Relativity Collect - Google Workspace

March 12, 2024

For the most recent version of this document, visit our **documentation website**.

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1 Collect

Collect is an easy-to-use application for collecting your custodian's data through different sources. Start by setting up Collect as an application within your data source. For information on registering an app, see the source's documentation on their website. Once registered, start adding custodians, data sources, and targets to Collect. Once connected, start the collect job and begin collecting data from custodians.

Note: This document covers the Google Workspace source.

- **Google Workspace**—collect documents from Chat, Drive, Gmail, and Groups. You can also collect files directly into RelativityOne Government. A license for Vault is required to collect data from Google Workspace. For more information, see Google's Vault Help documentation.. Google Chat is collected as RSMF files. For more information on short messages, see the Relativity User site.This data source requires application setup before you can add it as a data source in Collect. For more information, see Google Workspace account setup on page 15.

2 Installing Collect

You can install Collect in a workspace by using the functionality available through the Application Deployment System (ADS). This system provides you with the option to install Collect by selecting it from the list of existing applications in the Application Library tab or by importing it from an external application file.

To install Collect, install Collect from the Application Library tab and, if required, enable access for the data source.

Confirm that you have the appropriate system admin permissions to install an application. For more information, see Workspace security on the RelativityOne documentation site.

2.1 System requirements for Collect

Collect uses the ADS framework, so you install it as an application within a Relativity instance. Consequently, Collect has the same system requirements as RelativityOne. For RelativityOne's system requirements, see System Requirements on the RelativityOne Documentation site.

2.2 Installing Collect

Collect is compatible with RelativityOne. See Getting started in RelativityOne on the Documentation site for requirements.

For a Collect-only installation, you do not need the following pre-requisities:

- Analytics server setup
- Database server for processing or native imaging
- Worker server for processing or native imaging
- Obtaining applications for native imaging and processing

Because Collect uses the ADS framework, you can install through the Relativity Application tab from the library. See Installing Collect from the application library below.

Note: You configure security permissions on Collect just as you would for any other Relativity application. For more information, see Workspace security on the RelativityOne documentation site.

2.2.1 Installing Collect from the application library

If Collect is in the application library, you can install it to the current workspace. Confirm that you have the appropriate system admin permissions to install an application. For more information, see Workspace security on the RelativityOne Documentation site.

Note: Analytics, Case Dynamics, Collect, Legal Hold, and Processing all share the Entity object. You may be prompted to complete additional steps to unlock and resolve conflicts of the listed applications in order to complete installation. For information, see Troubleshooting application installation errors on the RelativityOne documentation site.

Use the following procedure to install Collect from the application library:

1. Navigate to the workspace where you want to install the application.
2. Navigate to the **Application Admin** tab.
3. Click **New Relativity Application** to display an application form.
4. Click the **Select from Application Library** radio button in the Application Type section.
5. Click ... in the **Choose from Application Library** field.
6. Select Collect on the Select Library Application dialog. This dialog only displays applications added to the Application Library. If Collect is not included in the list, see the Installing applications topic.
7. Click **Ok** to display the application in the **Choose from Application Library** field. The application form also displays the following fields:
   - **Version**—displays the version of the application that you are installing.
   - **User-friendly URL**—displays a user-friendly version of the application's URL. This field may be blank.
   - **Application Artifacts**—displays object types and other application components.
   - **Map Fields**—there are no fields available in Collect for mapping.
8. Click **Import** to install Collect into the workspace.
9. Review the import status of the application. Verify that the install was successful or resolve errors.

2.3 Permissions to run Collect

The following security permissions are required to run and complete the collection process:

Object Security	Tab Visibility	Other Settings
▪ **Collection** – View, Edit, Add ▪ **Collection Detail Custodian** – View, Edit, Add ▪ **Collection Detail Custodian Target** – View, Edit, Add ▪ **Collection Detail Custodian Target Result** – View, Edit, Add ▪ **Collection Detail Request** – View, Edit, Add ▪ **Collection Detail Source Instance** – View, Edit, Add ▪ **Collection Detail Source Type** – View, Edit, Add ▪ **Collection Detail Summary** – View, Edit, Add ▪ **Collection Matter** – View, Edit, Add ▪ **Collection Source Instance** – View, Edit, Add ▪ **Collection Source Instance Parameter** – View, Edit, Add	▪ **Entities** ▪ **Collect** ◦ Matters ◦ Custodian Targets ◦ Collections ◦ Status Summary ◦ Target Status ◦ Collection Admin ◦ Monitor	▪ None

Object Security	Tab Visibility	Other Settings
■ **Collection Source Type** – View, Edit, Add ■ **Collection Source Type Parameter Type** – View, Edit, Add ■ **Collection Source Type Criteria** – View, Edit, Add ■ **Custodian Target** – View, Edit, Add ■ **Entity** – View, Edit, Add ■ **Custom** – View, Edit, Add		

3 Matters

In Collect, a matter represents a legal action or case requiring you to collect electronic data from sources such as Google Workspace. Matters can be used to group multiple related collection jobs.

You manage matters that are associated with a collection. You can create each of these items on their respective tabs, or you can create them when you add a new collection.

Note: Matters created from Home aren't available for use in Collect nor listed on the Matters tab in this application. Additionally, the matters created on this tab are only available for use in Collect.

3.1 Creating a matter

Use the following procedure to create a matter that you can associate with a collection:

1. Navigate to the Matters tab. Collect displays a list of the active matters currently available to this application.
2. Click **New Collection Matter**.
3. Complete the fields in the Matter Details layout. See Matter Details layout fields below.
4. Click **Save**. Collect displays the matter details. See Viewing or editing matter details on the next page.

You can also create a matter when you add a new collection. Click the **Add** link next to the Matter field in the Collection layout. See Creating a collection on page 36.

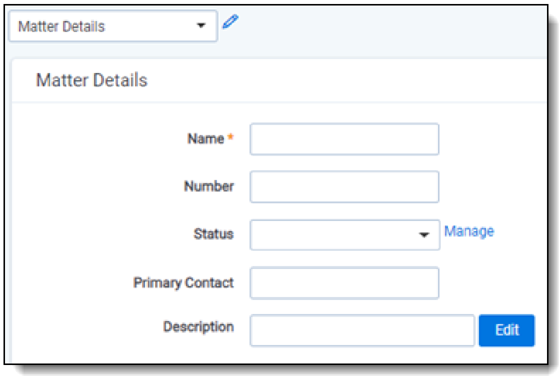
3.2 Matter Details layout fields

The Matter Details layout contains the following fields:

- **Name**—the name of the matter.
- **Number**—the number you assign to the matter for reporting purposes.
- **Status**—the status you assign to the matter for reporting purposes. Select an existing status from the drop-down menu or click **Add** to define a new one. Existing statuses include **Active** and **Closed**.

  Note: Assigning a status of Closed to a matter hides it from the Active Collect view on the Collect tab.

- **Primary Contact**—the name of an individual who handles communications related to the matter.
- **Description**—the description of the matter used for reporting purposes. Click **Edit** to display an HTML text editor where you can enter the description.



3.3 Viewing or editing matter details

Display the matter details by clicking the name of a matter on the Matters tab. Collect also displays these details immediately after you add a new matter. You can use the buttons at the top of the page to edit, delete, or perform other tasks with the matter.

The details page includes the following sections:

- **Matters Details**—lists the name, number, status, primary contact and description of the matter.
- **Collect**—lists all collections associated with the matter. You can also perform the following tasks in this section:
    - **Associate the matter with a new collection**—to create a new collection, click **New**. See Creating a collection on page 36.
    - **Remove a collection from Relativity**—click **Delete** to display a pop-up window. To view child objects and associated objects, click **Dependencies**.
    - **Modify collection details**—click the **Edit** link for a collection. To modify the matter, click the **Edit** button at the top of the page.
    - **Display the collection details**—click the name of the collection.

4 Custodian targets

In Collect, you manage custodians that have an associated data source. The custodian target is the combination of a custodian and data source. It is an endpoint from which Collect can connect to and collect from. For example, a custodian's Google Workspace Gmail account is a custodian target.

To collect from custodians, entities either have to exist, be created, or be imported in Relativity. The custodian and their primary email address also needs to be associated to the data source. When the primary email address field for a custodian is present, Collect will auto-generate the required targets for each data source while setting up a collection job.

In this document, the source is Google Workspace.

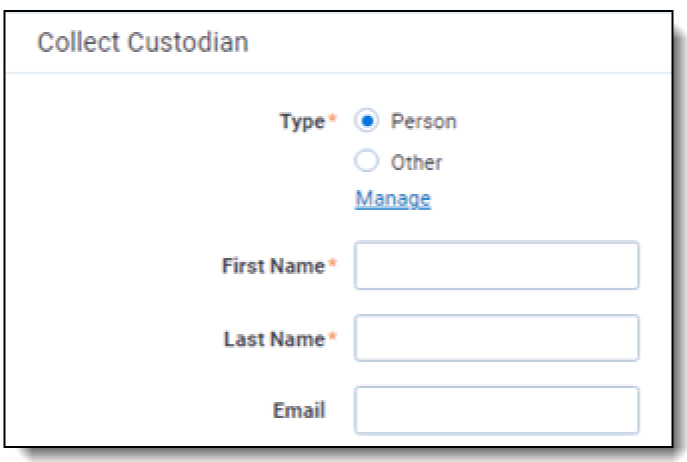
4.1 Custodians

If a custodian does not exist, you can manually create an entity from the Entities tab. Once you create an entity in the Collect Custodian view and add it to a collect project, it becomes a custodian.

You can add custodians to Collect at different times throughout the collection process. There are different ways to populate the entity list including using Integration Points, Import/Export, or manually. For more information, see Integration Points and Import/Export. To manually create a new custodian, follow the steps below:

1. Navigate to the **Entities** tab.
2. Click **New Entity** on the Custodians tab.
3. Select the **Collection History** layout from the drop-down menu and complete the fields. See Fields on the next page.
4. Click **Save**.

Note: When creating a custodian from Legal Hold, the **Custodians - Legal Hold View** is selected by default. If Collection or Processing is also installed in the same workspace, you can view the **Custodians - Processing View** or **Custodians - Collection View** accordingly.



4.2 Fields

The Collection Custodian layout provides the following fields:

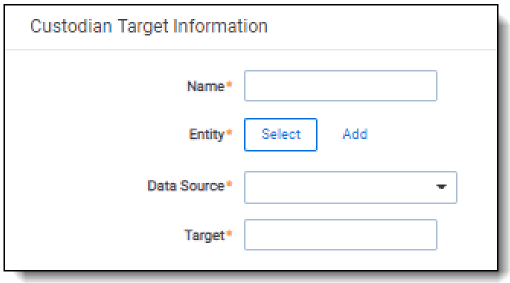
- **Custodian Type**—select one of the following:
  - **Person**—select this to enter first and last name of the individual acting as custodian of the data you wish to process.
  - **Other**—select this if the custodian of the data you wish to process is not an individual but is, for example, just a company name. You can also select this if you wish to enter an individual's full name without having that name include a comma once you export the data associated with it. Selecting this changes the Custodian layout to remove the required First Name and Last Name fields and instead presents a required Full Name field.
- **First Name**—the first name of the custodian. This field is only available if you've set the Custodian Type above to Person.
- **Last Name**—the last name of the custodian. This field is only available if you've set the Custodian Type above to Person.
- **Full Name**—the full name of the custodian of the data you wish to process. This field is only available if you've set the Custodian Type above to Entity. When you enter the full name of an entity, that name does not contain a comma when you export the data associated with it.
- **Email**—the email the custodian uses in the target. This email address must match the email address within the connected data source.

