

# Relativity Collect - Microsoft 365

---

March 12, 2024

# Table of Contents

<b>1 Collect</b>	<b>6</b>
<b>2 Installing Collect</b>	<b>7</b>
2.1 System requirements for Collect	7
2.2 Installing Collect	7
2.2.1 Installing Collect from the application library	7
2.3 Permissions to run Collect	8
<b>3 Matters</b>	<b>10</b>
3.1 Creating a matter	10
3.2 Matter Details layout fields	10
3.3 Viewing or editing matter details	11
<b>4 Custodian targets</b>	<b>12</b>
4.1 Custodians	12
4.2 Fields	13
4.3 Creating a custodian target	13
4.3.1 Generating targets in the wizard	14
4.4 Removing custodian targets	14
<b>5 Data sources</b>	<b>15</b>
5.1 Creating a collect data source	15
5.2 Data source types	15
<b>6 Microsoft 365 - OneDrive data source</b>	<b>17</b>
6.1 Considerations	17
6.2 Accessing Microsoft 365 tenants	17
6.2.1 Registering the Collect application and setting permissions	17
6.3 Finding Azure credentials	19
6.4 Limiting application registration access to accounts	20
6.5 Revoking application access	20
6.5.1 Revoking access via Powershell	20
6.6 Creating the data source	21
6.7 Settings fields	21
6.7.1 Data source details	22

6.8 Configure data source .....	22
6.8.1 Data source criteria .....	22
6.8.2 Collecting preserved files .....	24
<b>7 Microsoft 365 - Outlook data source .....</b>	<b>25</b>
7.1 Considerations .....	25
7.2 Accessing Microsoft 365 Outlook .....	25
7.2.1 Registering the Collect application and setting permissions .....	25
7.3 Finding Azure credentials .....	29
7.4 Limiting application registration access to accounts .....	29
7.5 Revoking application access .....	30
7.5.1 Revoking access via Powershell .....	30
7.6 Creating the data source .....	31
7.7 Fields settings .....	31
7.7.1 Data source details .....	31
7.8 Configuring the data source .....	32
7.8.1 Data source criteria .....	32
7.8.2 Criteria .....	33
7.9 Collecting preserved files .....	38
7.10 Viewing collected data .....	38
7.10.1 File names for Outlook email .....	38
7.10.2 Files names on a preservation hold .....	38
7.10.3 Email considerations .....	38
7.11 Troubleshooting .....	39
<b>8 Microsoft 365 - SharePoint data source .....</b>	<b>40</b>
8.1 Considerations .....	40
8.2 Accessing Microsoft 365 tenants .....	40
8.2.1 Registering the Collect application and setting permissions .....	40
8.3 Finding Azure credentials .....	42
8.4 Limiting application registration access to accounts .....	42
8.5 Revoking application access .....	43
8.5.1 Revoking access via Powershell .....	43
8.6 Creating the data source .....	44

8.6.1 Settings fields .....	44
8.6.2 Data source details .....	44
8.7 Configure data source .....	45
8.7.1 Data source criteria .....	45
8.7.2 Collecting preserved files .....	46
8.8 Troubleshooting .....	46
<b>9 Microsoft 365 - Teams data source .....</b>	<b>47</b>
9.1 Considerations .....	47
9.2 Accessing Microsoft 365 tenants .....	47
9.2.1 Licensing requirements .....	47
9.2.2 Billing requirements .....	48
9.2.3 Registering the Collect application and setting permissions .....	48
9.3 Finding Azure credentials .....	51
9.4 Limiting Application Registration access to accounts .....	51
9.5 Revoking Application Access .....	51
9.5.1 Revoking access in Powershell .....	52
9.6 Creating the data source .....	52
9.7 Settings fields .....	53
9.7.1 Data source details .....	53
9.8 Configure data source .....	53
9.8.1 Data source criteria .....	54
<b>10 Collection .....</b>	<b>56</b>
10.1 Creating a collection .....	56
10.2 Using the Collect wizard .....	56
10.2.1 Collection Details .....	56
10.2.2 Data source .....	58
10.2.3 Custodians .....	59
10.2.4 Non-custodial .....	59
10.2.5 Collection Summary .....	59
<b>11 Viewing or editing collection data .....</b>	<b>61</b>
11.1 Collection details .....	61
11.2 Viewing collected data .....	63

11.3 Collect console .....	63
11.3.1 Preview .....	64
11.3.2 Collection .....	65
<b>12 Reports .....</b>	<b>67</b>
12.1 Running reports .....	67
12.1.1 Collection Summary report .....	67
12.1.2 Collection Details report .....	67
12.1.3 Results report .....	67
12.1.4 Errors report .....	68
<b>13 Status Summary .....</b>	<b>70</b>
13.1 Job status .....	70
13.2 Reviewing job statuses .....	70
<b>14 Target Status .....</b>	<b>71</b>
<b>15 Monitor .....</b>	<b>72</b>
<b>16 Collect Store .....</b>	<b>73</b>
16.1 Moving collected data into storage .....	73
16.2 Exporting collected data .....	73
<b>17 Glossary .....</b>	<b>75</b>
<b>18 Index .....</b>	<b>92</b>

# 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 Microsoft 365 source.

---

- **Microsoft 365**—collect documents from a custodian's OneDrive account, a custodian's Outlook mailbox, archived mailbox, calendar, and contacts list, a custodian's Team account, and SharePoint sites. You can collect chats from Teams directly into RelativityOne Government. Teams is collect 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 [Microsoft 365 setup](#).

---

**Notes:** Depending on your RelativityOne license, your Microsoft tenant might be Microsoft 365 or Microsoft 365 Government. When using Microsoft 365 Government, all fields, workflows, and processes will be the same. The only difference will be the Microsoft 365 source icon you select when setting up a data source or creating a collection.

---

## 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-requisites:

- 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
<ul style="list-style-type: none"> <li>▪ <b>Collection</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Custodian</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Custodian Target</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Custodian Target Result</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Request</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Source Instance</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Source Type</b> – View, Edit, Add</li> <li>▪ <b>Collection Detail Summary</b> – View, Edit, Add</li> <li>▪ <b>Collection Matter</b> – View, Edit, Add</li> <li>▪ <b>Collection Source Instance</b> – View, Edit, Add</li> <li>▪ <b>Collection Source Instance Parameter</b> – View, Edit, Add</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Entities</b></li> <li>▪ <b>Collect</b> <ul style="list-style-type: none"> <li>◦ Matters</li> <li>◦ Custodian Targets</li> <li>◦ Collections</li> <li>◦ Status Summary</li> <li>◦ Target Status</li> <li>◦ Collection Admin</li> <li>◦ Monitor</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>None</b></li> </ul>



Object Security	Tab Visibility	Other Settings
<ul style="list-style-type: none"> <li>▪ <b>Collection Source Type</b> – View, Edit, Add</li> <li>▪ <b>Collection Source Type Parameter Type</b> – View, Edit, Add</li> <li>▪ <b>Collection Source Type Criteria</b> – View, Edit, Add</li> <li>▪ <b>Custodian Target</b> – View, Edit, Add</li> <li>▪ <b>Entity</b> – View, Edit, Add</li> <li>▪ <b>Custom</b> – View, Edit, Add</li> </ul>		

## 3 Matters

In Collect, a matter represents a legal action or case requiring you to collect electronic data from sources such as Microsoft 365. 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 56](#).

