

Transitioning from Relativity Server to RelativityOne

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Transitioning from Relativity Server to RelativityOne

RelativityOne has notable differences and enhancements compared to Relativity Server, ranging from enhanced administrative functions, additional products and functionality, and improvements to end-user workflows. Depending on your typical role, use the topics below to learn more about the differences between Relativity Server and RelativityOne, and the unique features only available in RelativityOne:

- [Transitioning from Relativity Server to RelativityOne: Administrators](#)
- [Transitioning from Relativity Server to RelativityOne: Users](#)

Note: The self-paced Relativity Learning course [Transitioning from Relativity Server to RelativityOne](#) describes important workflow changes when transitioning from Relativity Server to RelativityOne, including workflows for Import/Export, Review Center, Processing, Automated workflows, and other features introduced in RelativityOne. Whilst this course is primarily focused toward users such as Reviewers, we strongly recommend reviewing the course content to become familiar with RelativityOne.

Transitioning from Relativity Server to RelativityOne: Users

This topic provides resources for users who are moving from Relativity Server to RelativityOne. It includes links to information on data ingestion, processing, review, production, and information on additional products and tools in RelativityOne.

General resources

Use the following resources to quickly get familiar with RelativityOne:

- Relativity Learning
 - The self-paced Relativity Learning course [Transitioning from Relativity Server to RelativityOne](#) describes important workflow changes when transitioning from Relativity Server to RelativityOne, including workflows for Import/Export, Review Center, Processing, Automated workflows, and other features introduced in RelativityOne.
- Quick reference guides
 - The [Quick reference guides](#) are useful when learning how to interact with RelativityOne, particularly if you are coming from a Server environment with different user interfaces.
- AI Help Chatbot
 - The [AI Help Chatbot](#) provides conversational assistance while using RelativityOne, without having to search or browse the product documentation or Knowledge Base.

Expanded functionality

RelativityOne offers additional products not available in Relativity Server. These products extend the platform's capabilities, providing even more functionality and streamlining workflows (some require additional subscriptions, contracts, or fees).

- [Data Breach Response](#) is an AI-powered solution used to reduce the time, cost, and risk to produce an entity notification list following a data breach incident.
- [Contracts](#) is a contract review solution that helps legal teams transform existing executed agreements into structured data to address a variety of use cases, ranging from corporate transactions to regulatory responses.
- With [Translate](#) you can translate sets of documents or single documents from one [language](#) to another for search and review.
- The Relativity aiR suite of products leverages artificial intelligence to support your workflows in RelativityOne. These products include:
 - [aiR for Review](#) streamlines the review process by using generative AI to both predict coding decisions and to support those predictions with descriptive text and document excerpts which explain the decisions.
 - [aiR for Privilege](#) uses generative AI, large language models, natural language processing, machine learning, and social network graphs to analyze documents and predict whether they are privileged or not and create a draft privilege log description. This streamlines privilege review, improves the accuracy of your final privilege calls, and reduces overhead when creating a privilege log.
 - [aiR for Case Strategy](#) enables you to generate facts automatically from key documents, get customizable document summaries, and use large sets of these facts to craft witness summaries and deposition outlines to prepare for interviewing individuals.

Data ingestion

RelativityOne has some different mechanisms to ingest data, for example:

- The browser-based [Import/Export](#) feature is the recommended tool to use for data transfer (importing or exporting data) from RelativityOne.
- [Collect](#) allows you to collect and import data from various data sources, such as Bloomberg, Box, Google Workspace, iManage, Microsoft 365, Refinitiv Eikon, Slack, and more.
 - For certain data sources in Collect, you can automatically convert chat data to [Relativity Short Message Format](#) (RSMF) files for processing into Relativity.

Processing

Processing in RelativityOne has some additional capabilities not available in Relativity Server, such as:

- You can [process native Slack and Microsoft Teams data](#) without needing to convert the data to RSMF prior to processing, saving time and avoiding the need for third-party solutions.
- Use the [roll up image text](#) processing profile setting to save on hosting fees and reduce document counts, while keeping the maximum amount of searchable text for review.
- You can [download and replace errored files](#) from processing in bulk, saving time and effort when resolving processing errors by replacing files.

Review

Use the available features and products in RelativityOne to streamline your review process.

