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1 Relativity Integration Points

Relativity Integration Points offers a solution to configure integrations from third party systems to Relativity objects.

Interested developers can create a separate ADS application to pull data from a third party system source provider. Integration Points ingests that application to handle the scheduling, set up, field mapping, and actual import into Relativity. By using the Integration Points platform, developers can reduce the amount of time needed to create these custom integrations while end users receive a consistent and easy set up approach.

Visit the Developer documentation site

In addition to supporting developer-built custom integrations, Integration Points also provides a built-in integration to Lightweight Directory Access Protocol (LDAP) enabled HR servers such as Microsoft Active Directory. Built on the Integration Points platform, the LDAP integration can filter and schedule imports from Active Directory data into a Relativity workspace. For example, the workstations, employee names, data shares, etc.

Relativity Integration Points is also integrated with the Relativity ECA and Investigation application, which can help you quickly assess risk and make informed decisions about your data at the earliest stages of a case or investigation. See Relativity ECA and Investigation.

Note: You can locate an application's version number by navigating to Applications & Scripts > Application Library tab. You must be a system admin to access this tab.

1.1 Using Integration Points scenarios

Using Integration Points as a developer

You're the lead developer of an organization responsible for building Relativity customizations. One of your clients started tracking all of their litigation-related information outside of Relativity in a new product called Whazootie. They mention to you that they would love to have this same information available in their Relativity workspaces to tie their document review to specific case information.

You use Whazootie's APIs to build a simple Relativity application to connect to a Whazootie website without building any import or setup steps. You give the application to your client along with Integration Points for them to install in a workspace. They can use all the security, scheduling, setup, and import options available in Integration Points along with the Whazootie connection to set up multiple imports that bring Whazootie data into their Relativity workspace.
Using Integration Points as an end user

You’re the litigation support professional responsible for setting up workflows and templates to help manage your company’s legal hold procedure using Relativity Legal Hold. You want to ensure that all custodian information is kept up-to-date so that holds always go to the correct email address and that the litigation team is aware of custodians who have changed departments or left the company. Unfortunately, all of the custodian information is scattered across multiple company HR servers containing unnecessary computer and network data.

To solve this problem, you use the Integration Points set up wizard to configure new integrations to each HR server, mapping items to specific Relativity fields. You work with your team to configure a filter in each setup so that only the appropriate employees are brought in as Custodians and schedule the import to occur automatically each night during off-hours. As a result, your custodian address book is always up-to-date, ensuring that proper litigation workflows are followed with every custodian.
2 Installing Integration Points

To successfully use Relativity Integration Points, you need to install the Integration Points application to at least one workspace.

Note: Contact Relativity Support to obtain the Integration Points application.

Use the following procedures to install Integration Points:

1. Install Integration Points from either the Application Library or an external file. See Installing Integration Points below.
2. Add the Integration Points agent. See Adding the Integration Points agent below.
3. Access Integration Points. See Accessing Integration Points on the next page.

2.1 System requirements and specifications

You must have the following in order to use Integration Points:

- Integration Points 1.2 is only compatible with Relativity 9.3. As such, Integration Points has the same system requirements as its compatible Relativity version. For more information, see the System Requirements guide.

- Relativity Integration Points requires a Windows authenticated Web API path specified in the configuration table. If you’re currently only using forms authentication, you need to create a new Relativity site. For more information, see Authentication in the Admin guide.

2.2 Installing Integration Points

Since Integration Points uses the ADS framework, you have the following options available for installing Integration Points in your environment. See Relativity Applications in the Admin guide.

- **Install Integration Points from the Application Library** - If you add the Integration Points application to the Application Library, you can install it to the current workspace, or to multiple workspaces at once, from the Application Library.

- **Install Integration Points from an external file** - You can import the Integration Points application into your workspace from an external file if it hasn't been added to the Application Library.

2.3 Adding the Integration Points agent

After you install Integration Points, add the Integration Points Agent by going to the Agents tab and clicking **New Agent**. Add one Relativity Integration Points Agent per Resource Pool. See Application-specific agents in the Agents guide for more information.

Verify the Enable column displays Yes for the Relativity Integration Points Agent.
2.4 Accessing Integration Points

Once you've installed Integration Points, you should see the following Integration Points application tab in your workspace:
3 Creating an integration point

3.1 Creating an integration point

To create an integration point:

1. From the Integration Point tab, click **New Integration Point**.

2. Complete the fields in the (1) **Set Integration Details** wizard layout. See the [Set Integration Details layout fields](#).