### 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 56](#).
  - **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 Microsoft Outlook 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 Microsoft 365.

---

**Note:** Custodian targets will automatically be generated based on the primary email address in the Entity record for the Microsoft 365 data source. Custodian targets can still be generated manually. The auto-generation of targets is based on the custodian's email address. For more information, see [Creating a custodian target on the next page](#).

---

### 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:

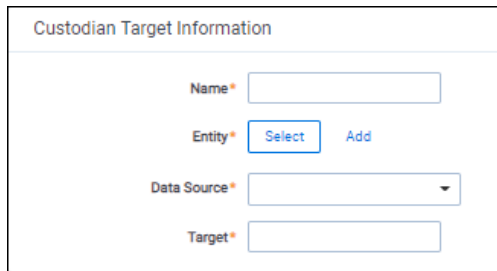
- **Custodian Type**—select one of the following:
  - **Person**—select this to enter first and last name of the individual acting as custodian of the data you wish to process.
  - **Other**—select this if the custodian of the data you wish to process is not an individual but is, for example, just a 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 the next page](#).
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 59](#).

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 12](#).

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

It is possible to collect data placed on a preservation hold through Relativity Legal Hold. For more information on preserving Microsoft 365 data using Legal Hold, see the Legal Hold guide.

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.

---

**Note:** Collect automatically collects any data that is preserved due to an in-place hold or litigation hold. Data on a hold is stored in a preservation library and separate folders. For more information, see [Microsoft Retention Policies](#).

---

4. Enter the data source-specific settings. For more information, locate your data source topic.
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, the data source is saved. If the connection fails, a message in the UI will indicate that the connection failed. If verification fails, verify that the values are correct. The data source will save when it is corrected and is verified.

Once the data source is set up, you'll see the data source information on the Collect Admin page.

### 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:

- **Microsoft 365 OneDrive**—select to collect data from OneDrive accounts. Unable to collect from inactive employee sites. The Graph API does not support access to inactive user accounts. For more information, see [Microsoft 365 - OneDrive data source on page 17](#).

- **Microsoft 365 Outlook**—select to collect data from Microsoft's email application. You can choose archived mailbox, calendar, contacts, and mailbox. Inactive employee mailboxes are included with mailbox collections. For more information, see [Microsoft 365 - Outlook data source on page 25](#).
- **Microsoft 365 SharePoint**—select to collect data from Microsoft SharePoint sites. For more information, see [Microsoft 365 - SharePoint data source on page 40](#).
- **Microsoft 365 Teams**—select to collect data from Microsoft's short-messaging application. This data source is only available for commercial, Microsoft 365 tenants. Requires enhanced licensing (E5) and access to Microsoft Protected APIs. For more information, see [Microsoft 365 - Teams data source on page 47](#).



## 6 Microsoft 365 - OneDrive data source

This topic provides details on how to capture Microsoft 365 OneDrive with Collect.

### 6.1 Considerations

Relativity cannot collect inactive employee mailboxes. The Graph API does not support access to inactive mailboxes.

### 6.2 Accessing Microsoft 365 tenants

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. You will use this ID and secret to configure data sources in Collect and provides access to the Office 365 tenants. You can register the application through Azure Portal or by registering the application permissions through the Microsoft App Registration Portal. After registering the application, request administrator consent. From there, it is possible to revoke application access.

Give Relativity access by first registering the application in Microsoft 365. Register the application permissions through Azure Portal.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

#### 6.2.1 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

Start with registering your app by following the steps below:

---

**Note:** The person completing the application registration process needs to be an Azure Administrator with sufficient privileges.

---

1. Open your [Azure Portal](#).
2. Click **More Services**.
3. Search for and select **Microsoft Entra ID** (formerly known as Azure AD).
4. In the left-navigation menu, click **App registrations**.
5. Click **New Registration**.  
This will open the Register an application page.
6. Enter an application name in the **Name** field.
7. Select **Accounts in this organizational directory only** as the supported account type.
8. Enter the redirect URL, <http://localhost/>, as the sign-on URL.
9. Click **Register**.

For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

From the app's page, add permissions to the web API. To add correct permissions based on your selected Microsoft 365 data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source. We recommend running through all steps for each data source.

---

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
  - Calendars.Read
  - Contacts.Read
  - Files.Read.All
  - Mail.Read
  - Sites.Read.All
  - User.Read.All

API / Permissions name	Type	Description	Admin consent requ...
▼ Microsoft Graph (7)			
Calendars.Read	Application	Read calendars in all mailboxes	Yes
Contacts.Read	Application	Read contacts in all mailboxes	Yes
Files.Read.All	Application	Read files in all site collections	Yes
Mail.Read	Application	Read mail in all mailboxes	Yes
Sites.Read.All	Application	Read items in all site collections	Yes
User.Read	Delegated	Sign in and read user profile	No
User.Read.All	Application	Read all users' full profiles	Yes

6. Click **Add permissions**.
7. Click **Grant Permission**.

Make a note of the application ID that Microsoft assigned to the app registration. This ID is also required for setup of data sources in Collect.

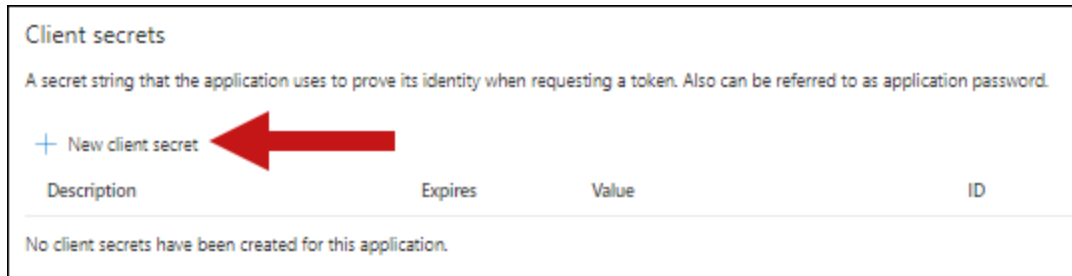
---

**Notes:** If you do not have the ability to grant Admin consent for application permissions, you will need to find an Admin that can consent.