- [Review Center](#) is a centralized review experience that helps you build custom queues, use AI to prioritize relevant documents, and leverage a rich reporting dashboard to understand the state of your data and track productivity.
 - Note that Active Learning is deprecated RelativityOne. Use Review Center instead of Active Learning when creating new projects.
- [Automated workflows](#) enable you to automate tasks in workspaces that previously required manual actions to complete.
- [Early Case Assessment](#) workflows and the [ECA Template](#) provides a streamlined workflow to cull unwanted data and find unique information and insights.
- [Sentiment Analysis](#) is an artificial intelligence tool that scores documents on the likelihood that they contain negativity, anger, desire, or other emotions. Through this analysis, you can quickly and easily locate documents that show unusual or highly charged interactions between participants.

Production

- Use [Redact](#) to apply markups to imaged documents, spreadsheet files, and PDF files either manually or automatically as part of a project.

Transitioning from Relativity Server to RelativityOne: Administrators

This topic provides resources for administrators who are moving from Relativity Server to RelativityOne. It includes links to vital information on the configuration, maintenance and other administrative tasks relevant to you as you move to RelativityOne.

Get started with RelativityOne

Start here to learn how RelativityOne differs from Relativity Server from an administrator's perspective:

Understand how Relativity updates features and products in RelativityOne	<ul style="list-style-type: none">• Relativity handles all software updates and patches for RelativityOne environments. You no longer need to perform manual installations, apply fixes, or install updates.• Review the RelativityOne Release Process for information on how Relativity releases updates and upgrades.• Bookmark Release Notes and What's New for information on new features, enhancements, and fixes released to RelativityOne environments.
Understand RelativityOne Data Transfer options and when to use them	<ul style="list-style-type: none">• Import/Export is the recommended method for importing and exporting data for RelativityOne. You no longer need to manage installations of RDC, and keep versions up to date - likewise, everything can now be managed in the browser, instead of having to have multiple instances of a transfer tool open at once time.• Relativity Desktop Client (RDC) is no longer needed because Relativity One's cloud-based architecture and improved data transfer methods, with advanced storage mechanisms for unstructured data, offer greater scalability and better performance for data transfer. See the RDC Deprecation article for details and frequently-asked questions if you are accustomed to RDC.• Review Data transfer best practices to understand the recommended data transfer approach for specific scenarios.• The Data Management Ask the Expert: Strategies for RelativityOne session recording provides an overview of data management strategies to help your environment operate optimally.
Install Automated Workflows to your templates and add to all active migrated workspaces	<ul style="list-style-type: none">• Automated Workflows allow you to standardize workflow processes with your data, to ensure consistent outcomes, and without requiring manual steps at all hours of every day. The system can be setup with templates, or ad-hoc processes, and has granular notification process, so you can be alerted to what's happening, without having to be at your computer or even logged in.• Review the learning module Relativity Server to RelativityOne Foundations: Automated Workflows for an introduction to Automated Workflows.• Read the Automated Workflows documentation to learn more about creating and managing Automated Workflows.
Use the Support Form to log product support requests	<ul style="list-style-type: none">• Review the Working with Relativity Product Support session to learn how best to work with our support teams for rapid issue resolution.• To log a ticket with Support, please use the Contact Support page.

Leverage features and products exclusive to RelativityOne	<ul style="list-style-type: none"> • Harness the streamlined power of AI in the cloud with RelativityOne, to provide the most value to your customers with the most consistent and sustainable products. • Transform review, privilege, and case strategy with Relativity's suite of AI-powered aiR products such as aiR for Review, aiR for Privilege, and aiR for Case Strategy. • Enable additional products such as Data Breach Response, Contracts, and Translate to unlock efficiencies and empower users. • The self-paced Relativity Learning course Transitioning from Relativity Server to RelativityOne describes important workflow changes between Relativity Server to RelativityOne.
Secure your environment with Lockbox and Security Center	<ul style="list-style-type: none"> • Take advantage of RelativityOne's built-in security features and a team of security experts at Relativity to support you. • Review the whitepaper at Relativity Trust: Understanding Security in RelativityOne for a high-level overview of Relativity's approach to secure your data and environment in RelativityOne. • Understand how to use the Lockbox feature to secure workspaces. • Review the Security Center Ask the Expert session recording for an overview of Security Center and how best to use it.