4.3 Creating a custodian target

You can collect electronic data from custodians who are individuals or entities involved in a legal action or case. You can collect electronic data for custodians from their computers, external hard drives, network drives, and other sources. You may perform multiple collections from a single custodian. On the Custodians tab, you can create and edit custodians as well as view their details, associate them with collections, and perform other tasks.

Use the following procedure to create a custodian target that you can associate with a collection:

1. Enter the **Name** of the custodian target.
2. Click **Select** to select available custodians. If the custodian does not exist, click **Add** and complete additional steps.
3. Click the **Data Source** drop-down menu to select a data source. For more information Collection data sources, see Data source types on page 14.
4. Enter the custodian's email address in the **Target** field.



To avoid duplicate custodians, a custodian with multiple emails, you will need to link a second custodian target to the same entity. To make a second custodian target for the same entity, you will need to create another target.

In the target, select the same entity. Then, select the other data source and enter the target value. This way you can have multiple targets, different from the primary email address, for a single entity record.

4.3.1 Generating targets in the wizard

Custodian Targets can also be automatically generated in Step 4 of the Collect wizard. Click **Generate Targets** to check if targets exist for the custodians you've selected for collection. If the targets do not exist, Collect creates them based on the email address in the Entity details in each custodian. For more information, see Collection Summary on page 39.

If an invalid custodian target is created manually, the auto-generation of custodian targets does not remove the invalid custodian target. The invalid custodian target needs to be removed manually. Find out if there are any errored targets in the Collection Summary step or on the Status Summary tab. To delete a custodian target from the Custodians Targets tab, click the data sources checkbox and use the Delete mass operation.

4.4 Removing custodian targets

To remove any custodian target, the custodian first needs to be removed from the collection, or collections. You can use the Mass delete operation to delete collect custodians, also known as entities. For more information, see the Admin Guide.

Trying to delete a custodian target before removing a custodian will result in an error.

5 Data sources

A data source allows you to define where and how you pull data from a communication channel. A data source stores the configuration necessary to retrieve data from a communication channel, process that data, and ingest it into Collect.

Set up workspace data sources before beginning collections. Data sources are stores of information from which you collect data. These data sources have parameters that you can set during the creation of a collection job.

5.1 Creating a collect data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. Setup only needs to be done once for each data source. You must create your data sources prior to setting up your custodian targets. For more information, see Custodian targets on page 11.

When creating data sources, you can select different types of data sources for obtaining files.

Use the following procedure to create a new Collect source instance:

On the Collect Admin page,

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select the type of data source.
4. Enter the data source-specific settings. For more information, locate your data source topic.
5. Click **Save**.

5.2 Data source types

You can select any of the following data sources for step 3 of the creating a new collection source instance process:

- **Google Workspace**—select to collect data from Google Chat, Drive, Gmail, or Groups. There is no support for modern attachments. For more information, see Google Workspace data source on the next page.

6 Google Workspace data source

This topic provides details on how to capture Google Chats, Drive, Groups, and emails with Collect. Relativity collects Google Drive data using the Vault API.

6.1 Considerations

Note the following considerations about this data source:

- Unable to collect Google Calendar data from Google Vault due to a Google limitation.
- No support for modern attachments, or linked files.
- Google does not have a date range limitation. We recommend limiting the date range of the collection. Extended date ranges can increase collection time and potentially create issues.

6.2 Google Workspace account setup

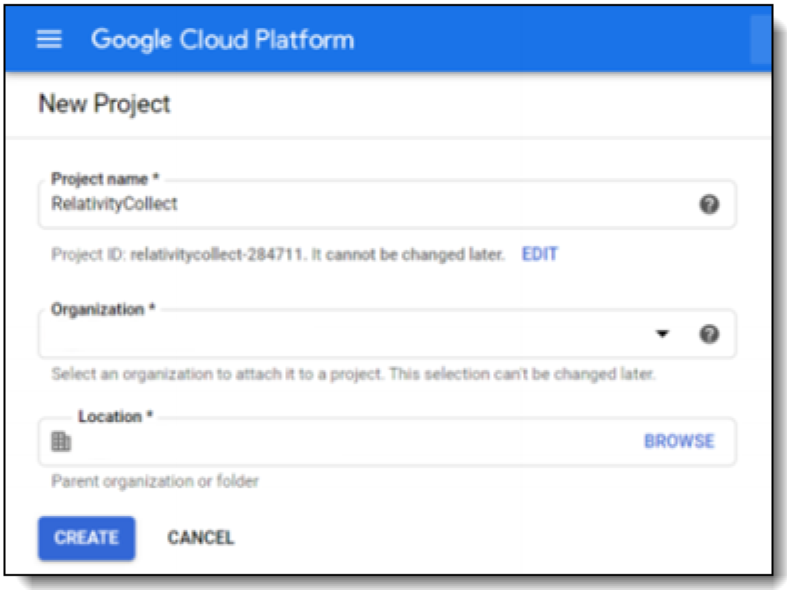
Connecting your Google Workspace to Collect takes some setup in Google and Relativity. Begin with the credential setup in Google.

6.2.1 Creating a Google Cloud project

Create a Google Cloud project to create, enable, and use all Google Cloud services. You will use this account to manage APIs.

To create a Google Cloud project,

1. Open the Cloud Resource Manage page, click **Create Project**.
2. Enter information into the fields:
    - **Project name**—enter a memorable name for your project.
    - **Organization**—enter the name of your organization.
    - **Location**—enter the parent organization or folder.
3. Click **Create**.

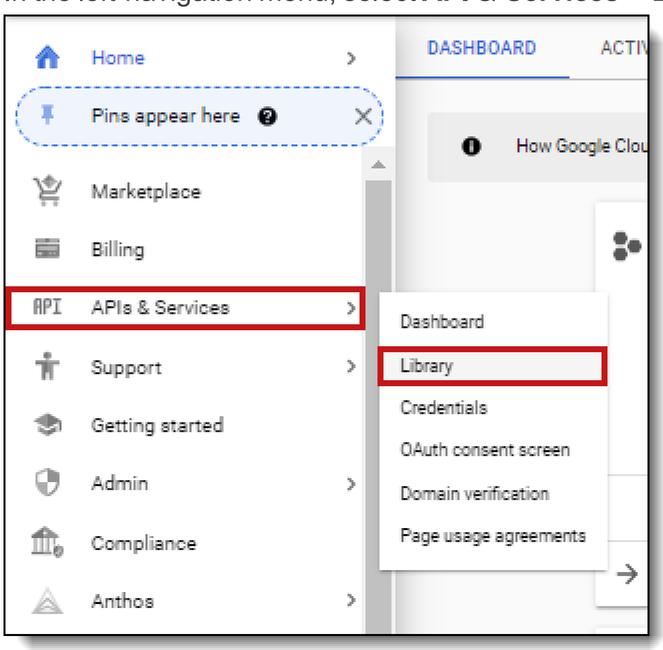


6.2.2 Enable required APIs for the Project

Continuing in this process, you now need to enable the required Google Cloud Console APIs and associate them to a new project.

To start enabling APIs,

1. In the Google Cloud Console, select the newly created project.
2. In the left-navigation menu, select **API & Services > Library**.



This will open up the Library page that includes all available APIs.

3. Enter *Google Vault API* in the search bar and search.

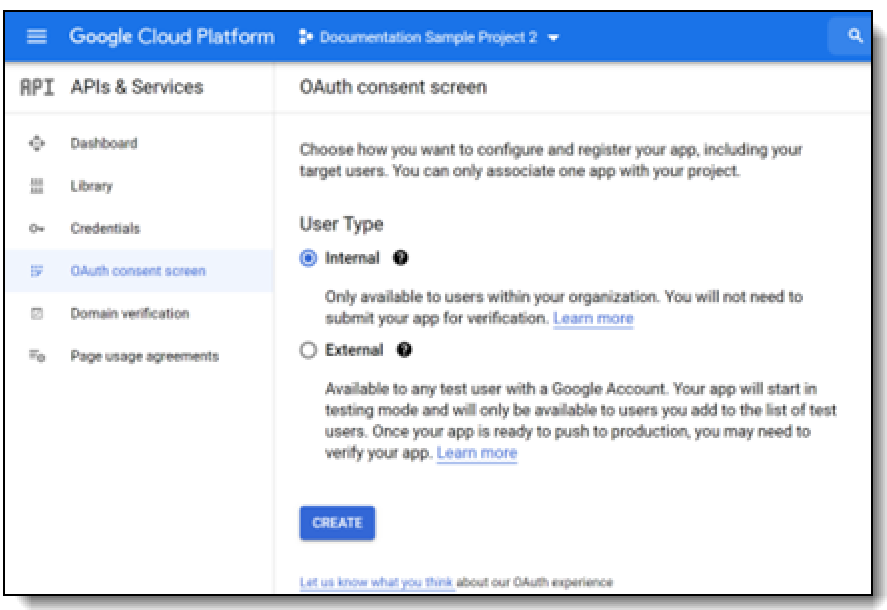
4. Click the **Google Vault API** option.
5. Click **Enable**.
6. In the top left corner, click the Back arrow icon.
   This will take you back to the search results page with the search bar.
7. Enter *Admin SDK API* in the search bar and search.
8. Click the **Admin SDK API** option.
9. Click **Enable**.
10. In the top left corner, click the Back arrow icon.
    This will take you back to the search results page with the search bar.
11. Enter *Cloud Storage API* in the search bar and search.
12. Click the **Cloud Storage API** option.
13. Click **Enable**.

    Notes: This API may be enabled by default.

6.2.3 Setup OAuth2 consent screen

Follow the steps to create a OAuth2 consent screen.

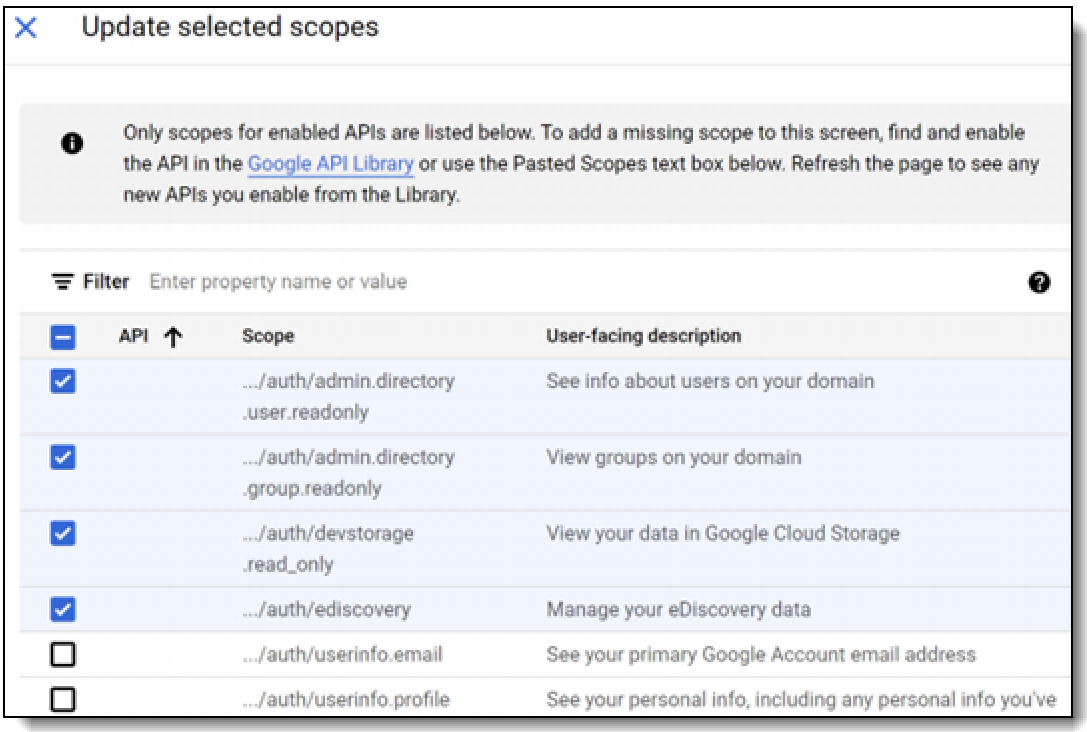
1. Open https://console.cloud.google.com/ and select newly created project.
2. Click on the Navigation menu.
3. Select **APIs & Services>OAuth consent screen**.
4. Select **Internal** type.
5. Click **Create**.