---

Once clicked, the window will show all permissions granted.

1. Verify that you granted all permissions.
2. Click **Accept** to grant the permissions.
3. In the left navigation menu, click **Certificates & secrets**.
4. Click **New client secret**.



5. Enter a description in the Description text box.
6. Set the expiration time frame to the maximum time - **24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it in your text document.

---

**Notes:** In this step you should copy the secret and save it as you will need it to set up your data sources in Collect. Microsoft will only show this secret this one time, there is no way to recover a forgotten or lost secret.

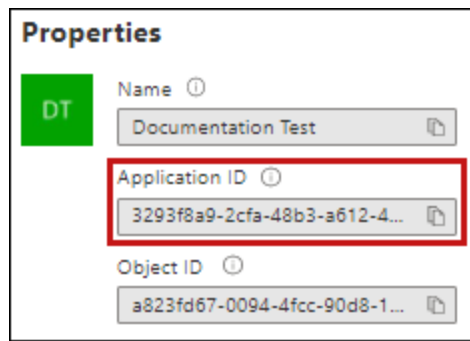
---

Provide your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.

## 6.3 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below in the [Azure Portal](#):

1. Click **Azure Active Directory**.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.  
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Click the copy icon next to the Application ID.



## 6.4 Limiting application registration access to accounts

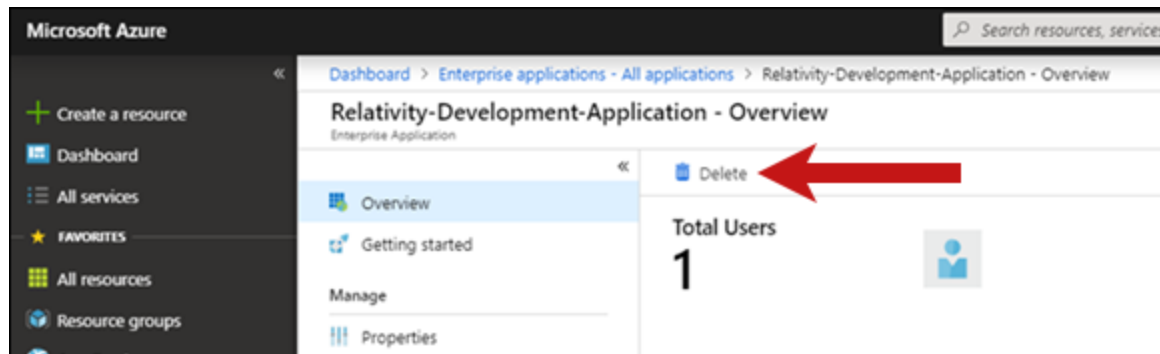
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 6.5 Revoking application access

You can revoke the application from <https://portal.azure.com> or by using a PowerShell script. For more information, see [Microsoft's documentation](#).

To revoke access from <https://portal.azure.com>,

1. Navigate to **Enterprise Application**.
2. Click **All applications**.
3. Locate your application.
4. Press the application link.
5. Press the **Delete**.



Collect no longer has access.

### 6.5.1 Revoking access via Powershell

Use the *Remove-MsolServicePrincipal* script to revoke access through Powershell. See below for an example of retrieving and deleting an application registration using Powershell.

```
Get-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

```
ExtensionData : System.Runtime.Serialization.ExtensionDataObject  
AccountEnabled : True  
Addresses : {}  
AppPrincipalId : 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602  
DisplayName : Relativity-Development-Application  
ObjectId : 51798fb3-e72c-4373-8c63-6e7d0dd63ad7  
ServicePrincipalNames : {19ab8a2e-ccce-4fa8-a9ee-eb16e220d602}  
TrustedForDelegation : False
```

```
Remove-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

## 6.6 Creating the 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.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select **Microsoft 365 OneDrive**.

---

**Note:** Collect automatically collects any preserved data that has an in-place hold or litigation hold. Microsoft stored data on a hold in a preservation library and separate folders. For more information, see [Microsoft Retention Policies](#).

---

4. Enter the required information in Settings. For more information, see [Settings fields below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Relativity saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. Relativity will save the data source when you correct it and it's verified.

Once you complete the data source setup, you will see the data source information on the Collect Admin page.

## 6.7 Settings fields

To connect Relativity to a Microsoft OneDrive data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the Domain name of the Microsoft 365 tenant you intend to collect from.
- **Application Id**—enter the Application ID created during registering the Collect application in Microsoft 365.

- **Application secret**—enter the Application Secret created during registering the Collect application in Microsoft 365.

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. The parameters will be saved when verified. If the Relativity cannot verify the parameters, you will get an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. Relativity does not save the parameters until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 6.7.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 6.8 Configure 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.

### 6.8.1 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.

---

**Note:** 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**. 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.

#### 6.8.1.1 Criteria

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 you can search within each data source. The criteria options change based on the Microsoft 365 Archived mailbox data source.

The following table lists the filter criteria support for OneDrive collections.

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 17](#).

When using search criteria to filter for Microsoft 365 OneDrive, different operators can return different results. Knowing the search operators is crucial.

The keyword search criteria uses the Search In operator. When using the Search In operator:

- Search for a phrase by entering the phrase without any OR operators into the Value text box.  
Example: acme corp contract
- Search for individual keywords by entering the keywords and separating them with an OR in the Value text box.  
Example: cat OR dog OR mouse

**Notes:** Enter the OR operator with all capital letters. You should add keywords and phrases in lower case only.

- Keywords hit on matches and if a word is prefixed with a keyword.  
Example: "Work" will return "workday" and "workplace"

Criteria	Operators	Description	Example
File Extension	Equal, Does Not Equal, Contains	When you use the File Extension property in a query, the search returns all files that contain the entered file extension.	If you search "Contains docx," your results include all Microsoft Word files saved with that extension.
File Path	Equal, Does Not Equal, Contains	When you use the File Path property in a query, the search returns all messages equals/does not equal or contain the folder path entered.	If you search "Contains C:/-documents/Relativity," your results include all files within the listed folder and any folder beyond the file path entered.
File Name	Equal, Does Not Equal, Contains	When you use the File Name property in a query, the search returns all files that equals/does not equal or contain the value entered.	If you search "Equals Important Document," your results include all files with that text in the file-name.
Creation Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Creation 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 messages created after January 1, 2001.
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 updated files that equal/doesn't equal, greater/less than the date entered.	If you search "Less Than 1/1/2020," your results include all files modified before January 1, 2020.
Keyword Search	Search In	When you use the Keyword Search property in a query, the search	If you search "Relativity," your results include all files that contain

Criteria	Operators	Description	Example
		returns all files containing the searched text.	the searched text in the file.