Maintenance and upgrades

RelativityOne is a cloud-native solution, meaning it operates entirely in the cloud. This eliminates the need for on-premises hardware and infrastructure.

Cloud-based infrastructure and managed environments	<ul style="list-style-type: none"> • You no longer need to plan for system prerequisites and requirements for Relativity, apart from requirements for optional client-side tools such as Express Transfer. • You do not need to install or configure servers for specific roles such as worker servers, agents servers or web servers. • Storage is automatically scaled, and you no longer need to add or manage additional File servers to handle spikes in data usage. • Relativity manages troubleshooting and infrastructure management for RelativityOne environments. • Tasks related to network configuration, storage management, and database maintenance are managed by Relativity. <ul style="list-style-type: none"> • You may need to open ports to support data transfer tools. See the article at Data Transfer Tools: Required Port Considerations for RelativityOne for more information. • Automated backup and disaster recovery processes are integrated into RelativityOne, reducing the need for manual intervention and the need to maintain and test your own backup and disaster recovery procedures. • RelativityOne performs automatic scaling, allowing it to handle varying workloads without manual intervention. You do not need to plan for additional hardware or resources to handle spikes in usage. • To log a ticket with Support, please use the Support Form.
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Releases and updates	<ul style="list-style-type: none"> • There are scheduled downtime windows for certain system maintenance or upgrade operations that require environments to be offline. • You can refer to the Release Notes and What's New topics for information on new features, enhancements, and fixes released to RelativityOne environments.
Agents	<ul style="list-style-type: none"> • Agents are managed automatically by Relativity, reducing the need for manual intervention. • You no longer need to install or configure Agents on the server. • Agents in RelativityOne can scale automatically based on workload demand. • You no longer need to manage resource pools to ensure that agents are properly allocated to handle various tasks, nor do you need to perform any manual tuning to optimize for agents.

Security

Security is paramount in RelativityOne. Tools and guidance are available to help you ensure that your data and workspaces are secured.

Workspace security	<ul style="list-style-type: none"> • The Case Administration Foundations: Setting Workspace Security and Permissions self-paced learning course provides more details on security options in RelativityOne, including Security Center, Client Domains, Lockbox, and object- and item-level permissions.
Feature permissions	<ul style="list-style-type: none"> • Feature permissions significantly simplify permission configuration by allowing you to set permissions based on features, rather than managing specific permissions by navigating through the Object Security, Tab Visibility, and Admin Operations tabs individually.
Lockbox	<ul style="list-style-type: none"> • The Lockbox feature prevents administrators (Relativity teams included) from accessing workspace data, unless they are explicitly granted access. <ul style="list-style-type: none"> • Lockbox is enabled by default in RelativityOne. • System administrators must also belong to a group within a workspace to access that workspace, or to administer security within that workspace.
Security Center	<ul style="list-style-type: none"> • Security Center allows you to set up various security mechanisms and monitor for threats. This includes two-factor authentication, login locations, user activity, Lockbox access, threat intel and more. See the Security Center Ask the Expert recording for an overview of Security Center and how best to use it.
Client domains	<ul style="list-style-type: none"> • Use Client Domains to securely isolate users, workspaces, groups, and matters by clients, providing them permissions to perform common administrative tasks within their own client domain but limiting their visibility into the Relativity environment as a whole.

Security best practices	<ul style="list-style-type: none"> • Always preview the security of a group or a user added to Relativity. • Follow the Principle of Least Privilege when assigning permissions. • Use the Disable On Date field to auto-disable temporary users. • Review the Security Best Practices topic and the information in the Security Configurations tab of Security Center to align with various security best practices. • Use Feature permissions to simplify setting permissions in RelativityOne. • Use Security Center daily to monitor login activity, threat reports, and security alerts and keep your data secure. • Workspaces with sensitive data should have a generic name. • Develop a naming convention for groups, workspaces, clients, matters, for example: <i>Review - Smith Matter; Investigation – 2023.001.</i>
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Cost management

A variety of flexible and customizable options exist, to allow you to manage your business in RelativityOne, and provide the right level of reporting and visibility to your customers.