6. Enter descriptive App name. For example, *Relativity Collect*.
7. Enter a **User support email** from within your organization.
8. Enter **relativity.one** as **Authorized Domain**.
9. Enter an email form within your organization in the **Developer Contact Information** field.
10. Click **Save and Continue**.

On the next step, you will want to add scopes.

1. Click **Add or remove scopes**.
2. Enter filter and select required scopes one at a time, or enter them in a text box.
   The scopes are:
   - https://www.googleapis.com/auth/ediscovery
   - https://www.googleapis.com/auth/devstorage.read_only
   - https://www.googleapis.com/auth/admin.directory.user.readonly
   - https://www.googleapis.com/auth/admin.directory.group.readonly



3. Click **Update**.
4. Click **Save and Continue**.

6.2.4 Create credentials

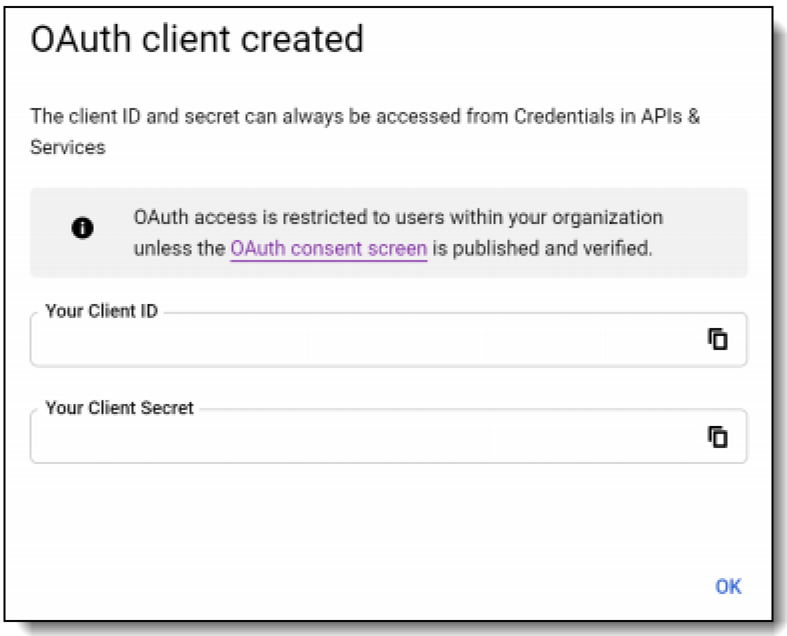
1. Click in the top left corner.
2. Hover over **APIs & Services > Credentials**.
3. Click **Create Credentials**.
4. Click **OAuth Client ID** credentials.
5. Enter the following information in the fields:
   - **Application type**—select Web application
   - **Name**—enter a name for the credentials
   - **Authorized redirect URIs**—enter the URI based on the RelativityOne Data Center Geo you intend to run collections from.

     RelativityOne Data Center Geo URIs
     - **Asia (East)**—https://services.esas.relativity.one/collect-oauth-authorization/index.html
     - **Asia (Southeast)**—https://services.seas.relativity.one/collect-oauth-authorization/index.html
     - **Australia**—https://services.auea.relativity.one/collect-oauth-authorization/index.html
     - **Brazil (South)**—https://services.brso.relativity.one/collect-oauth-authorization/index.html
     - **Canada (Central)**—https://services.cact.relativity.one/collect-oauth-authorization/index.html
     - **Europe (North)**—https://services.noeu.relativity.one/collect-oauth-authorization/index.html
     - **Europe (West)**—https://services.wseu.relativity.one/collect-oauth-authorization/index.html
     - **Germany (West Central)**—https://services.dect.relativity.one/collect-oauth-authorization/index.html
     - **India (Central)**—https://services.inct.relativity.one/collect-oauth-authorization/index.html
     - **Japan**—https://services.jpes.relativity.one/collect-oauth-authorization/index.html
     - **Korea (Central)**—https://services.krct.relativity.one/collect-oauth-authorization/index.html
     - **Switzerland**—https://services.chno.relativity.one/collect-oauth-authorization/index.html
     - **United Arab Emirates**—https://services.aeno.relativity.one/collect-oauth-authorization/index.html
     - **United Kingdom (South)**—https://services.ukso.relativity.one/collect-oauth-authorization/index.html
     - **United States (Central)**—https://services.ctus.relativity.one/collect-oauth-authorization/index.html

- **United States (East)**—the United States (East) geo has five URIs associated to the pod that you're RelativityOne tenant is assigned to. Contact Relativity Support to confirm which URI to use.
  - **RelativityOne pod esus025000**—https://services.esus.relativity.one/collect-oauth-authorization/index.html
  - **RelativityOne pod esus025064**—https://services-02.esus.relativity.one/collect-oauth-authorization/index.html
  - **RelativityOne pod esus025128**—https://services-03.esus.relativity.one/collect-oauth-authorization/index.html
  - **RelativityOne pod esus025192**—https://services-04.esus.relativity.one/collect-oauth-authorization/index.html
  - **RelativityOne pod esus008064**—https://services-05.esus.relativity.one/collect-oauth-authorization/index.html

6. Click **Create**.

After clicking Create, you will have your Client ID and Client Secret. Add them to the New Collection Source Instance.



6.2.5 Setting reauthentication policy

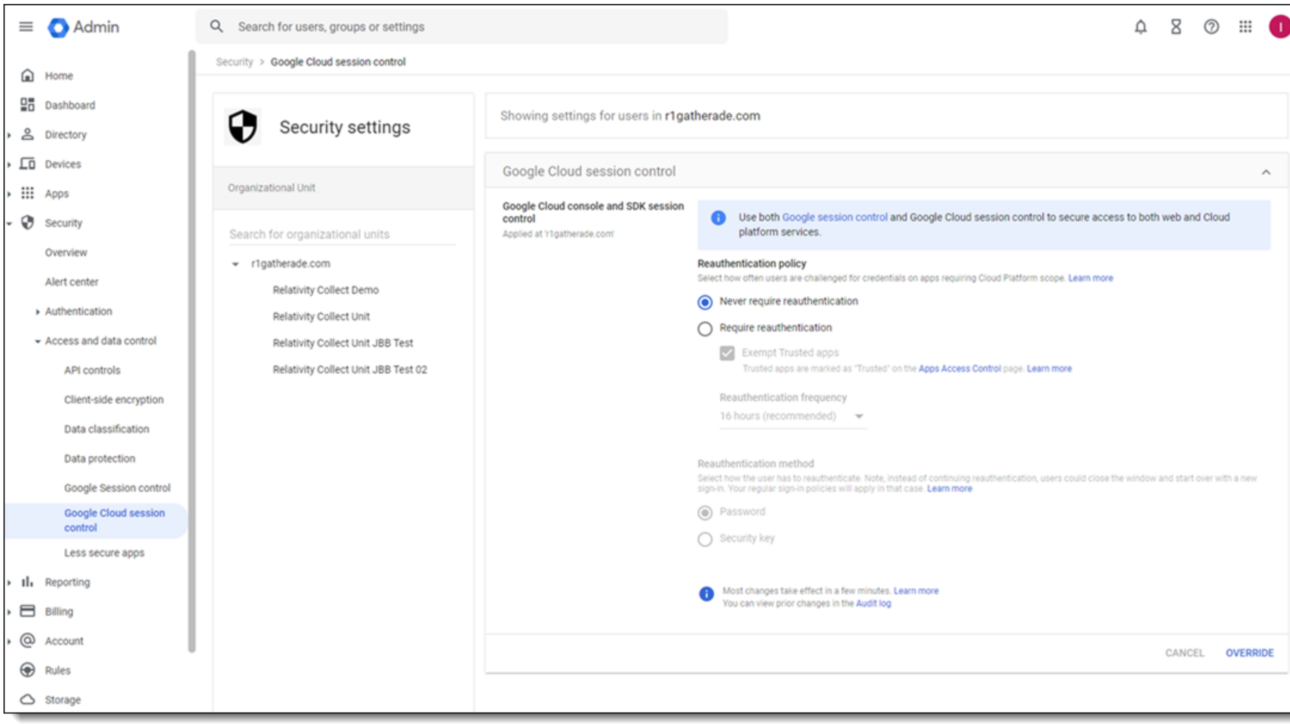
As an optional step, you will want to configure Google's reauthentication policy. To do that,

1. Open https://admin.google.com/ac/home and select newly created project.
2. Click on the Navigation menu.
3. Select **Security > Access and data control > Google Cloud session control**.
4. On the Google Cloud session control, select a reauthentication policy.

- **Never require reauthentication**
- **Require reauthentication**

Note: If you select Require authentication, you must also select **Exempt Trust apps**.

5. Click **Save**.



For more information on setting reauthentication policy and the options, see Google's documentation.

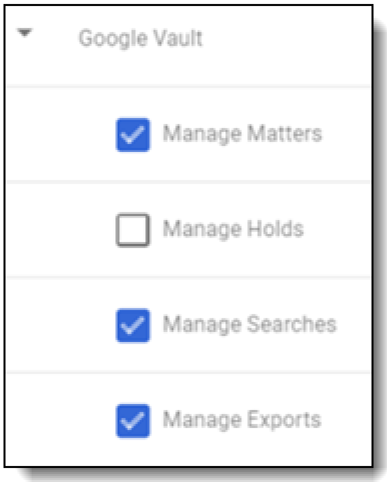
6.3 Google Workspace user account setup

Collections require user account on which behalf Relativity exports data. This can be a dedicated or an existing user account.

6.3.1 Create admin role for Vault API

1. Open https://admin.google.com/ac/home.
2. Click **Account>Admin roles** to open the up the page.
3. Click **Create New Role**.
4. Enter the role name. We recommend *Relativity Collect*.
5. Click **Continue** to select privileges.
6. Select the following privileges:

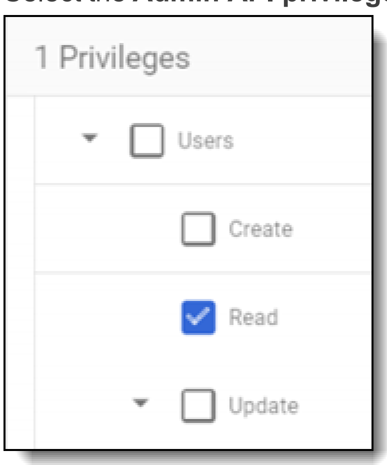
- Services - Google Vault > Manage Matters
- Services - Google Vault > Manage Searches
- Services - Google Vault > Manage Exports



7. Click **Continue**.
8. Click **Create Role**.

6.3.2 Create admin role for the user accounts listing

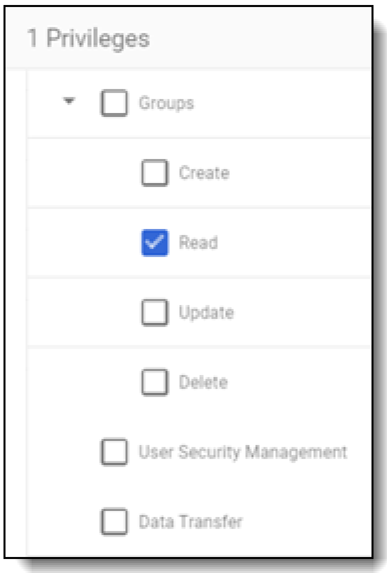
1. Open https://admin.google.com/ac/home.
2. Click **Account>Admin roles** to open the up the page.
3. Click **Create New Role**.
4. Enter the role name. We recommend *Users Reader for Collect*.
5. Click **Continue**.
6. Select the **Admin API privileges - Users > Read** privilege.