**Note:** For email, the date a recipient receives message or sent by the sender. For documents, the date a document was last modified.

## 6.8.2 Collecting preserved files

When running a collection with Microsoft data sources, Relativity collects all available files, including preserved files. You do not need to take extra steps to collect preserved files as they are automatically included in the collection. For more information on preserving data, see the Legal Hold guide.

When a Microsoft places a data source on a preservation hold, Microsoft creates a preservation hold library, a Recoverable Items folder. The addition of the Recoverable Items folder to Microsoft Exchange is another folder that can be collected. Collect can collect this folder because the Removable Items folder is an additional folder within a Microsoft data source.

When emails and files are on a preservation hold in Microsoft 365, Microsoft preserves original copies of any deleted or modified items. Microsoft stores preserved emails in the Recoverable Items folder and preserved files in the Preservation Library. Collect automatically collects from these file locations.

Relativity collects all versions of the document available in the preservation library. Collecting all versions of a document means that Relativity collects multiple versions of the same file with the corresponding SHA-256 hashes for each version of the data. If there were changes in the file version, the hash should be unique. For more information on hash identifiers, see [Microsoft 365 - OneDrive data source on page 17](#).



## 7 Microsoft 365 - Outlook data source

This topic provides details on how to capture Microsoft 365 Outlook mailbox, calendars, contacts, and archive mailboxes with Collect.

### 7.1 Considerations

Note the following considerations about Microsoft 365 Outlook data sources:

- Relativity can collect standard mailboxes and archived mailboxes, but treats those mailboxes as two different data sources. Each type has specific permissions that you must include in the Azure application registration.
- Microsoft limits pre-collection filtering. Search does not mimic search capabilities in either Microsoft Purview or Relativity dtSearch. This can cause confusion with search operators and data being searched.
- The Outlook data source supports collection of linked attachments.
- You cannot not collect private, one-on-one Teams chats with the Outlook data source. You can use the Teams data source to collect private, one-on-one Teams chats. For more information, see [Microsoft 365 - Teams data source on page 47](#).
- Authentication for collecting archived mailbox should use modern authentication. When using modern authentication, client ID and secret, the Exchange Web Services *full\_access\_as\_app* permission must be applied to the Azure app registration—TenantId, ClientId, ClientSecret. This permission is required for collecting online archived mailboxes and inactive mailboxes.
- If you have a GCC high tenant, then you need to use the GCC High connector when setting up a data source. For more information, see Microsoft's documentation. Also, if in GCC only, you can use the same Microsoft 365 commercial tile.
- Government 365 collections include archive mailboxes.

### 7.2 Accessing Microsoft 365 Outlook

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. Relativity uses this ID and secret to configure data sources in Collect and provides access to the Office 365 tenants. You can register the application through Azure Portal or by registering the application permissions through the Microsoft App Registration Portal. After registering the application, request administrator consent. From there, it is possible to revoke application access.

Allow Relativity access by first registering the application in Microsoft 365. Register the application permissions through Azure Portal.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

#### 7.2.1 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

Start with registering your app by following the steps below:

---

**Note:** The person completing the application registration process needs to be an Azure Administrator with sufficient privileges.

---

1. Open your [Azure Portal](#).
2. Click **More Services**.
3. Search for and select **Microsoft Entra ID** (formerly known as Azure AD).
4. In the left-navigation menu, click **App registrations**.
5. Click **New Registration**.  
This will open the Register an application page.
6. Enter an application name in the **Name** field.
7. Select **Accounts in this organizational directory only** as the supported account type.
8. Enter the redirect URL, `http://localhost/`, as the sign-on URL.
9. Click **Register**.

For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

From the app's page, add permissions to the web API. To add correct permissions based on your selected Microsoft 365 data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source, but we recommend running through all steps for each data source.

---

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
  - Calendars.Read
  - Contacts.Read
  - Files.Read.All
  - Mail.Read
  - Sites.Read.All

- User.Read.All

API / Permissions name	Type	Description	Admin consent requ...
▼ Microsoft Graph (7)			
Calendars.Read	Application	Read calendars in all mailboxes	Yes
Contacts.Read	Application	Read contacts in all mailboxes	Yes
Files.Read.All	Application	Read files in all site collections	Yes
Mail.Read	Application	Read mail in all mailboxes	Yes
Sites.Read.All	Application	Read items in all site collections	Yes
User.Read	Delegated	Sign in and read user profile	No
User.Read.All	Application	Read all users' full profiles	Yes

6. Click **Add permissions**.

7. Click **Grant Permission**.

To add permissions for Microsoft 365 online archived mailboxes and inactive mailboxes:

1. In the left-hand navigation, select **Manage>Manifest**.
2. Locate the *requiredResourceAccess* property in the manifest, and add the following JSON script inside the *requiredResourceAccess* square brackets ([ ]):

```
{
  "resourceAppId": "00000002-0000-0ff1-ce00-000000000000",
  "resourceAccess": [
    {
      "id": "dc890d15-9560-4a4c-9b7f-a736ec74ec40",
      "type": "Role"
    }
  ]
},
```

3. Click **Save**.
4. Click **API Permissions**.
5. Click **Add a permission**.
6. Click **Microsoft Graph**.
7. Select **Application Permissions**.
8. Select the following options from the Application Permissions section:
  - Calendars.Read.
  - Contacts.Read.
  - Files.Read.All.
  - Mail.Read.

- Sites.Read.All
- User.Read.All

9. Click **Add permissions**.

10. Confirm that the **full\_access\_as\_app** permission is listed.

API / Permissions name	Type	Description	Admin consent requ...
▼ Microsoft Graph (7)			
Calendars.Read	Application	Read calendars in all mailboxes	Yes
Contacts.Read	Application	Read contacts in all mailboxes	Yes
Files.Read.All	Application	Read files in all site collections	Yes
Mail.Read	Application	Read mail in all mailboxes	Yes
Sites.Read.All	Application	Read items in all site collections	Yes
User.Read	Delegated	Sign in and read user profile	No
User.Read.All	Application	Read all users' full profiles	Yes
▼ Office 365 Exchange Online (1)			
full_access_as_app	Application	Use Exchange Web Services with full access to all mailboxes	Yes

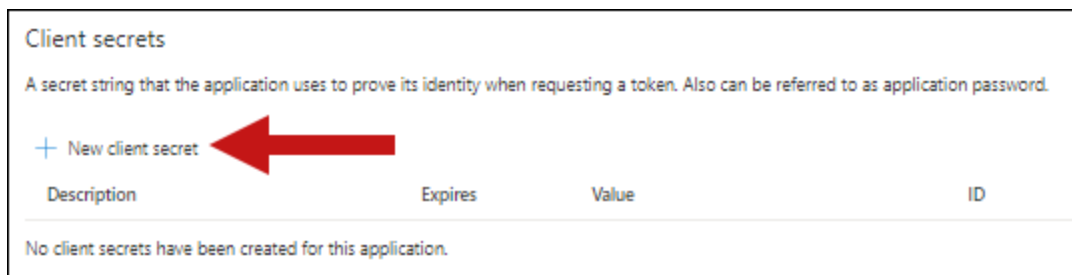
11. Click **Grant Permission**.

