and New Save and Back Cancel

Agent Information

Name: Disclaimer Acceptance Agent (1)

Agent Type: Disclaimer Acceptance Agent

Agent Server: DV-TT-BRAVO [Clear](#)

Run Interval:
The interval, in seconds, at which this agent checks for available jobs.

Logging level of event details:

☐ Log critical errors only

☐ Log warnings and errors

☒ Log all messages

Status

Enabled: ☒ Yes ☐ No

Other

Keywords:

Notes:

4.2 Disclaimer Solution Configuration

1. In the workspace where the application is installed, select Disclaimer Solution Configuration under the Disclaimer Acceptance Log tab
2. Select New Disclaimer Solution Configuration

- Note: only the settings from the first configuration object created will be recognized by the application

Inputs

- **Name:**
 - The name of the Configuration Object
- **Enabled:**
 - This field Enables/Disables the solution. The state of the configuration object's enabled setting takes precedence over whether or not an individual disclaimer is enabled.

Allow Access on Error option:

Enabled:

Users are allowed to access Relativity in case an error occurs at the disclaimer page after they log in. The user is able to access Relativity and they will be prompted for the disclaimer they were unable to accept the next time they log in.

Disabled:

Users are not allowed to access Relativity when an error occurs at the disclaimer page after they log in. They are presented with a message to contact their system administrator.

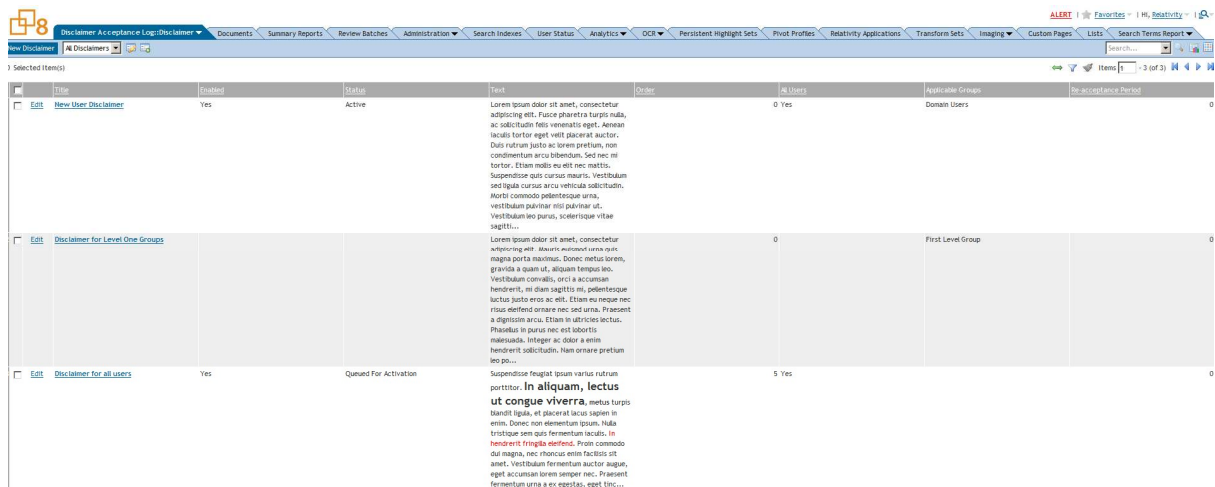
Default Category	
Name:	My COnfig
Enabled:	<input checked="" type="checkbox"/>
Allow Access On Error:	<input type="checkbox"/>

4.3 Disclaimers

Usage

Click the Disclaimer tab to create a new disclaimer. Click New Disclaimer. Enter the input fields below to create a new disclaimer. After it is saved, its status on the view will either be 'Queued for Activation' or 'Queued for Deactivation'. After the agent picks up the newly enabled/disabled disclaimer, it will change the status to 'Active' for enabled disclaimers and the status will be blank for disabled disclaimers.

Refrain from toggling the enabled option with mass edits because its status won't be updated by the agent.



The screenshot shows the 'Disclaimer Acceptance Log' interface. It features a top navigation bar with various tabs like 'Documents', 'Summary Reports', 'Review Batches', 'Administration', 'Search Indexes', 'User Status', 'Analytics', 'OCR', 'Persistent Highlight Sets', 'Pivot Profiles', 'Relativity Applications', 'Transform Sets', 'Imaging', 'Custom Pages', and 'Lists'. Below the navigation bar, there's a table with columns: Title, Enabled, Status, Text, Order, All Users, Applicable Groups, and Re-acceptance Period. The table contains three rows of disclaimers. The first row is 'New User Disclaimer', the second is 'Disclaimer for Level One Groups', and the third is 'Disclaimer for all users'. Each row has an 'Edit' link and a checkbox. The 'Text' column contains placeholder text like 'Lorem ipsum dolor sit amet, consectetur adipiscing elit...'.