7. Click **Continue**.
8. Click **Create Role**.

6.3.3 Create admin role for the groups listing

1. Open https://admin.google.com/ac/home.
2. Click **Account>Admin roles** to open the up the page.
3. Click **Create New Role**.
4. Enter the role name. We recommend *Groups Reader for Collect*.
5. Click **Continue**.
6. Select the **Admin API privileges - Groups > Read** privilege.

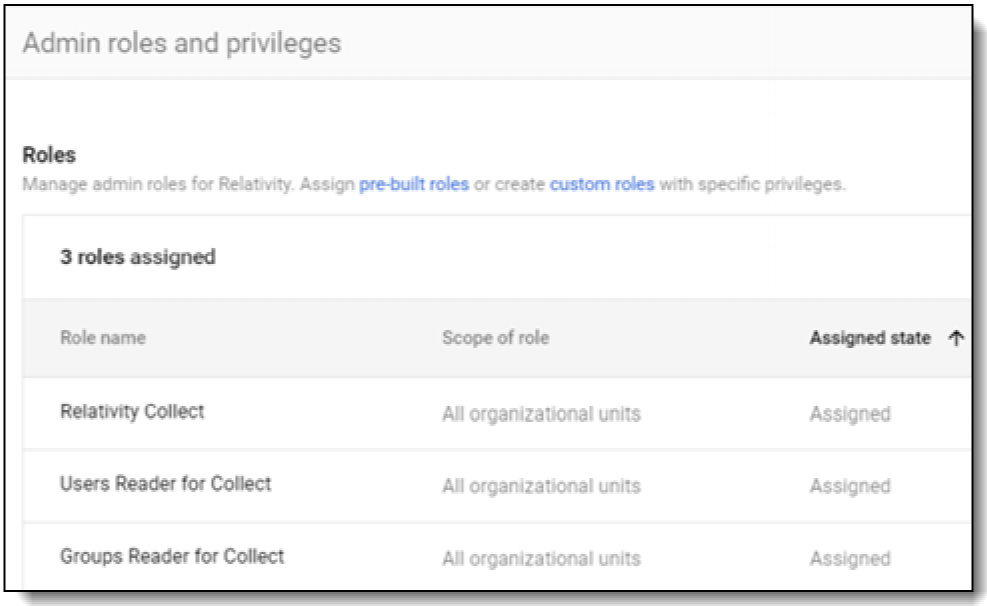


7. Click **Continue**.
8. Click **Create Role**.

6.3.4 Enable required privileges

1. Open https://admin.google.com/ac/home.
2. Navigate to **Directory > Users** to open the list of users.
3. Select or create the user you want to use.
4. Select and expand **Admin roles and privileges** pane.
5. Assign the following roles to the user in All organizational units scope
   - Relativity Collect

- Users Reader for Collect
- Groups Reader for Collect



6.4 Restricting collections to the selected user accounts

You can restrict collections to the selected group of users by leveraging admin role scoping to organizational units. To limit collections, you will need to create an organizational unit and add the users to the unit. Once created, Collect will only collect data from the users within the organizational unit.

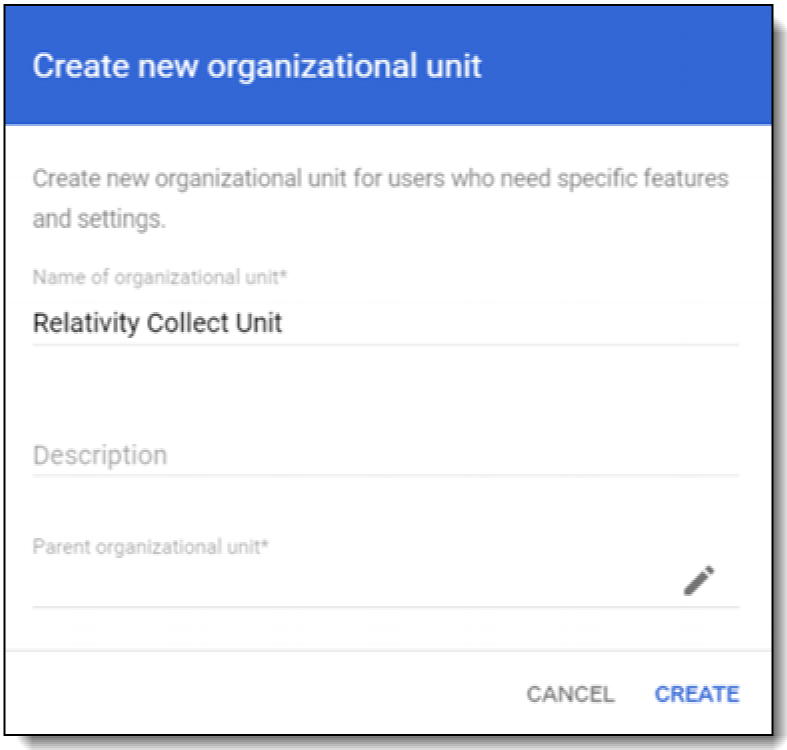
This configuration step is for Google Workspace data sources only and is optional.

6.4.1 Create an organizational unit

An organization unit restricts RelativityOne's collections only to the selected custodians. Create an organization unit and add selected custodians to the unit so only their information is collected.

To create an organizational unit, open Google Admin Console and follow the steps below:

1. Open https://admin.google.com/ac/home.
2. Navigate to **Directory > Organizational Units**.
3. On the Manage organizational units page, click the **+** icon.
4. In the **Create new organizational unit** pop-up menu, enter the Name of organizational unit.
5. (Optional) Enter description of the organizational unit.
6. Select the **Parent Organization Unit (POU)**. If this field isn't populated, add a POU. To create a POU, follow the steps in Google's documentation.
7. Click **Create**.



Once the organizational unit is created, the next step is to add targeted users you want to collect from to the unit.

To add users to the organizational unit, follow the steps below:

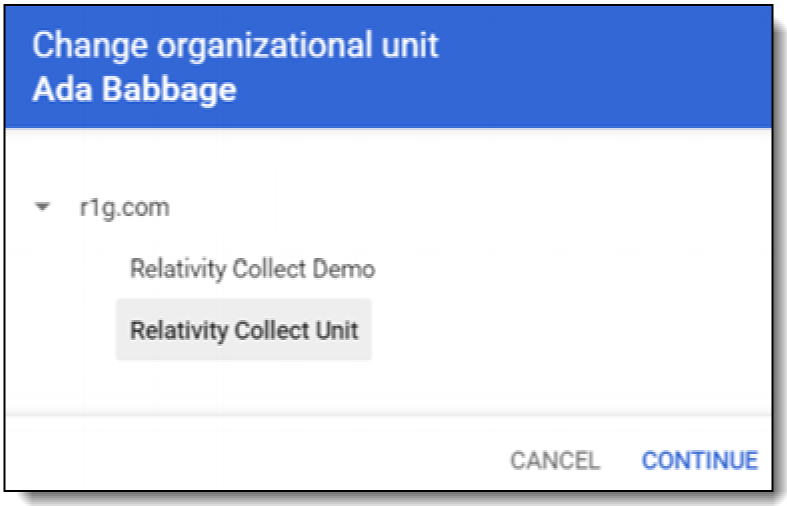
1. Click the navigation menu.
2. Navigate to **Directory > Users**.
3. Select the users who should have collections restricted
4. Click **Change organizational unit.**
5. In the Change organizational unit pop-up menu, select appropriate organizational unit.
6. Click **Continue**.
7. Click **Confirm**.

You can upload a .csv file to bulk update users. For more information, see Google's documentation.

6.4.2 Scope user privileges to the organizational unit

1. Open https://admin.google.com/ac/home.
2. Navigate to **Directory > Users**.
3. Select or create a user account.
4. Select and expand the **Admin roles a privileges** pane.
5. Click the pencil icon.

6. Edit the scope of the role to the appropriate organization unit.
7. Click **Save**.



Groups Reader privilege can only be scoped to *All organizational units*. This privilege is only required to enable collections from Google Workspace Groups and it can be omitted. Doing so will disable Groups collections on behalf of this user account.

6.5 Creating the data source

There are specific steps to connect Google Workspace to Relativity when creating the data source. To set up the Google Workspace data source, you will need to enable API access with Google Workspace and then complete the data source settings in Relativity.

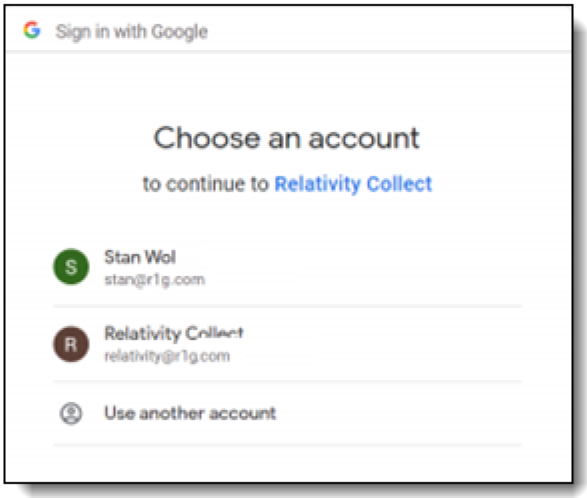
After confirming that your Discover APIs are enabled, complete the set up process in Relativity.

Notes: Copy the Refresh Token value you generate in Step 10 and store it in a secure location. It can be used to setup other Google Workspace data sources without the need to create new OAuth2 credentials. Google Workspace allows only a single refresh token to be generated for a set of OAuth2 credentials.

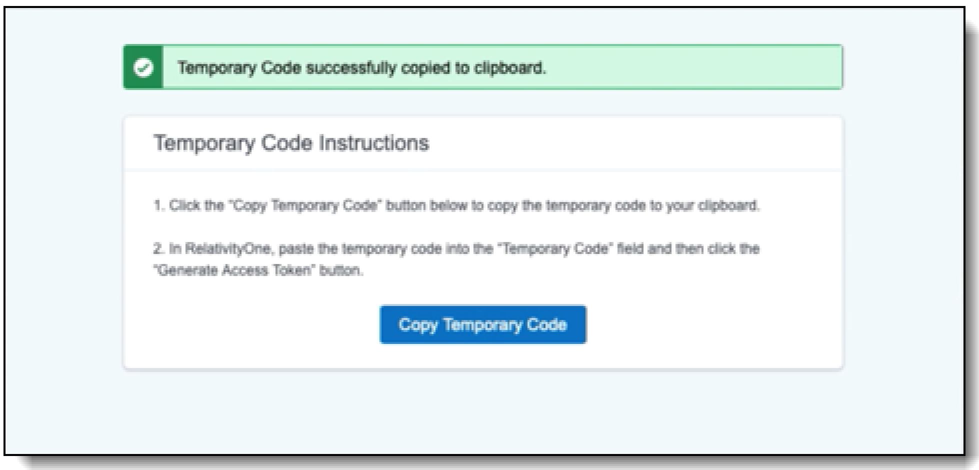
To add the Google Workspace data source, follow the steps below:

1. Within the Collect application, navigate to the **Collection Admin** tab.
2. Click the **New Collection Source Instance** button.
3. Enter in a unique name for the data source.
4. Select a **Google Workspace** data source.
5. In the Settings pane, enter **Client Id** and **Client Secret** copied from Google's OAuth2 credentials page. For more information, see Create credentials on page 19.
6. Click **Generate Code**.