Make a note of the application ID that Microsoft assigned to the app registration. This ID is also required for setup of data sources in Collect.

**Notes:** If you do not have the ability to grant Admin consent for application permissions, you will need to find an Admin that can consent.

Once clicked, the window will show all permissions granted.

1. Verify all permissions have been granted.
2. Click **Accept** to grant the permissions.
3. In the left navigation menu, click **Certificates & secrets**.
4. Click **New client secret**.



5. Enter a description in the Description text box.

6. Set the expiration time frame to the maximum time - **24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it in your text document.

---

**Notes:** In this step you should copy the secret and save it as you will need it to set up your data sources in Collect. Microsoft will only show this secret this one time and there is no way to recover a secret.

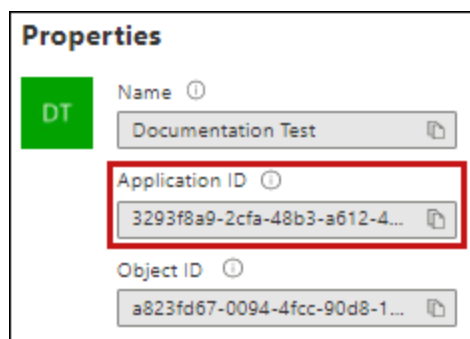
---

Provide your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.

## 7.3 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below in the [Azure Portal](#):

1. Click **Azure Active Directory**.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.  
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Click the copy icon next to the Application ID.



## 7.4 Limiting application registration access to accounts

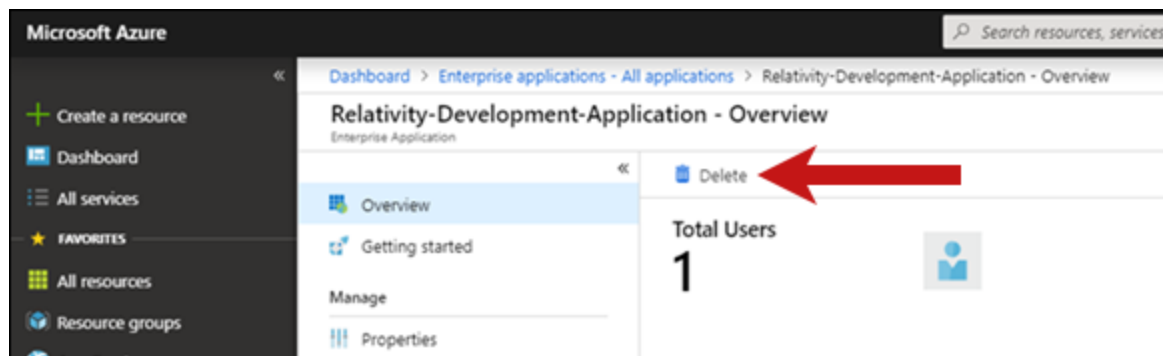
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 7.5 Revoking application access

You can revoke access to the application from <https://portal.azure.com> or by using a PowerShell script. For more information, see [Microsoft's documentation](#).

To revoke access from <https://portal.azure.com>,

1. Navigate to **Enterprise Application**.
2. Click **All applications**.
3. Locate your application.
4. Press the application link.
5. Press the **Delete**.



Collect no longer has access.

### 7.5.1 Revoking access via Powershell

You can use the Remove-MsolServicePrincipal script in Powershell to revoke access. See below for an example of retrieving and deleting an application registration using Powershell.

```
Get-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

```
ExtensionData : System.Runtime.Serialization.ExtensionDataObject
AccountEnabled : True
Addresses : {}
AppPrincipalId : 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
DisplayName : Relativity-Development-Application
ObjectId : 51798fb3-e72c-4373-8c63-6e7d0dd63ad7
ServicePrincipalNames : {19ab8a2e-ccce-4fa8-a9ee-eb16e220d602}
TrustedForDelegation : False
```

```
Remove-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

## 7.6 Creating the data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. You need to setup each data source once. You must create your data sources prior to setting up your custodian targets.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select a **Microsoft 365 Outlook** data source.

---

**Note:** Collect automatically collects any data that is preserved due to an in-place hold or litigation hold. Data on a hold is stored in a preservation library and separate folders. For more information, see [Microsoft Retention Policies](#).

---

4. Enter the required information in Settings. For more information, see [Fields settings below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Relativity saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. The data source will save when it is corrected and is verified.

Once you set up the data source, you will see the data source information on the Collect Admin page.

## 7.7 Fields settings

To connect Relativity to a Microsoft Outlook data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the Domain name of the Microsoft 365 tenant the collection is intended for.
- **Application Id**—enter the Application ID created during registering the Collect application in Microsoft 365.
- **Application secret**—enter the Application secret created during registering the Collect application in Microsoft 365. For more information, see [Accessing Microsoft 365 Outlook on page 25](#).

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. The parameters are saved when verified. If the parameters cannot be verified, you are presented with an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. The parameters will not be saved until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 7.7.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 7.8 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.

### 7.8.1 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.

---

**Note:** 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**. 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.

## 7.8.2 Criteria

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 Microsoft 365 Outlook data source.

### 7.8.2.1 Microsoft 365 Outlook mailbox

Relativity collects all items in visible folders within Outlook's inbox and custom folders. Relativity collects hidden folders that exist under the Top of Information Store and inactive mailboxes.

**Note:** The Microsoft 365 Outlook mailbox data source does not include soft deleted mailboxes, archived mailboxes, conversation history, notes, or tasks in the collections. To collect archived Outlook mailbox data, see [Microsoft 365 archive mailboxes on page 37](#).

Another difference is the separation of calendar items and outlook contacts. Microsoft combines those two items with the Outlook mailbox. Relativity separates them into different data sources. For more information, see [Microsoft 365 Outlook contacts on page 37](#) and [Microsoft 365 Outlook calendar on page 37](#).

The following list is a list of file classes included in Outlook mailbox collections.

#### Collected file classes

- IPM.Activity
- IPM.Document
- IPM.OLE.Class
- IPM
- IPM.Post
- IPM.StickyNote
- IPM.Recall.Report
- IPM.Remote
- IPM.Report
- IPM.Resend
- IPM.Schedule
- IPM.TaskRequest

#### Inactive mailbox

An inactive mailbox is a deleted mailbox that's on a preservation hold. The collection of inactive mailboxes happens automatically. A soft-deleted mailbox is a deleted mailbox not on a hold. Microsoft keeps soft-deleted mailboxes for 30 days before they're permanently deleted. Relativity cannot collect them.