Title	Enabled	Status	Text	Order	All Users	Applicable Groups	Re-acceptance Period
New User Disclaimer	Yes	Active	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce pharetra turpis nulla, ac sodictudin feis venenatis eget. Ametian laculis tortor eget velit placerat auctor. Duis rutrum justo ac lorem pretium, non conderitum arcu bibendum. Sed nec mi tortor. Etiam nullo eu elit nec metus. Suspendisse quis cursus mauris. Vestibulum sed ligula cursus arcu vehicula sodictudin. Morbi conmodo pedentisque urna, vestibulum punitar nisi punitar ut. Vestibulum leo purus, scelerisque vitae sagittis...	0	Yes	Domain Users	0
Disclaimer for Level One Groups			Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam enim urna quis magna porta maximus. Donec metus lorem, gravida a quam ut, aliquam tempus leo. Vestibulum conmodo, orci a accumsan hendrerit, mi diam sagittis mi, pedentisque luctus justo eros ac elit. Etiam eu neque nec risus deffend ornare nec sed urna. Praesent a dignism arcu. Etiam in ultricies lectus. Phasellus in purus nec est laboris malesuada. Integer ac dolor a enim hendrerit sodictudin. Nam ornare pretium leo ph...	0		First Level Group	0
Disclaimer for all users	Yes	Quarred For Activation	Suspendisse feugiat ipsum varius rutrum porttitor. In aliquam, lectus ut congue viverra, metus turpis dantit ligula, et placerat lacus sapien in enim. Donec non elementum ipsum, nulla tristique sem quis fermentum laculis. In hendrerit fringila deffend. Proin conmodo dai magna, nec rhoncus enim factis sit amet. Vestibulum fermentum auctor augue, eget accumsan lorem semper nec. Praesent fermentum urna a eu egestas, eget tinc...	5	Yes		0

Inputs

Title

- This is the title that will be displayed above the disclaimers

Text

- This is the text field for the disclaimers

Order

- The order number is used to sort disclaimers when a user is eligible for multiple disclaimers

Enabled

- Used as a flag by the Agent to enable the disclaimer for applicable users

Re-acceptance Period

- This field can be used to re-prompt a user to accept a disclaimer after a certain number of days
- If no choice is selected, users are not prompted to re-accept disclaimers.


All Users

- This setting takes precedence over applicable groups and enables the disclaimer for all users in the environment

Applicable Groups:

- Applies the disclaimer for users only in the selected groups

Disclaimer Groups exist as an internal RDO specific to this application. They reflect the groups that exist in the admin level and are automatically updated by the agent. In order to reflect deleted groups from the admin level, it must be manually removed from any disclaimers in which it is attached.


Disclaimer Acceptance Log
ALERT | ★ Favorites | Hi, Relativity | 🔍

Disclaimer Acceptance Log::Disclaimer
Documents
Review Batches
Reporting
Case Admin
Job Admin
Workspace Admin

Disclaimer Layout
Save
Save and New
Save and Back
Cancel
Record 2 of 2

Default Category

Title: Reaccept

Text:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin non orci molestie, luctus quam vel, fringilla tellus. Proin facilisis purus eu ex vulputate, nec tincidunt purus semper. Sed vitae neque diam. Donec consectetur lobortis aliquet. Praesent id metus at metus mattis interdum. Quisque turpis erat, cursus non quam non, hendrerit vulputate sapien. Curabitur ornare urna a elementum mollis. Aliquam erat volutpat. Phasellus vitae maximus sem, at venenatis orci. Nulla auctor quis urna quis tincidunt.

Sed urna tellus, posuere vel metus id, posuere ornare nisi. Cras ornare commodo urna a lacinia. Nullam fringilla urna a purus tincidunt, non interdum massa hendrerit. Vivamus a accumsan ante. Vestibulum aliquet efficitur sagittis. Curabitur blandit metus a tristique laoreet. Pellentesque semper felis nec justo tincidunt molestie. Cras id semper tellus. Donec nec euismod tortor. Fusce faucibus nisi a mauris facilisis, quis pulvinar lectus pellentesque. Ut sed enim et leo tincidunt sagittis.

Sed neque turpis, ullamcorper ut pretium vitae, suscipit sed ex. Quisque volutpat malesuada vulputate. Duis eget purus velit. Nunc quis lorem libero. Suspendisse ullamcorper, quam non mollis bibendum, urna nunc sagittis augue, ut sollicitudin magna eros in purus. In id diam nec mauris viverra laoreet. Integer velit magna, finibus eget varius in, varius nec ex. Interdum et malesuada fames ac ante ipsum primis in faucibus. Vivamus risus felis, ultrices et aliquet aliquet, faucibus vel sem. Aliquam congue sodales libero vel scelerisque.