7. Select or sign into Google's account on which behalf collections will be performed.



8. Click **Copy Temporary Code** to copy to your clipboard.



   Once copied, you can close that window and return back to RelativityOne.

9. In Collect, paste the code in the **Temporary Code** field.
10. Click **Generate Refresh Token**.

    The access token will be generated and populated in the Refresh Token field below.

    Notes: Copy Refresh Token value and store it in a secure location. It can be used to setup other Google Workspace data sources without the need to create new OAuth2 credentials.
    Google Workspace allows only a single refresh token to be generated for a set of OAuth2 credentials.

11. Click **Save**.

6.6 Configuring the data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will configure all sources in the step. Switch between each source by clicking the name of the data source in the left navigation menu. Clicking **Next** and **Previous** also moves you through the data sources. Select individual data sources by clicking on the checkbox and then using the right arrows to select them. After selecting the data sources to configure, fill out the criteria. Each data source has different criteria to enter.

Add criteria to collect specific data. To configure the data sources, complete the following fields:

- **Select and unselected tabs**—choose the data sources to collect from by moving unselected data sources to the selected list.
- **Field**—choose the field to filter on within the data source.

Notes: This field is only required when a calendar source is selected.

- **Operator**—choose an operator such as equals, contains, greater than, or less than.
- **Value**—enter a value to find in the selected field.

After selecting field options, you must click **Add Criteria**. Things to know about criteria:

- Each criteria is then separated by an AND operator.
- Leave the data source criteria empty to collect all data from the sources.

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. It also includes what can be searched within each data source. The criteria options change based on the selected data source.

The following table lists the filter criteria support for Google Workspace Chat collections. Google Workspace Chat data is collected in RSMF.

6.6.1 Google Groups

Setting criteria for Google Groups is not required. For more information on Advanced examples, see Google Workspace documentation.

The following table lists the filter criteria support for Google Workspace Groups collections. Setting criteria for Google Workspace Groups is not required. For more information on Advanced examples, see Google Workspace documentation.

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
Email BCC	Contains	When you use the Email From property in a query, the search returns all messages that contain the text in the Email BCC	If you search “@example.com,” your results include all blind carbon copied messages received by people with the @example.com in their email address.

Criteria	Operators	Description	Example
		field.	
Email CC	Contains	When you use the Email From property in a query, the search returns all messages that contain the text in the Email CC field.	If you search “@example.com,” your results include all carbon copied messages received by people with the @example.com in their email address.
Email From	Contains	When you use the Email From property in a query, the search returns all messages that contain the text in the Email From field.	If you search “@example.com,” your results include all messages sent by people with the @example.com in their email address.
Email Received Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Email Received Date property in a query, the search returns all messages that equal/doesn’t equal, greater/less than the date entered.	If you search “Less Than 1/1/2021,” your results include all emails received before January 1, 2021.
Email Sent Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Email Sent Date property in a query, the search returns all messages that equal/doesn’t equal, greater/less than the date entered.	If you search “Greater Than 1/1/2001,” your results include all emails sent after January 1, 2001.
Email To	Contains	When you use the Email To property in a query, the search returns all messages that contain the text in the Email To field.	If you search “@example.com,” your results include all messages sent to people with the @example.com in their email address.
Has Attachments	Equals, Does Not Equal	When you use the Has Attachments property, the search returns emails with or without attachments based on the Value setting.	If you mark toggle the Value setting On, your results include all messages that include an attachment.
Is Draft	Equals	Indicates whether or not messages are written and not sent. Use the values true or false.	If you mark toggle the Value setting On, your results include all emails that are in the drafted state.

Criteria	Operators	Description	Example
Keyword Search	Search In	When you use the Keyword Search property in a query, the search returns all messages that contain the text you are searching for.	If you search “Dear John,” your results include all messages that contain the text in email body. Note that this is not the same as searching for “Dear” OR “John”. In order to do that you need to enter keywords in separate lines.
Label	Equals	When you use the Label property, the search returns all messages that contains the search word or phrase in the emails' label.	If you search "Important," your results include all emails that are marked with the "Important" label.
Subject	Contains	When you use the Subject property, the search returns all messages that contains the search word or phrase in the email's title.	If you use the Subject property in a query, the search returns all messages which the subject line contains the text you’re searching for. In other words, the query doesn’t return only those messages that have an exact match. For example, if you search for subject “Quarterly Financials,” your results include messages with the subject “Quarterly Financials 2018.”

Included in the Google Workspace Groups Criteria is one toggle:

- **Collect all emails with attachments regardless of criteria**—enable the toggle to collect emails and attachments. Disable to collect only emails that match the criteria.

6.6.2 Gmail

Setting criteria for Google Drive is not required. For more information on Advanced examples, see Google Workspace documentation.

The following table lists the filter criteria support for Google Workspace Gmail collections. Setting criteria for Google Workspace Gmail is not required. For more information on Advanced examples, see Google Workspace documentation.

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
Email BCC	Contains	When you use the Email From property in a query, the search returns all messages that contain the	If you search “@example.com,” your results include all blind carbon copied messages received by people with the @example.com in their email address.

Criteria	Operators	Description	Example
		text in the Email BCC field.	
Email CC	Contains	When you use the Email From property in a query, the search returns all messages that contain the text in the Email CC field.	If you search “@example.com,” your results include all carbon copied messages received by people with the @example.com in their email address.
Email From	Contains	When you use the Email From property in a query, the search returns all messages that contain the text in the Email From field.	If you search “@example.com,” your results include all messages sent by people with the @example.com in their email address.
Email Received Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Email Received Date property in a query, the search returns all messages that equal/doesn’t equal, greater/less than the date entered.	If you search “Less Than 1/1/2021,” your results include all emails received before January 1, 2021.
Email Sent Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Email Sent Date property in a query, the search returns all messages that equal/doesn’t equal, greater/less than the date entered.	If you search “Greater Than 1/1/2001,” your results include all emails sent after January 1, 2001.
Email To	Contains	When you use the Email To property in a query, the search returns all messages that contain the text in the Email To field.	If you search “@example.com,” your results include all messages sent to people with the @example.com in their email address.
Has Attachments	Equals, Does Not Equal	When you use the Has Attachments property, the search returns emails with or without attachments based on the Value setting.	If you mark toggle the Value setting On, your results include all messages that include an attachment.
Is Draft	Equals	Indicates whether or not messages are written and not sent. Use the values	If you mark toggle the Value setting On, your results include all emails that are in the drafted state.

Criteria	Operators	Description	Example
		true or false.	
Keyword Search	Search In	When you use the Keyword Search property in a query, the search returns all messages that contain the text you're searching for.	If you search "Dear John," your results include all messages that contain the text in email body. Note that this is not the same as searching for "Dear" OR "John". In order to do that you need to enter keywords in separate lines.
Label	Equals	When you use the Label property, the search returns all messages that contains the search word or phrase in the emails' label.	If you search "Important," your results include all emails that are marked with the "Important" label.
Subject	Contains	When you use the Subject property, the search returns all messages that contains the search word or phrase in the email's title.	If you use the Subject property in a query, the search returns all messages which the subject line contains the text you're searching for. In other words, the query doesn't return only those messages that have an exact match. For example, if you search for subject "Quarterly Financials," your results include messages with the subject "Quarterly Financials 2018."

Included in the Google Workspace Gmail Criteria is one toggle:

- **Collect all emails with attachments regardless of criteria**—enable the toggle to collect emails and attachments. Disable to collect only emails that match the criteria.

6.6.3 Google Drive

Setting criteria for Google Drive is not required. For more information on Advanced examples, see Google Workspace documentation.

The following table lists the filter criteria support for Google Workspace Drive collections. Setting criteria for Google Workspace Drive is not required. For more information on Advanced examples, see Google Workspace documentation.

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
File Type	Equals	When you use the File Type property in a query, the search returns all files that equals what is entered.	If you select "Google Sheets" as your value, your results include Google Sheet files.

Criteria	Operators	Description	Example
Filename	Contains	When you use the Filename property in a query, the search returns all files that contain the value entered.	If you search "Important_Document," your results include all files with "Important_Document" in the filename.
Keyword Search	Search In	When you use the Keyword Search property in a query, the search returns all files that contain the text you're searching for.	If you search "Dear John," your results include all messages that contain the text in the file. Note that this is not the same as searching for "Dear" OR "John". In order to do that you need to enter keywords in separate lines.
Modification Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Modification Date property in a query, the search returns all files that equal/doesn't equal, greater/less than the selected date.	If you search "Less Than 1/1/2021," your results include all files received before January 1, 2021.
Owner	Contains	When you use the Owner property in a query, the search returns all messages that contain the text in the Owner field.	If you search "Iscovery," your results include all files sent by people with the "Iscovery" in their name, such as "Ed Iscovery."
Shared By	Contains	When you use the Shared By property in a query, the search returns all files that contain the text in the Shared By field.	If you search "ExampleUser1," your results include all filed shared by people with the UserExample1 in their name.
Shared With	Contains	When you use the Shared With property in a query, the search returns all files that contain the text in the Shared With field.	If you search "UserExample1," your results include all files shared with people with the UserExample1 in their name.
Version Date	Equals	When you use the Version Date property in a query, the search returns the version of files on the selected date.	If you search 1/1/2021, your results include only the version of the files on 1/1/2021. The results won't include earlier or later versions of the file.

Included in the Google Workspace Drive Criteria is one toggle:

- **Collect files from shared drives**—enable the toggle to retrieve data from shared drives, along with personal drives, that match the criteria. Disable to collect only data from personal drives that match the criteria.

6.6.4 Google Chat

Setting criteria for Google Workspace Chat is not required. For more information on Advanced examples, see Google Workspace documentation.

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced prop-	For more information on Advanced

Criteria	Operators	Description	Example
		erty in a query, specific Google Workspace search criteria become available in Collect. For more information, see Google Workspace documentation.	examples, see Google Workspace documentation.
Content Type	Equals	When you used the Content Type property in a query, the search returns messages with specific file types.	If you search with the value set to Google Docs, your results include all Google Docs sent as messages.
Keyword Search	Equals	When you use the Keyword Search property in a query, the search returns all messages that contain the text you're searching for.	If you search "Dear John," your results include all messages that contain the text in email body. Note that this is not the same as searching for "Dear" OR "John". In order to do that you need to enter keywords in separate lines.
Message Source	Equals	When you use the Message Source property in a query, the search returns all direct messages or all messages in rooms.	If you search with the value set to "Messages in Rooms," your results include only messages sent in a group chat and no direct messages will be included.
Sent/Updated Date	Greater Than or Equals, Less Than, Less Than or Equals	When you use the Sent/Updated property in a query, the search returns all messages that equal/doesn't equal, greater/less than the date entered.	If you search "Greater Than 1/1/2001," your results include all messages sent after January 1, 2001.
Slice Interval in Hours	Equals	When you use The Slice Interval in Hours property, the search returns all messages in a specific time range or defaults the slice interval to 24 hours.	If you search with a slice interval set to one hour and a conversation spans five hours, you will end up with five RSMFs after processing.
User At	Contains	When you use the User At property in a query, the search returns all messages that contain the text in the User At field.	If you search "UserExample1" your results include all messages sent to people with the UserExample1 in their email address.
User From	Contains	When you use the User From property in a query, the search returns all messages that contain the text in the User From field.	If you search "ExampleUser1," your results include all messages sent by people with the UserExample1 in their email address.