Only the Email sent date and Email received date filter criteria and operators are supported for inactive mailboxes. Other filter criteria options get applied to active mailboxes, but they do not get applied to inactive mailboxes. This may result in collection of the entire inactive mailbox.

#### Collect all emails with attachments regardless of criteria

This data source also includes the *Collect all emails with attachments regardless of criteria* toggle. If you are using keyword search criteria, we recommend enabling the toggle, regardless of keyword search results, because searching email attachments is not supported through the Microsoft Graph API. Use the *Collect all emails with attachments regardless of criteria* to collect all emails with attachments, including ones that do not match the selected keyword search criteria. Toggle on to collect emails that match the keyword search criteria, emails that match other criteria such as date range, and all emails with attachments regardless of keyword search criteria. For example, if you add a date range and keywords, Collect pulls emails with keywords in the body, emails within the specified date range, and emails with attachments within the date range. Toggle off to collect only emails that match the search criteria.

Other filter criteria still applies to the collection. For example, if you specify a date range along with keywords, Collect does not return any emails outside the date range. It returns the emails within the date range that are either responsive to the keywords or have an attachment.

#### Outlook mailbox criteria

The following table lists the filter criteria supported for mailbox collections.

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 Outlook on page 25](#).

When using search criteria to filter for Outlook Mailbox, different operators can return different results. For example, the search criteria uses Search In and it does not use Contains. When using the Search In operator:

- Search for a phrase by entering the phrase without any OR operators into the Value text box.  
Example: acme corp contract
- Search for individual keywords by entering the keywords and separating them with an OR in the Value text box.  
Example: cat OR dog OR mouse

**Notes:** Enter the OR operator with all capital letters. You should add keywords and phrases lower case only.

- Keywords hit on matches and if a word is prefixed with a keyword.  
Example: "Work" will return "workday" and "workplace"

The following table lists the filter criteria supported for mailbox collections.

Criteria	Operators	Description	Example
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 field.	If you search "@example.com," your results include all blind carbon copied messages received by people with the @example.com in their email address.
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	Equals, 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	Does Not Equal, Equals, 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. Applied to inactive mailboxes.	If you search "Less Than 1/1/2020," your results include all emails received before January 1, 2020.
Email Sent Date	Does Not Equal,	When you use the Email Sent Date property in a query, the search returns all messages that	If you search "Greater Than 1/1/2001," your results include all emails sent after January 1, 2001.

Criteria	Operators	Description	Example
	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	equal/doesn't equal, greater/less than the date entered.  Applied to inactive mailboxes.	
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	Does Not Equal, Equals	When you use the Has Attachments property, the search returns emails with or without attachments based on the True or False setting.	If you mark "True," your results include all messages that include an attachment.
Keyword Search - Email Body	Search In	When you use the Keyword Search – Email Body property in a query, the search returns all messages email message contains 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 separate keyword by OR
Keyword Search - Email Metadata	Search In	When you use the Keyword Search – Email Metadata property in a query, the search returns all messages which the Email To, Email From, Email CC, or Email BCC fields contain the text you're searching for.	If you search kritter@example.com, your results include all messages that have the text in the Email To, Email From, Email CC, or Email BCC fields.
Parent Folder Name	Contains, Does Not Equal, Equals	When you use the Parent Folder Path property in a query, the search returns all messages in the folder that equal, does not equal, or contains the name entered. When using the Parent Folder Name criteria, listing a parent folder includes the child folders in the returned results.	If you search "RelativityOne," your results include all emails in the folder and all emails within the child folders listed under the "RelativityOne" parent folder.
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 that the subject line contains the text you're searching for. In other words, the query does not return only those messages that have an exact

Criteria	Operators	Description	Example
			match. For example, if you search for subject "Quarterly Financials," your results include messages with the subject "Quarterly Financials 2018."

#### 7.8.2.2 Microsoft 365 Outlook calendar

The following table lists the filter criteria supported for calendar collections. You're required to enter the start date and end data criteria for calendar collections. The maximum supported date range is five years. For example, it can be 1/1/2001 to 12/31/2006 but not 1/1/2000 to 12/31/2007.

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 Outlook on page 25](#).

You're required to enter the start and end dates when using an Microsoft 365 Outlook Calendar data source. The following table lists the filter criteria supported for Outlook calendar collections.

Criteria	Operators	Description	Example
Start Date	Equals	When you use the Start Date property in a query, the search returns calendar items that exist the day of and after the entered date.	When you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all calendar items on and between the two dates.
End Date	Equals	When you use the End Date property in a query, the search returns all calendar items the day of and before the entered date.	When you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all calendar items on and between the two dates.

#### 7.8.2.3 Microsoft 365 Outlook contacts

These properties are available for users to configure contacts, also called personal contacts, located in the personal address book of a user's mailbox. Relativity collects all contacts and no filter criteria is necessary.

Microsoft collects cached contacts, which are not contacts the user implicitly creates in Outlook. These contacts are not collected by Relativity.

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 Outlook on page 25](#).

#### 7.8.2.4 Microsoft 365 archive mailboxes

The following table lists the filter criteria supported for archive mailbox collections. Setting criteria for Microsoft 365 Email Archives is not required.

The Less Than operator is only supported when used in conjunction with Greater Than or Equals.

The following table lists the filter criteria supported for Outlook archived mailbox collections.

Criteria	Operators	Description	Example
Email Sent Date	Equals, Greater Than, Less Than	When you use the Email Sent Date property in a query, the search returns all messages that are greater than or equal/- less than the date entered. Less then operator is only supported together with the greater than or equals.	If you search "Greater Than 1/1/2001," your results include all emails sent after January 1,

Criteria Operators	Description	Example
		2001.

## 7.9 Collecting preserved files

When running a collection with Microsoft data sources, Relativity collects all available files including preserved files. You do not need to take extra steps to collect preserved files as they are automatically included in the collection. For more information on preserving data, see the Legal Hold guide.

When Microsoft places a data source on a preservation hold, Microsoft creates a preservation hold library, a Recoverable Items folder. The addition of the Recoverable Items folder to Microsoft Exchange is another folder that you can collect. Relativity can collect this folder because the Removable Items folder is an additional folder within a Microsoft data source.

When emails and files are on a preservation hold in Microsoft 365, Microsoft preserves original copies of any deleted or modified items. Find preserved emails in the Recoverable Items folder. Find preserved files in the Preservation Library. Collect automatically collects from these file locations.