Management Console	<ul style="list-style-type: none"> • The Management Console offers a variety of reports to provide general oversight and statistics across the instance, particularly focusing on cost and usage.
Cost Explorer	<ul style="list-style-type: none"> • Cost Explorer provides key data related to the instance's cost, broken down by client, matter, and workspace levels. It also displays important cost information on Staging consumption and users.
Staging reports	<ul style="list-style-type: none"> • Staging Reports can be generated across the instance's Staging areas to aid in end-client billing, reporting, and data validation, while also offering general oversight of Staging usage.
Usage reports	<ul style="list-style-type: none"> • Usage Reports delivers key metrics from across your instance, offering insights into platform usage. These reports can be used for end-client billing metrics or tracking product usage.
Cost management best practices	<ul style="list-style-type: none"> • Review the cost reports in Management Console regularly to identify potential cost implications and take remedial action if needed.

Data transfer and data management

RelativityOne provides a suite of tools to load data into an environment or move case data from one environment to another environment. Guidance and tools are also available to manage your data efficiently.

Transferring data	<ul style="list-style-type: none"> • The Data migration topic describes how to migrate data from Relativity Server to RelativityOne. • Import/Export is the recommended method for importing and exporting data for RelativityOne. The Import/Export Foundations: Comprehensive Overview learning course provides in-depth information on using the Import/Export application. <ul style="list-style-type: none"> • Express transfer is an optional but recommended component when using Import/Export, particularly when working with large data files. • RelativityOne Staging Explorer (ROSE) enables you to rapidly transfer large amounts of data to and from RelativityOne via a staging storage area. The Staging Area is a storage area where you can upload, manipulate, and organize your data before processing and importing it into RelativityOne. This area is separate from where your workspace data and RelativityOne system data resides. • Simple File Upload (formerly Single File Upload) gives users the ability to add new documents to Relativity. • Thanks to the improved data transfer capabilities in Import/Export, the Relativity Desktop Client (RDC) is no longer needed or available for RelativityOne. You can use Import/Export for all RelativityOne importing and exporting workflows. • You no longer need to use Relativity Processing Console (RPC) to manage processing jobs. Instead, you can manage and administer Processing jobs through your browser.
Data transfer best practices	<p>Determine which data transfer tool is the best one for the job:</p> <ul style="list-style-type: none"> • Import/Export: use this to upload structured and unstructured data. This is the fastest tool for loading data to RelativityOne. • Import/Export with Express Transfer: use this for large Import/Export jobs, such as data files larger than 20GB. You can use Import/Export with or without activating Express Transfer, however, we recommend activating Express Transfer. • Simple File Upload: fast and you're in a hurry and aren't concerned about metadata extraction. • RelativityOne Staging Explorer: use this to upload files to your RelativityOne staging directory, or to download files from your RelativityOne storage location to a local computer.
Managing data	<ul style="list-style-type: none"> • Review the Data Management topic for comparisons between data management tools and data management guidance. • You can use the repository workspace application to convert a workspace into a more streamlined and cost-effective version for performing early case assessment (ECA) on processed data. • Use Integration Points to transfer/promote data from one workspace to another workspace. • You can move inactive workspaces to Cold Storage to store workspaces that are not actively being worked on. • Use the ARM application to archive and restore Relativity workspaces. • The Recycle Bin allows you to recover deleted workspaces within a specified time-frame.

Data management best practices	<ul style="list-style-type: none"> • Develop good data management practices for staging areas. Data and ARM archives that are no longer needed should be deleted on a regular basis. • Follow the Early Case Assessment workflow when culling large data sets to review. For smaller review or investigations the direct to review workspace is the better option. • Set up a reminder one week before the end of each month to review workspaces and make any needed changes such as moving workspaces to cold storage or deleting unused workspaces. • Develop a retention policy for moving workspaces to Cold Storage or ARM. <ul style="list-style-type: none"> • Cold Storage: used when a workspace is temporarily inactive, and access is not a priority. • ARM and ROSE: use ARM to archive a workspace and ROSE to download it to local storage.
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Environment administration, instance settings, and tab visibility

To help ensure system reliability and performance, you no longer need to maintain or adjust Instance Settings. These settings and visibility are now managed by Relativity.