Included in the Google Workspace Chat Criteria are two toggles:

- **Include results from Rooms**—enable this toggle to include all messages in rooms, along with direct messages, that match your query. Disable to collect only direct messages that match your query.
- **Disable RSMF conversion**—enable this toggle to keep data in its original format by preventing Relativity from converting the files into Relativity's short message format (RSMF) files.

6.7 Troubleshooting

This table includes troubleshooting for Google's data sources.

Error	Cause	Resolution
The token is invalid. You must remove access and generate a new refresh token. For more information, see Troubleshooting above.	Your token is invalid. This could be due to changing the account owner.	While signed in with your account, navigate to https://myaccount.google.com/u/0/permissions. In the page, click **Remove Access**. Then generate a new refresh token. For more information on generating a refresh token, see Creating the data source on page 26

7 Collection

Before you begin collecting, you must create a collection job and associate it with a specific matter, custodians, and one or more data sources. Add the custodians, data sources, and other information using the Collect wizard. Once completed, start the collection using the Collect console. Finally, download a results report that details the items collected and a summary report of the entire collection job. For more information, see Reports on page 46.

7.1 Creating a collection

Before you begin creating a collection, make sure to create a matter. For more information, see Matters on page 9.

Use the following procedure to create a collection:

1. On the Collect tab, click the **Collections** sub-tab. Collect displays a list of the collections currently added to this application.
2. Click **New Collection**.
3. Complete the steps in the Collect wizard. See Using the Collect wizard below
4. On the Collection Details page, click **Run Collection** in the console. See Collect console on page 43.

7.2 Using the Collect wizard

The Collect wizard takes you through each step to create a collection. After completing the collection setup, run a collection from the Collection console.

Collection wizard security permissions

- **Custodian**—View

When a step is complete, click **Next** or the hyperlink under the next step shown. Click the **Previous** button to move to the previous step. Information is auto-saved when moving between steps. If any required information is wrong or missing, an error message displays and you cannot move to the next step.

7.2.1 Collection Details

Complete the Collection Details step by entering information in the following fields:

- **Name**—the name of the collection.

  Note: Enter a name using alphanumeric characters only. You cannot use special characters, such as periods, commas, and em dashes. Special characters will cause an error.

- **Collection Matter**—the name of the matter associated with this collection. Click **Edit** to select an existing matter or click **Add** to define a new one. See Creating a matter on page 9.
- **Processing Source Location**—the file repository for collected data to be stored for future processing of documents or for storing collected data.

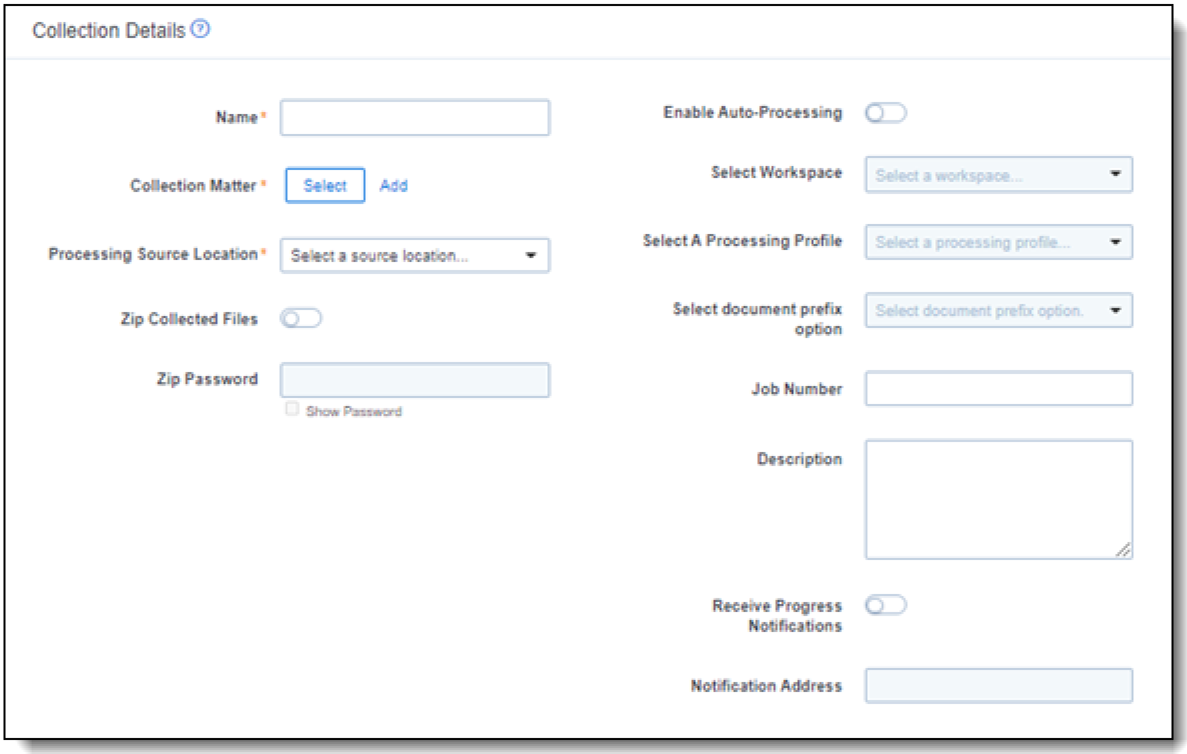
Note: All data sources that produce RSMF have a limit of 200 MB. For more information, see Processing documentation.

- **ZIP Collected Files**—toggle on to compress all collected data into ZIP64 formatted containers. For more information, see Collect Store on page 51. Relativity can compress Microsoft 365, Slack, and X1 data into zip folders.
    - Selecting *Yes* on the Collect Files in ZIP field adds your collected data into containers and puts it into a password protected compressed folder. The compressed folders separated by the custodian target collected. Each custodian target collect has its own folder. These folders will split when reaching a set size. The compressed folders are then stored in the processing staging area by default.
    - You can secure these compressed folders with a password. You can enter a password that you, or another user, needs to enter to open the compressed folder. Relativity stores these passwords in the password bank. You can retrieve them there at a later time.
    - To export your collected data, use the RelativityOne Staging Explorer.
    - Google compresses the data on their end and they exclude Google data from the ZIP64 formatted containers.
- **Zip Password**—enter a password that is required by anyone attempting to decompress the ZIP64 container files.

Note: If you have Processing installed in the workspace, Collect will automatically populate the Processing Password Bank with the password so it is available at the time the collection is processed.

- **Enable Auto-Processing**—toggle on to enable auto-processing. If enabled, select the workspace and profile. Relativity processes all data in a completed collection, or completed with errors collection, after a collection finishes.
- **Select Workspace**—select a workspace within your instance to select a Processing profile to use when creating a processing job.
- **Select a Processing Profile**—select a processing profile available in the drop-down menu. The available profiles are from the selected workspace.
- **Select a document prefix option**—select *Use Entity Document Number Prefix* or *Use Processing Profile Document Number Prefix* to apply to each file in the processing set once it's published to a workspace.
- **Job Number**—enter a number that you want assigned to the job for reporting purposes.
- **Description**—enter a description of the collection used for reporting purposes.
- **Receive Progress Notifications**—toggle on to send or receive collection job status emails. The statuses include:
    - **Completed**—includes completed or completed with errors job status.
    - **Failed**—includes job status and reason for failure.

- **Notification Address**—enter the email address of person that wants to receive collection job statuses.
- **Data Source Type**—select one or more data sources to use in the collection. For more information, see Data source types on page 14.



7.2.2 Data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will configure all sources in the step. Switch between each source by clicking the name of the data source in the left navigation menu. Clicking **Next** and **Previous** also moves you through the data sources. Select individual data sources by clicking on the checkbox and then using the right arrows to select them. After selecting the data sources to configure, fill out the criteria. Each data source has different criteria to enter.

7.2.2.1 Data source criteria

Add criteria to collect specific data. To configure the data sources, complete the following fields:

- **Select and unselected tabs**—choose the data sources to collect from by moving unselected data sources to the selected list.
- **Field**—choose the field to filter on within the data source.

  Notes: This field is only required when you select a calendar source.

- **Operator**—choose an operator such as equals, contains, greater than, or less than.
- **Value**—enter a value to find in the selected field.

After selecting field options, you must click **Add Criteria**. You can add multiple criteria to search data sources. Things to know about criteria:

- Each criteria is then separated by an AND operator.
- Leave the data source criteria empty to collect all data from the sources.

7.2.3 Custodians

Complete the Custodians step by assigning custodians to the project. Follow the steps below to assign a custodian:

1. From the Unselected custodians table, use the column filters to locate custodians.
2. Click a checkbox next to a custodian. Collect supports up to 30 custodians per collection project. If you need more than 30 custodians, you need to create another collection project.
3. Click > to add select custodians. Click >| to add all custodians.
4. Click **Next**.

Note: There is a limit of 10,000 listed custodians with targets in the custodian picker.

7.2.4 Non-custodial

Select non-custodial data sources to complete this step. Non-custodial data means you will select the sites that you want to collect. Selecting custodians is not required.

With non-custodial data, you can collect from parent-level sites only. All sub-sites under a parent site are automatically collected.

To select non-custodial data:

1. Click one or more data sources in the **Select Sources** column.
2. With one of the data sources highlighted, click the check boxes next to the sites you want to collect.
3. Click **Next**.

7.2.5 Collection Summary

Complete the creation of the collection by reviewing all steps, custodians, data sources, and targets, before finalizing. If Google Workspace custodian targets were not created before started the project, click **Generate Targets**. Clicking Generate Targets will check to see if targets exist for the custodians you have selected for collection. If the targets do not exist, Collect will automatically create them based on the email address contained in the Entity record for each custodian.

7.2.5.1 Targets

In the Targets section, you will see a number next a custodian's name. The number listed is the number of custodian targets found in the associated data source. A zero, 0, means Collect did not find any custodian targets with that email address in that data source. A one means Collect found a single custodian target associated with the email address within the data source. Any number greater than one means that Collect found multiple custodian targets with that email address within the data source.

If there is no color highlighting the number, it means Collect already found and generated the custodian target. If there is a green highlight, Collect autogenerated the custodian target. If there is a red highlight, Collect could not autogenerated this custodian target. If red, you can still manually generate the custodian target. For more information, see Creating a custodian target on page 12.

Complete the collection setup by clicking **View Collection Details**. Once you finish creating the collection, it redirects you to the Collection Details page. From the Collection Details page, you can preview and run the collection from the Collection Summary on the previous page.