Relativity collects all versions of the document available in the preservation library. Collecting all versions of a document means that Relativity collects multiple versions of the same file with the corresponding SHA-256 hashes for each version of the data. If there were changes in the file version, the hash should be unique. For more information on hash identifiers, see [Microsoft 365 - Outlook data source on page 25](#).

## 7.10 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.

### 7.10.1 File names for Outlook email

Relativity collects Microsoft 365 Outlook emails as individual .eml files. Collect maintains the original folder structure of the mailbox on disk. Each .eml resides in its respective mailbox folder.

### 7.10.2 Files names on a preservation hold

A randomly generated and unique ID is appended to the original file name of the document if someone moves a deleted document to the Preservation Hold library. For example, there is a document with the file name of *FY2017Budget.xlsx*. If someone deletes that document and then moves it to the Preservation Hold library, the file name of the document is modified. For example, the file name becomes something like *FY2017Budget\_DEAF727D-0478-4A7F-87DE-5487F033C81A2000-07-05T10-37-55.xlsx*.

When a document on a site that is on hold is modified and versioning for the document library in the site has been enabled, a copy of the file is automatically created in the Preservation Hold library. In this case, a randomly generated and unique ID is also appended to the file name of the document that is copied to the Preservation Hold library.

The reason why file names of moved or copied documents to the Preservation Hold library is to prevent conflicting file names. For more information about placing a hold on sites and the Preservation Hold library, see [Overview of in-place hold in SharePoint Server 2016](#).

### 7.10.3 Email considerations

Emails containing double byte characters and illegal characters will be HTML encoded to allow writing to the file system.

## 7.11 Troubleshooting

This table includes troubleshooting for Microsoft's archived mailboxes.

Error	Cause	Resolution
The remote server returned an error: (403).	Permissions have not been applied properly to the service account or application registration when using basic authentication or OAuth 2.0 respectively.	Apply the permission defined in the requirements section depending on your authentication method.
The specified folder could not be found in the store.	The mailbox does not have an archive.	Remove the mailbox from the list of targets. Review the requirements section of this document and check if this user has
Mailbox '...' doesn't have a valid license.	The owner of the mailbox does not have a valid license applied to their account.	a valid license. You can then choose to remove this user from the list of targets or apply a valid license.
The mailbox database is temporarily unavailable.	This error occurs if the mailbox database is not reachable. This can happen because the database is corrupt, in the process of being migrated, updated, or is offline for any other reason.	Wait an hour and retry the job to resolve this issue. If the issue persists, open a ticket with Microsoft.
The ExchangePrincipal object contains outdated information. The mailbox may have been moved recently.	The mailbox databases are separated in a way that causes inconsistent mailbox connections.	Retry the collection at a later time.
The request failed. Unable to connect to the remote server. A connection attempt failed because the connected party did not properly respond after a period of time, or established connection failed because connected host has failed to respond to microsoft_ip:443.	This is generally caused by a networking configuration either blocking access to the Exchange Online IP addresses— <a href="https://learn.microsoft.com/en-us/microsoft-365/enterprise/urls-and-ip-address-ranges?view=o365-worldwide">https://learn.microsoft.com/en-us/microsoft-365/enterprise/urls-and-ip-address-ranges?view=o365-worldwide</a> or Exchange Online blocking access to itself via an allow list.	Perform the necessary network, firewall, or allowed IP address configuration to allow the connector to access Exchange Online.

## 8 Microsoft 365 - SharePoint data source

This topic provides details on how to capture Microsoft 365 SharePoint with Collect.

### 8.1 Considerations

Note the following considerations about this data source:

- You can only collect parent level sites. You cannot collect sub-sites without collecting the parent level sites.
- Some Teams attachments may exist on the SharePoint sites. Teams chat data should live within the group mailbox of a Teams channel or the users mailbox for 1:1 chats. For more information, see [Microsoft 365 - Teams data source on page 47](#).

### 8.2 Accessing Microsoft 365 tenants

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. You will use this ID and secret to configure data sources in Collect and provides access to the Microsoft 365 tenants. You can register the application through Azure Portal or by registering the application permissions through the Microsoft App Registration Portal. After registering the application, request administrator consent. From there, it is possible to revoke application access.

Give Relativity access by first registering the application in Microsoft 365. Register the application permissions through Azure Portal.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

#### 8.2.1 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

Start with registering your app by following the steps below:

---

**Note:** The person completing the application registration process needs to be an Azure Administrator with sufficient privileges.

---

1. Open your [Azure Portal](#).
2. Click **More Services**.
3. Search for and select **Microsoft Entra ID** (formerly known as Azure AD).
4. In the left-navigation menu, click **App registrations**.
5. Click **New Registration**.  
This will open the Register an application page.
6. Enter an application name in the **Name** field.



7. Select **Accounts in this organizational directory only** as the supported account type.
8. Enter the redirect URL, `http://localhost/`, as the sign-on URL.
9. Click **Register**.

For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

From the app's page, add permissions to the web API. To add correct permissions based on your selected Microsoft 365 data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source. We recommend running through all steps for each data source.

---

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
  - Files.Read.All
  - Sites.Read.All
6. Click **Add permissions**.
7. Click **Grant Permission**.

Make a note of the application ID that Microsoft assigned to the app registration. This ID is also required for setup of data sources in Collect.

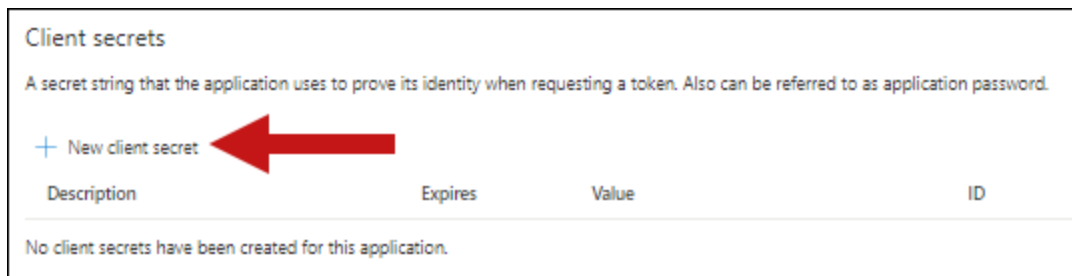
---

**Notes:** If you do not have the ability to grant Admin consent for application permissions, you will need to find an Admin that can consent.

---

Once clicked, the window will show all permissions granted.

1. Verify that you granted all permissions.
2. Click **Accept** to grant the permissions.
3. In the left navigation menu, click **Certificates & secrets**.
4. Click **New client secret**.



5. Enter a description in the Description text box.
6. Set the expiration time to the maximum time - **24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it in your text document.

---

**Notes:** In this step you should copy the secret and save it as you will need it to set up your data sources in Collect. Microsoft will only show this secret this one time, there is no way to recover a forgotten or lost secret.