3. Click **Next**.

4. Complete the fields in the (2) **Connect to Source** wizard layout. Here, you can enter the settings required to connect to the source provider (third party system). See the [Connect to Source layout fields](#) on page 11.

5. Click **Next**. Integration Points attempts to connect to the specified source using the settings you input.

6. Map the attributes or fields returned from the selected source provider with the corresponding Relativity field in the (3) **Map Fields** wizard. See the [Map Fields on page 12](#).

7. When you're finished mapping, click **Save**. The integration point is now scheduled to run. For information about a job statuses, see [Monitoring an integration point on page 15](#).

3.2 Set Integration Details layout fields

The (1) **Set Integration Details** layout contains the following fields:
General

- **Integration Name** - the name of your integration for reference purposes.
- **Overwrite** - select one of the following options to control how Integration Points treats existing Relativity object data upon import.
  - **Append/Overlay** - adds new records and overlays data on existing records.
  - **Append** - loads only new records. Pre-existing records aren't updated.
- **Overlay Only** - updates existing records only. Records not existing in Relativity aren't created. You must include a workspace identifier in an overlay load, as this field acts as a link indicating to Integration Points where to import the data.

- **Email Notification Recipients** - Integration Points will send a notification to the entered email address(es), detailing whether the Integration Point sync succeeded or failed. Use semi colons between addresses.

- **Log Errors** - select Yes or No to denote whether Integration Points tracks item level errors. If you select Yes, each Job History entry will also log any item level errors. For example, a fixed length text field not being large enough to contain an imported value. If you select No, Integration Points won't log these item level errors. Regardless of your selection, job-level errors are always recorded in each Job History entry. For example, the import aborts due to a connection failure. See [Monitoring an integration point on page 15](#).

### Integration

- **Source Provider** - All possible third party systems that you can import data from. As developers build and add new custom integrations, this list will grow.

- **Destination RDO** - the Relativity Dynamic Object (RDO) where you want to import the data.

### Import Scheduling

- **Enable Scheduler** - select Yes to enable the scheduling functionality for this integration. You must enable the scheduler for any kind of import to occur. See [Disabling an Integration Point sync on page 13](#).

- **Frequency** - the interval at which Integration Points syncs.
  - **Daily** - select this option to sync once every day.
  - **Weekly** - select the day(s) that you want Integration Points to sync once every day.
    - **Reoccur** - enter the number of week(s) in which Integration Points recurrently syncs.
  - **Monthly** - select the day of the month that you want Integration Point to sync once every month.
    - **Reoccur** - enter the number of month(s) in which Integration Points recurrently syncs.
  - **Send On**
    - **Day __ the month** - select the day of the month that you want Integration Points to sync.
    - **The __ __ of the Month** - select this option for Integration Points to sync on the chosen day of every month. For example, "The Second Friday of the month."

- **Start Date** - the date that you want Integration Points to start syncing the data.

- **End Date** - (Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.

- **Scheduled Time** - the time at which Integration Points syncs. This time is local to your PC, not to the server.
3.3 Connect to Source layout fields

Integration Points includes a built-in sync to LDAP-enabled HR servers. If you selected the LDAP source provider in the (1) Set Integration Details layout, the (2) Connect to Source layout contains the following fields:

**Note:** Every custom integration contains a different set of fields or settings for how to connect to that specific third party system. As a result, you may see different connection settings than the ones shown here.

- **Connection Path** - the server used to locate the directory. For example, "Relativity.corp." Note that you can optionally include specific organizational unit references by adding a forward slash (/) after the server. The following example looks up items in the Relativity.corp domain within the Employees organizational unit: `Relativity.corp/OU=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=corp`

- **Object Filter String** - This string specifies certain attributes that the requested LDAP entries must contain that Integration Points considers for import. For more information on search filter syntax, refer to this Microsoft article: [https://msdn.microsoft.com/en-us/library/aa746475(v=vs.85).aspx](https://msdn.microsoft.com/en-us/library/aa746475(v=vs.85).aspx)

- **Authentication** - select one of the following authentication types. FastBind is typically the standard authentication option used to connect to LDAP-enabled data sources.
  - Anonymous
  - Encryption
  - FastBind
  - Secure Socket Layer

- **Username** - if required by the server's authentication, enter a username to connect to the server (connection path).