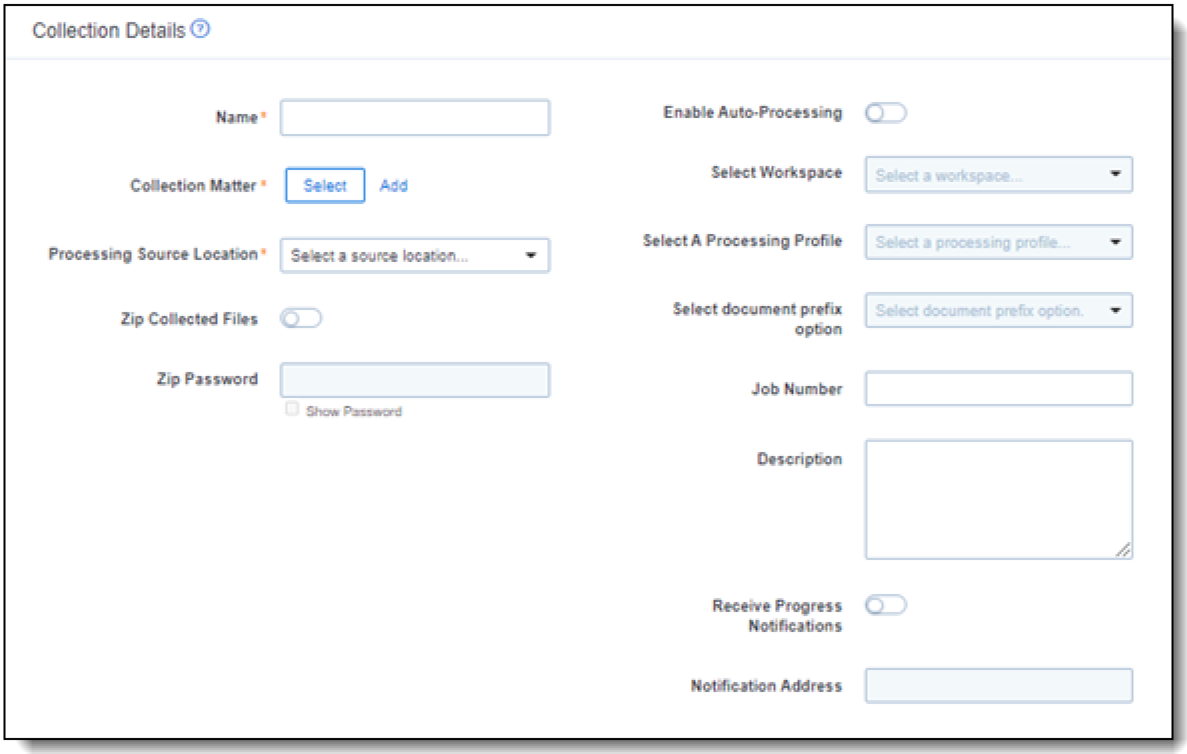
7.2.5.2 Non-custodian targets

In the Non-Custodian Targets section, you will see the target, target identifier, and the status.

- **Target**—the name you gave when creating the data source.
- **Target Identifier**—the URL of the SharePoint site.
- **Status**—a message telling you if the target is valid or invalid. If invalid, navigate to the data source details page and click the **Refresh Sites** button.

8 Viewing or editing collection data

Before and after creating a collection, you can view the Collection details page. On this page, you can view and edit collection details. You can also use the Collect console to start and stop collections, and view reports.



8.1 Collection details

You can display the collection details by clicking the name of a collection on the Collections tab. Collection also displays these details immediately after you add a new collection. On the Collection Details page, the buttons at the top of the page to edit, delete, or perform other collection tasks. Editing a collection takes you to the first step in the wizard. For more information, see Viewing or editing collection data above.

Note: Once a collection has started, the collection cannot be edited and is locked in read-only mode.

- **Collection Details**—lists the information that you entered or selected when you created the collection:
  - **Name**—lists the name given to the collection.
  - **Collection Matter**—lists the matter used in the collection.
  - **Job Number**—lists a number assigned to the job for reporting purposes.
  - **Description**—lists a description of the collection used for reporting purposes.
  - **Processing Source Location**—lists the file repository that collected data is stored for future processing of documents or for storing collected data.

- **Auto Processing Workspace**—lists if you toggled the field on or off.
- **Auto Processing Profile**—lists the processing profile if you toggled the Auto Processing Profile field on.
- **Auto Processing Document Numbering Prefix Option**—lists the prefix option if you selected one.
- **Job Status**—the status of the collection. Statuses are New, Not Started, Started, Completed, Error, and Completed with Errors.
- **Error Message**—lists a message if collection job did not complete due to errors.
- **Zip Collected Files**—lists if you selected to zip collected files.
- **Zip Password**—lists the password that everyone needs to decompress the ZIP64 container files.
- **Receive Email Notifications**—lists if you toggled on to send or receive collection job status emails.
- **Notification Address**—lists the email address of the person that will receive collection job statuses.

- **Collection Console**—displays buttons that you can use to perform the following tasks. See Collect console on the next page.
- **Data Sources**—lists all the collection activities associated with this collection.
  - **Custodian**—the custodian associated with the collection.
  - **Source Instance**—the name of the data source associated with the collection.
  - **Data Type Name**—the name of the target associated with the collection.
  - **Status**—displays one of the following statuses:
    - **Not Started**—the collection has not been started.
    - **Started**—the collection is in progress.
    - **Completed**—the collection is done.
    - **Completed with Errors**—the collection of the target completed and one or more targets had errors. For more information, see the Errors report on page 47.
    - **Failed**—the collection failed. For more information, see Reports on page 46.
  - **Error**—lists the error message if the status is Failed.
  - **Collected Items**—the number of files collected from the target without error. If nothing is collected, a 0 is listed.
  - **Collected Item Total**—the number of files that there are to collect without errors. If nothing is collected, a 0 is listed.
  - **Target**—the custodian target associated with the data source.
  - **Result Link**—a Comma Separated Values file download listing all individual items collected from the target. It contains all the associated metadata for each collected item as well. If no

results, the file is empty. For more information, see Viewing or editing collection data on page 41.

Notes: Google Workspace results download as a .xml file that you can convert into a .csv file using a third-party tool.

- **Error Link**—a Comma Separated Values file download listing any individual items that couldn't be collected because of errors during the collection. The report provides as much metadata as it can along with as much error information as we can get from the source to help identify what caused the error. If no errors, the file is empty. For more information on errors, see Viewing or editing collection data on page 41.

Notes: Google Workspace results download as a .xml file that you can convert into a .csv file using a third-party tool.

- **Previews**—the status and estimated number of items and size of collection. This is available after starting a preview. For more information, see Viewing or editing collection data on page 41.
- **Custodian Details**—the status of the custodian and the source instance. This card also includes the filter criteria, items, size, and errors.

8.2 Viewing collected data

When Relativity collects the data, Relativity accepts the path names and file names that the source provides. On occasion, the collection source modifies the path name or file name.

There is a difference between viewing grouped and individual collections data. To view grouped collections data, for sources like Bloomberg Chat, Google Chat, Slack, Teams, click the **Get Results** link to view your collection data. Although the Data Sources table will show N/A in the Collected Items and Collected Item Total columns, the collected data is still available in the download. These columns show N/A because more than one set of custodian data is included in the collection.

8.3 Collect console

After completing a setup, run the collection with the collection console. Verify connection, start or stop a collection, and view a collection report from the Collection console on the Collection Details page.

8.3.1 Collection

Once you decide to move forward with your collection, you will use this section of the console to start, stop, and adjust your collection job.

8.3.1.1 Start Collection

Click the **Start Collection** button the begin the collect project.

8.3.1.2 Stop Collection

Click **Stop Collection** to end the collection project that is currently running. Once you click this button, a warning pop-up message appears to confirm that you want to stop. Once you stop a collection, the collection cannot be restarted.

8.3.1.3 Retry Collection

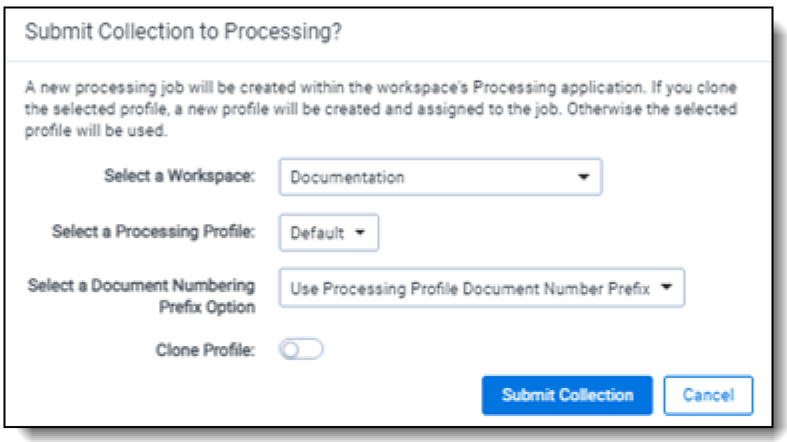
The Retry Collection button is only available when a collect job does not complete because of errors. Click **Retry Collection** to start another collect job that only retries the targets that have failed. You cannot retry targets that completed successfully.

8.3.1.4 Create Processing Job

Click **Create Processing Job** to create a processing set from the collected documents from the data sources. Locate these documents in the Processing Source Location set in Collection Details.

When you click the Create Processing Job button, a pop-up window displays with two fields:

- **Select a workspace**—select a workspace within your instance to select a Processing profile to use when creating a processing job.
- **Select a Processing Profile**—select a processing profile available in the drop-down menu. The available profiles are from the selected workspace.
- **Select a Document Numbering Prefix Option**—select *Use Processing Profile Document Number Prefix* or *Use Processing Profile Document Number Prefix* to apply to each file in the processing set once it is published to a workspace.
- **Clone Profile**—toggle off to use the selected processing profile. Toggle on to clone the selected processing profile and use the clone profile in conjunction with the created processing set.



After selecting a processing profile and deciding on cloning the profile, click the **Submit Collection** button. Once you submit the collection, Relativity creates a processing set with the same name as the collection job. The processing set includes all data that was collected in the collection job.

8.3.1.5 Clone Collection

Click **Clone Collection**to duplicate the open collect job. You can clone any collect job that has a status other than New.

After clicking the Clone Collection button, a pop-up modal displays the progress and completion of the clone.

Once the job is cloned, it is placed in the Not Started status and you can find it in the Collections list under the same name with "Cloned - YYYY-MM-DD HH.MM.SS" amended to the end. All collection totals for the cloned job associated targets are reset to zero. The Collection Detail Custodian Target fields are reset to zero. The cloned collect job also generates the new targets.

8.3.1.6 Reports

Collect includes comprehensive reporting capabilities that you can use to view information about your collections. You can generate these reports in the collection console within a collection project. Click on the name of a report to download. When generating a report, Relativity downloads different files through your browser. For more information on specific reports, see Reports on the next page.

9 Reports

Collect offers comprehensive reporting capabilities that you can use to view information about collections. You can set options to generate these reports based on matter and collection as well as other combinations.

Note: If you've developed and used a new data source plugin using the Collection API, the Targeted Collection Activity Report reports on the new data source or sources accordingly.

9.1 Running reports

You can generate these reports in the collection console within a collection project. Click on the name of a report to download. Locate the Collection Summary and Collection Details report in the collection console. Locate the Results and Error report in the Data Sources table on the Collection Details page.

When generating a report, Relativity downloads different files through your browser.

9.1.1 Collection Summary report

The Collection Summary report includes the target, target status, number of items collected, and the collection size. The report is grouped by custodians. Grouping by custodians makes it easy to sort the targets for each custodian with subtotals for each custodian. Grand totals are at the end of the report. The report downloads as a PDF file.

This report also includes filters that were used at any point in the collection. For example, if a modification data that is great or equals to 1/1/2010 is added at the criteria level, then that filter is listed in the summary report table. If no filter criteria was specified for the job, the report lists a "No Filter Criteria Applied" message.

Group-type data sources are also included in the list of data sources. This section is at the beginning of the report. For example, if you collect from Outlook calendars, Outlook mailboxes, and Slack, all collection summaries are included in the report.

The short message grouped collections lists the custodians involved in the collect, along with the data sources. The top of the report includes the custodian list. This section's title is "Short Message Grouped Collections." The report table includes the data source, target status, the number of items collected, and the collection size in gigabytes.