Instance settings	<ul style="list-style-type: none"> • Instance Settings are not documented for RelativityOne. If you do need to make changes to Instance Settings, please log a ticket with Product Support.
Instance objects	<p>The following objects are secured by default and should not be modified. Please contact product support if you need to modify these objects:</p> <ul style="list-style-type: none"> • Agent - access to the Agents tab. • Agent Type - access to the Agent Types page when creating a new agent. • Choice - access to the Choice tab. • Error - access to the Errors tab. (In 2025, Relativity is deprecating the (Admin) Errors tab in RelativityOne, to make it easier to address job-specific errors as they occur at their source within your workspaces. For more details, see Errors tab deprecation.) • License - access to the License tab. Only full system administrators can edit license information. • Resource File - access to the Resource files tab. • Resource Pool - access to the Resource pools tab. • Servers - access to the Servers tab. • If you see the Workspace Processing Settings item listed in the object security section of your console, note that this represents an RDO for which there is no front-end implementation. It stores the Invariant StoreID and Data Grid settings for the workspace, but it provides no functionality, and it controls nothing.

Instance tabs	<p>The following tabs are secured by default and should not be modified. Please contact product support if you need to modify these tabs:</p> <ul style="list-style-type: none"> • Choices - visibility of the Choices sub-tab. • Resource Files - visibility of the Resource Files sub-tab. • License - visibility of the License sub-tab. Only full system administrators can edit license information. • Instance Settings - visibility of the Instance Settings sub-tab. • Servers - visibility of the Servers tab and sub-tabs such as Worker Servers. • Agents - visibility of the Agents tab. • Resource Pools - visibility of the Resource Pools tab. • Performance Dashboard - visibility of the Performance Dashboard tab. • Application Performance - visibility of the Application Performance sub-tab. • Server Health - visibility of the Server Health sub-tab. • Queue Management – visibility of the Workspace Upgrade Queue sub-tab.
Instance administration operations	<p>The following administrative operations are secured by default and should not be modified. Please contact product support if you need to access this functionality:</p> <ul style="list-style-type: none"> • Agent Operations - access to agent operations.
Workspace objects	<p>The following objects are secured by default and should not be modified. Please contact product support if you need to modify these objects:</p> <ul style="list-style-type: none"> • Agent Type • Event Handler • Install Event Handler - viewing, adding, or deleting event handlers requires access to the Object Type tab. • Processing Error
Workspace tabs	<p>The following tabs are secured by default and should not be modified. Please contact product support if you need modify these tabs:</p> <ul style="list-style-type: none"> • Worker Status • Processing > Errors. See Processing exception and error overview for details on error details for processing in RelativityOne.
AI help	<ul style="list-style-type: none"> • The AI Help Chatbot provides conversational assistance while using RelativityOne, without having to search or browse the Documentation or Knowledge Base. You can control which users have access to the ChatBot.

Applications, custom applications, and scripts

Standard and custom applications are supported in RelativityOne.

Standard and custom applications	<ul style="list-style-type: none"> • See Relativity applications for details on standard and custom applications in RelativityOne.
Upgrading applications	<ul style="list-style-type: none"> • The Upgrading applications topic describes how you can update applications in RelativityOne when needed.

Installing complex custom applications	<ul style="list-style-type: none"> The Relativity Application Library tab is hidden but accessible via Quick Nav to system administrators. While system administrators can add custom applications, we prefer that you request complex applications through Product Support so that we can verify infrastructure, scale agents and servers, or ensure compatibility with RelativityOne.
Custom scripts	<ul style="list-style-type: none"> The Relativity Script Library tab is available, but there is an instance setting preventing system administrators from adding a custom script. We prefer that you reach out to Product Support to add custom scripts to your instance.

What is still the same?

While there are notable differences between Relativity Server and RelativityOne as described above, from an administration perspective several feature and actions are the same. For example, you can still:

- Manage clients, groups, matters, tabs, users, workspaces, workspace permissions, and workspace views.
- Install standard applications that ship with Relativity from the Application Library.
- Install simple custom Relativity applications such as objects and layouts if you are a system administrator in Relativity. By default the first user created in a RelativityOne environment is a system administrator.
- Install and run standard Relativity scripts from the Script Library.
- View queues and manage jobs and you can change the priority of jobs in those queues if needed, for example Branding, Production, OCR, and Worker Management.
- View, message, and force logout of users through the User Status tab.
- View audit history.

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