- **Password** - if required by the server's authentication, you can enter a password to connect to the server (connection path).
- **Import Nested Items** - select **Yes** for the import to include all sub directories in the specified connection path. Select **No** for the import to include only the first level items brought back in the connection path.

### 3.4 Map Fields

The (3) **Map Fields** wizard contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back. Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

Use the Shift + click and Ctrl + click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client. Use the single and double arrows or double-click a field to move selected fields between columns.

![Map Fields Wizard](image)

**Note:** You don’t need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or Unique Name. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Custodian RDO but it might not be unique. These two identifier values can be the same.

The following Import Settings are also available, depending on your Integration Details settings:

- **Unique Identifier** – for every import, you must select a Relativity field that ends up containing the unique identifier for the specific import. If you select an Overlay or Append/Overlay to run, Integration Points uses this field as the key to determine which records already exist in the Relativity workspace.
- **Parent Attribute** – this setting is only visible if the current import is importing into a Relativity object that contains a Parent RDO. If a Parent RDO exists on the object, you can select a specific attribute from the source provider that contains the Parent RDO unique name.

- **Import Native Files** - this Yes/No field is only visible when you select the Documents RDO, and indicates whether Integration Points should import any native files in the sync.
  - **Native File Path** - this field appears if you select Yes to import the native files. From the drop-down menu, select the source provider attribute containing the file path links to the natives that you want to import.

- **Custodian Manager Contains Link** - this Yes/No field is only visible when you select the Custodian RDO from the LDAP source provider, and indicates if Legal Hold should expect a linked value in the manager field from LDAP.

### 3.5 Manually running an integration point

Once you’ve created an Integration Point, you can manually run an integration point by selecting the Integration Point, and clicking **Import Now** from the console. This lets you run an integration point instantly, as opposed to scheduling an integration point to run.

### 3.6 Disabling an Integration Point sync

To disable an integration point sync, simply turn off the scheduler.

1. From the Integration Points landing page, click the Integration Point Name that you wish to disable.
2. Click **Edit**.
3. From the Import Scheduling section under Enable Scheduler, select the **No** radio button. This dis-
ables the scheduling mechanism for that Integration Point.

**Import Scheduling**

Enable Scheduler:  Yes  No
4 Monitoring an integration point

After you create an integration point and initiate the import process, you can monitor the job status on the Job History tab. This tab lists an entry for each integration point job, and also provides you with the ability to view additional details for a specific job.

The Job History tab lists the following information that you can use to monitor the status of an integration point job:

- **Name** - the name for a specific job run by the integration point.
- **Integration Point** - the name of the integration point used to run the job.
- **Job Status** - the current status of an integration point job. The following job statuses are available:
  - [blank] - the job hasn't started or wasn't run.
  - **Pending** - the job has been submitted but an agent hasn't picked it up, so the import process hasn't started.
  - **Processing** - the job is currently running.
  - **Error** - **Job Failed** - a job-level error occurred and the import wasn't completed. The integration point may have been able to import some of the records before the error occurred.
  - **Completed with Errors** - the import job completed but at least one item-level error occurred. If you set the Log Errors field to Yes for the integration point, you can view the item-level errors in the section called Job History Errors on the Job Details layout. See Viewing job history details on the next page.
  - **Completed** - the import job completed without any item-level errors.
- **Records Imported** - the number of records successfully imported when the job ran.
- **Records with Errors** - the number of records that the integration point failed to import due to item-level errors.
- **Start Time (UTC)** - the date and time that a job started running in Coordinated Universal Time (UTC).

### 4.1 Viewing job history details

To view additional history information, click the name of a specific job listed on the Job History tab. The Job Details layout displays basic job information, import statistics, and a detailed list of errors. The Job History Error section always logs job-level errors. If you set the Log Errors field to Yes, then it also logs item-level errors. See [Creating an integration point on page 8](#).

The Job Details layout includes many of the same fields displayed on the Job History tab. The following list includes the additional fields displayed in this layout:

- **End Time (UTC)** - the date and time that a job completed in UTC.
- **Source Unique ID** - the unique identifier for the record in the source that caused an error.
- **Error** - a brief description of the error that occurred.
- **Timestamp** - the date and time that a job error occurred in UTC.
- **Error Type** - indicates whether the error occurred at the job or item level.
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