Ut feugiat, nulla non bibendum maximus, leo nibh luctus tortor, ac tincidunt augue arcu id nulla. Suspendisse ac luctus magna, ut convallis nisi. Maecenas molestie dolor vel purus posuere, in accumsan urna bibendum. In urna enim, pretium sed mauris non, feugiat cursus magna. Cras nunc dui, cursus nec magna vel, consequat bibendum orci. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Sed aliquam, tortor eu molestie euismod, diam tellus hendrerit risus, vitae laoreet massa lectus quis urna. Pellentesque luctus eu magna sed malesuada.

Curabitur sed justo nec risus rutrum porttitor. Morbi posuere commodo lorem, at congue nibh laoreet sit amet. Donec id suscipit diam. In imperdiet urna id feugiat vulputate. Ut in pretium nunc. Vivamus tincidunt orci sit amet augue maximus, at rutrum eros efficitur. Aliquam id velit eros. Praesent varius risus a quam venenatis, sed suscipit urna pulvinar. Integer ut arcu varius, egestas ipsum non, tincidunt nulla. Morbi vulputate tempus purus eget tristique. Sed dapibus vestibulum elit sit amet ornare. Sed sapien arcu, vehicula sit amet leo et, convallis lacinia tortor. Morbi id venenatis dolor. Mauris fringilla sit amet felis ut commodo. Nunc luctus nisi quis dui venenatis, quis varius elit porttitor.

Order: 10

Enabled: ☒

Re-acceptance Period: 30

All Users: ☒

Applicable Groups: ...

4.4 Reporting

There is a User Acceptance and an error report available under the Disclaimer Reporting tab

User Acceptance

Inputs

- Disclaimer:
 - Select the disclaimer for the log you would like to view

Note: The log is still available for deleted disclaimers

- Include Disclaimer Text:
 - Users can determine whether or not they want to display the disclaimer text that was accepted when returning their report.
 - Timestamps are in UTC

Disclaimer Acceptance Log::Disclaimer Reporting

Documents Review Batches Reporting Case Admin Job Admin Workspace Admin Persistent ALERT Favorites | Hi, Relativity

☒ Disclaimer User Acceptance
☐ Disclaimer User Errors

This script reports on user acceptance for a disclaimer. WCD_1042192

Inputs

Disclaimers: Daily Disclaimer

Include Disclaimer Text: No


Preview Run

UserID	FirstName	LastName	EmailAddress	Date Of Acceptance	Disclaimer Title
9	Relativity	Admin	relativity.admin@kcura.com	Mar 6 2015 3:51PM	Daily Disclaimer

All 1 Export to File Go Viewing all items in sets of 25 per page

Errors

The User Errors Script displays all errors pertaining to the disclaimer solution that were able to be captured.


ALERT | [Favorites](#) | Hi, [Relativity](#) | [Search](#)

Disclaimer Acceptance Log:Disclaimer Reporting
Documents
Summary Reports
Review Batches
Administration
Search Indexes
User Status
Analytics
OCR
Persistent

Disclaimer Acceptance Reporting

Disclaimer User Acceptance

Disclaimer User Errors

This script reports on errors that occur during disclaimer acceptance.
KCD_1042192

Preview

Run

Date of Error	Error	UserID	FirstName	LastName	EmailAddress
1 Feb 27 2015 12:00AM	Unable to retrieve disclaimers, user must contact administrator	9	Relativity	Admin	relativity.admin@kcura.cc
2 Feb 21 2015 12:00AM	Unable to record users acceptance	9	Relativity	Admin	relativity.admin@kcura.cc
3 Feb 5 2015 12:00AM	Unable to retrieve disclaimers, user must contact administrator	9	Relativity	Admin	relativity.admin@kcura.cc