9.1.2 Collection Details report

The Collection Details report includes two files: the first file includes the successfully collected results of all items and their metadata. The second file includes the errored collection data. The error file includes as many of the items and as much of the items' metadata as it can. The report downloads as a CSV file.

This report, both files, is also stored in the assigned Entra ID file share. It is included in the collection output.

9.1.3 Results report

The Results report link for each target downloads as a CSV or XML file that contains a list of all individual items collected. These items include emails, files, or other data. It contains all of the associated metadata for each item. If no items were collected the file is empty.

The Results report is an XML file download of the results collected from a Google target.

9.1.4 Errors report

A Comma Separated Values file download of the errors that occurred during the collection from the target. If no errors occurred, the file is empty.

If the application is reporting errors with requests, creating objects, or parsing, check for correct permissions, check for healthy connections, and check if the fileshare is working. If the setup is correct, start diagnosing errors.

9.1.4.1 Errors.csv

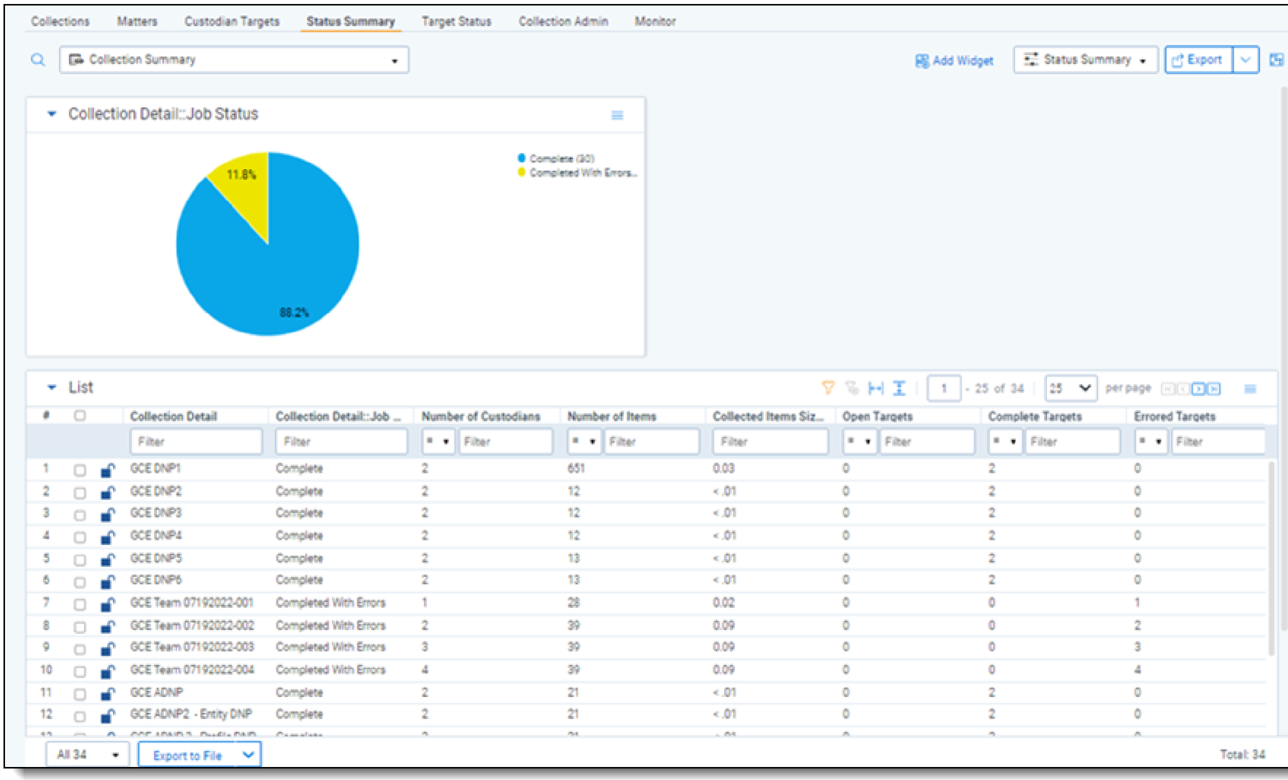
The report file lists one error per line. Each item is listed with an error ID alongside the message of the error that caused the item failure. Per-item errors only occur in the download phase of the collection; if an error occurs before (for example, if data is unavailable during our check) or after (for example, the worker cannot write the results.csv file to the fileshare) then there will be no record in the errors.csv report.

10 Status Summary

In Collect, you manage multiple collect jobs and you need to track all of them.

10.1 Job status

The job status dashboard to see the statuses of collection jobs. You can drill into each job from this dashboard. Able to look into the targets by custodian, data sources, or status to find out more about your collections. Focus on the collected components with this dashboard.



10.2 Reviewing job statuses

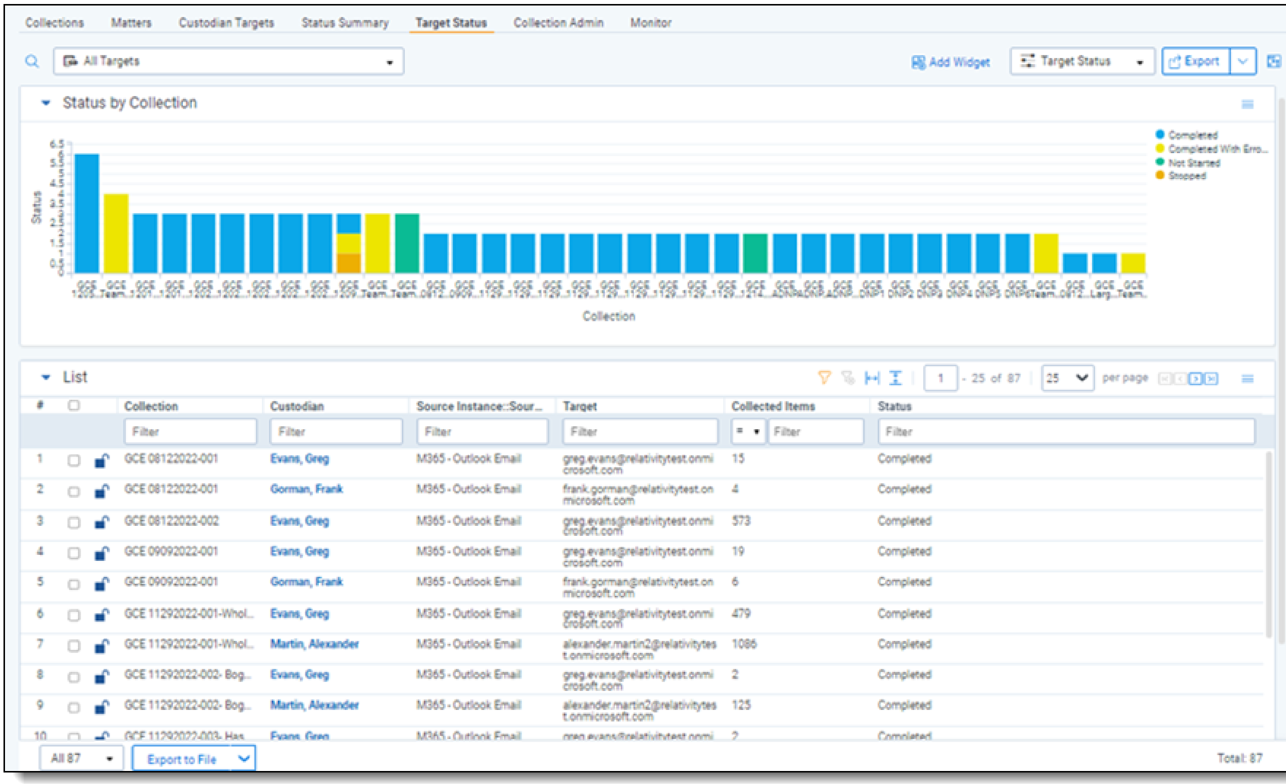
The job status dashboard is available after generating targets. To learn how to generate targets for a collection, see Collection Summary on page 39. Once you generate targets, the dashboard organizes by collection jobs.

Status:

- **Not started**—the collection is set up, but hasn't been started.
- **Started**—the collection started and has not completed.
- **Completed**—the collection of the target completed without any errors.
- **Completed with Errors**—the collection of the target completed and had individual items that couldn't be collected. For more information, see the Errors report on the previous page.
- **Error**—the collection did not run successfully and couldn't collect from the target.

11 Target Status

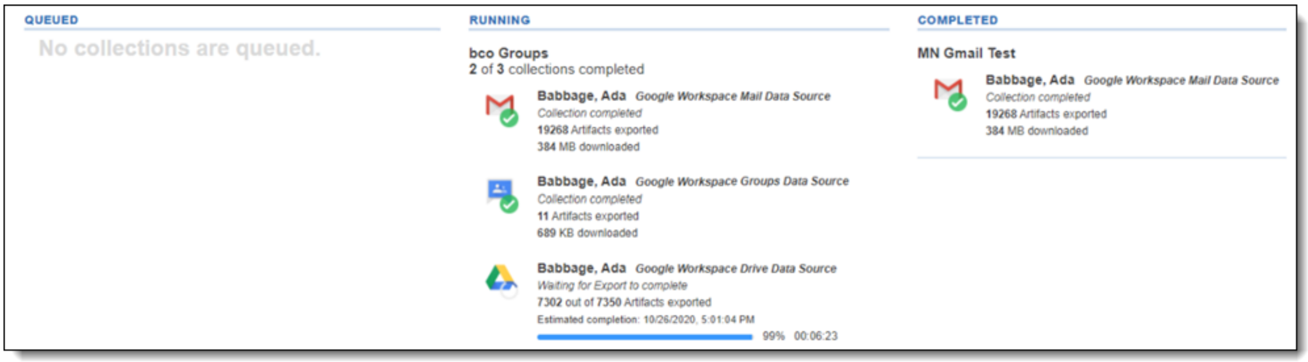
The Target Status tab is a dashboard to see the statuses of collections. You can drill into each target from this dashboard. Able to look into the targets by custodian, data sources, or status to find out more about your collections. Focus on the collected components with this dashboard.



12 Monitor

Monitor pending, running, and completed collect jobs in the Monitor tab. The Monitor page only tracks collect jobs from the last 24-hour time range.

The queued column lists the created collect jobs that have not started. The running column lists collect jobs in progress and with their current progress displayed in a status bar. The completed column lists collect jobs completed successfully, completed with errors, the amount of data collected, and the elapsed time.



13 Collect Store

Large volumes of raw collected evidence can be stored in the RelativityOne Store instead of being processed right away. Migrating collected data to storage before processing or review reduces consumption of physical space and reduces RelativityOne resources during an upgrade. From RelativityOne Store, you can process or start reviewing the data at a more suitable time. For more information, see Store on the RelativityOne documentation site.

When wanting to store collected data, select the Store option as the processing source location as the collection output in the Collect Details step of the Collect wizard. For more information, see Using the Collect wizard on page 36.

13.1 Moving collected data into storage

When creating a collection job, you have to select a Processing Source Location. The Store option is available in the Processing Source Location drop-down menu within the first step of the Collect Wizard. For more information on the Processing Source Location, see Using the Collect wizard on page 36.

13.2 Exporting collected data

When it is necessary to export the data, the user needs to use the RelativityOne Staging Explorer to export the collected data located in Store. For more information, see RelativityOne Staging Explorer on the RelativityOne documentation site.

Before using the RelativityOne Staging Explorer, the data can be containerized in a compressed folder if option is selected so the metadata of the collection does not change when it is exported.

Proprietary Rights

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