All 3

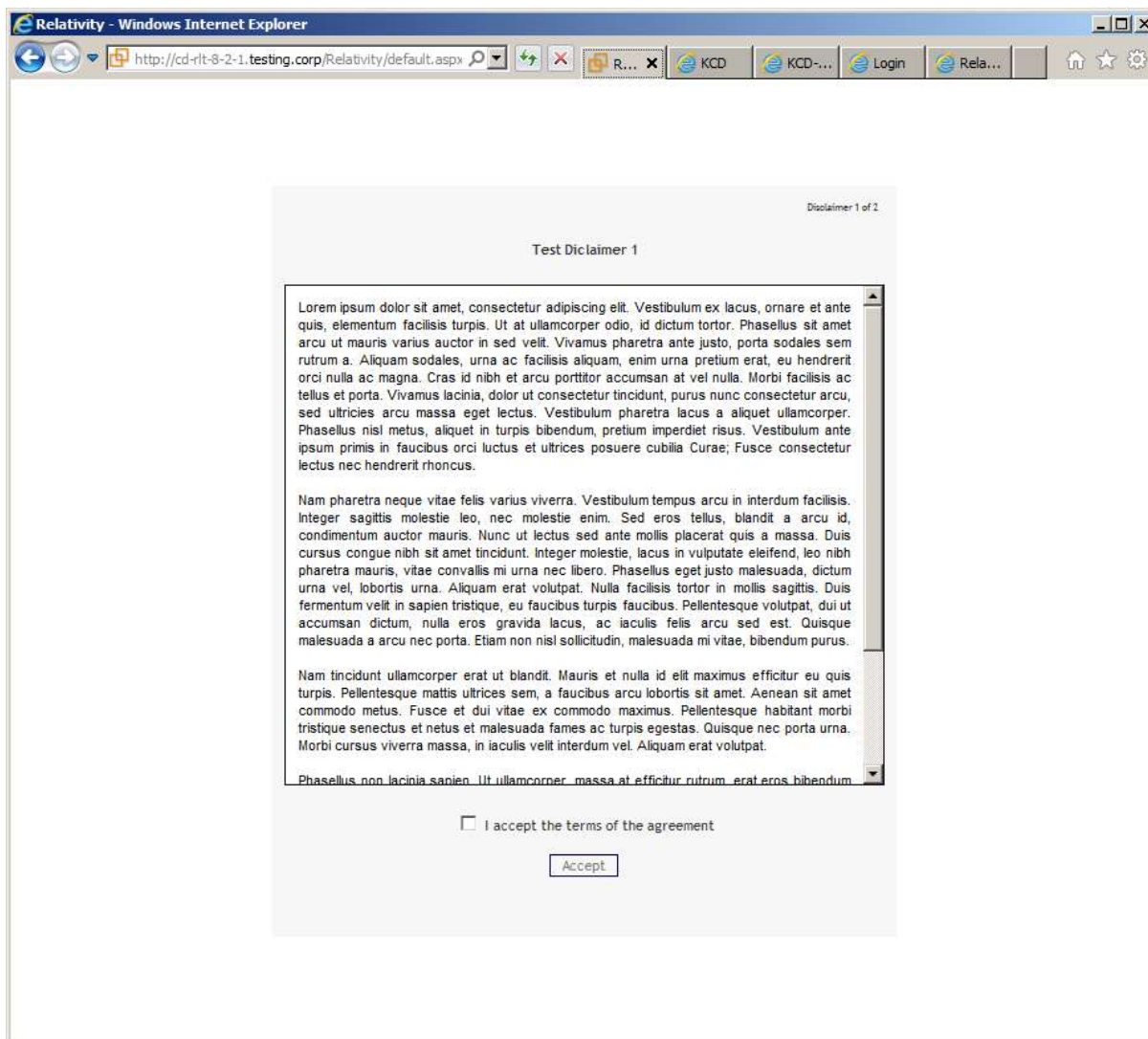
Export to File

Go

Viewing all items in sets of 25 per page

5 Results

Users eligible to receive disclaimers will be prompted to accept them after logging into relativity. Users will never be prompted to accept the disclaimer again unless the re-acceptance feature is used.



6 Troubleshooting

The whole disclaimer acceptance log solution can manually be disabled outside of Relativity by executing the following command in the EDDS database (Relativity version less than 9.4.315.5) :

```
UPDATE [EDDS].[eddsdbo].[Configuration] SET [Value] = '' WHERE [Section] = 'kCura.EDDS.Web' AND [Name] = 'TermsLinkHref'
```

The solution can be disabled using the following command in the EDDS database for Relativity version greater than 9.4.315.5 :

```
update [EDDS].[eddsdbo].[Configuration] set Value = 'false' where [Name] = 'UsersMustAgreeToTermsOfUse'
```

- To Enable the solution from this point, make sure that the Agent is running then toggle the enabled switch on the Disclaimer Configuration Object in between the execution time interval of the Agent.

7 Disclaimer

This solution is intended for use only in the Relativity versions specified in this document and run under the guidelines presented. While each solution is carefully built and thoroughly tested to work on the versions of Relativity specified in this document, this script is not a core feature of Relativity and is not eligible for the same level of support as the Relativity platform.

In addition, custom components may not exhibit the same performance and behavior as native Relativity features. Custom solutions do not specify permission settings unless explicitly requested by the client.