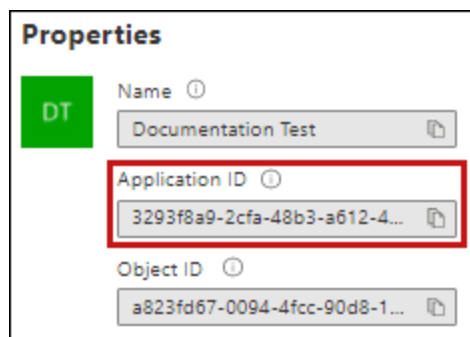
---

Give your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.

## 8.3 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below in the [Azure Portal](#):

1. Click **Azure Active Directory**.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.  
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Click the copy icon next to the Application ID.



## 8.4 Limiting application registration access to accounts

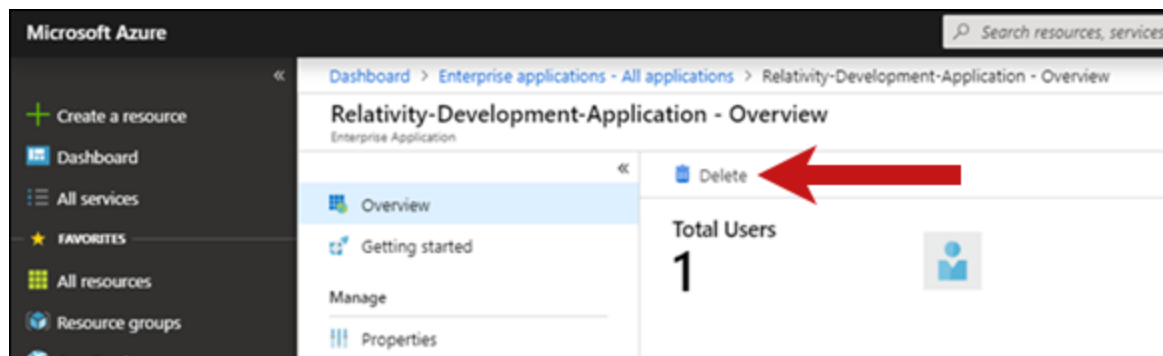
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 8.5 Revoking application access

Revoke the application from <https://portal.azure.com> or by using a PowerShell script. For more information, see [Microsoft's documentation](#).

To revoke access from <https://portal.azure.com>,

1. Navigate to **Enterprise Application**.
2. Click **All applications**.
3. Locate your application.
4. Press the application link.
5. Press the **Delete**.



Collect no longer has access.

### 8.5.1 Revoking access via Powershell

Use the Remove-MsolServicePrincipal script to revoke access through Powershell. See below for an example of retrieving and deleting an application registration using Powershell.

```
Get-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

```
ExtensionData : System.Runtime.Serialization.ExtensionDataObject
AccountEnabled : True
Addresses : {}
AppPrincipalId : 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
DisplayName : Relativity-Development-Application
ObjectId : 51798fb3-e72c-4373-8c63-6e7d0dd63ad7
ServicePrincipalNames : {19ab8a2e-ccce-4fa8-a9ee-eb16e220d602}
TrustedForDelegation : False
```

```
Remove-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

## 8.6 Creating the data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. You only need to complete setup once for each data source. You must create your data sources before setting up your targets.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select **Microsoft 365 SharePoint**.

---

**Note:** Collect automatically collects any preserved data that has an in-place hold or litigation hold. Microsoft stored data on a hold in a preservation library and separate folders. For more information, see [Microsoft Retention Policies](#).

---

4. Enter the required information in Settings. For more information, see [Settings fields below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Relativity saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. Relativity will save the data source when you correct it and it's verified.

Once you complete the data source setup, you will see the data source information on the Collect Admin page.

### 8.6.1 Settings fields

To connect Relativity to a Microsoft SharePoint data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the Domain name of the Microsoft 365 tenant you intend to collect from.
- **Application Id**—enter the Application ID created during registering the Collect application in Microsoft 365.
- **Application secret**—enter the Application Secret created during registering the Collect application in Microsoft 365.

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. Relativity saves the parameters after verification. If the Relativity cannot verify the parameters, you will get an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. Relativity does not save the parameters until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 8.6.2 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console with two options:

- **Refresh sites**—click to make Relativity check your SharePoint for disconnected or new sites.
- **Validate Connection**—click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 8.7 Configure 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.

### 8.7.1 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.

---

**Note:** 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**. 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.

#### 8.7.1.1 Criteria

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 you can search within each data source.

The following table lists the filter criteria support for SharePoint collections.

---

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 40](#).

---

When using search criteria to filter for Microsoft 365 SharePoint, different operators can return different results. Knowing the search operators is crucial.

Criteria Operators		Description	Example
Start Date	Equals	When you use the Start Date property in a query, the search returns calendar items that exist the day of and after the entered date.	When you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all calendar items on and between the two dates.
End Date	Equals	When you use the End Date property in a	When you search a Start Date of 1/1/2001

Criteria Operators	Description	Example
	query, the search returns all calendar items the day of and before the entered date.	and an End Date of 1/1/2020, Collect returns all calendar items on and between the two dates.

**Note:** For email, the date a recipient receives message or sent by the sender. For documents, the date a document was last modified.

### 8.7.2 Collecting preserved files

When running a collection with Microsoft data sources, Relativity collects all available files, including preserved files. You do not need to take extra steps to collect preserved files as they are automatically included in the collection. For more information on preserving data, see the Legal Hold guide.

When a Microsoft places a data source on a preservation hold, Microsoft creates a preservation hold library, a Recoverable Items folder. The addition of the Recoverable Items folder to Microsoft Exchange is another folder that you can collect. Relativity can collect this folder because the Removable Items folder is a folder within a Microsoft data source.

When emails and files are on a preservation hold in Microsoft 365, Microsoft preserves original copies of any deleted or modified items. Microsoft stores preserved emails in the Recoverable Items folder and preserved files in the Preservation Library. Collect automatically collects from these file locations.

Relativity collects all versions of the document available in the preservation library. Collecting all versions of a document means that Relativity collects multiple versions of the same file with the corresponding SHA-256 hashes for each version of the data. If there were changes in the file version, the hash should be unique. For more information on hash identifiers, see [Microsoft 365 - SharePoint data source on page 40](#).

## 8.8 Troubleshooting

Job status	Error log	Cause	Resolution
InvalidLicense	Needs a valid license to access this API.	A target of the collection does not have the correct license.	See the section on Licenses for a list of valid license. You can find the list of unlicensed users in the errors.csv file included in the results of the collection.

## 9 Microsoft 365 - Teams data source

This topic provides details on how to capture Microsoft 365 Teams with Collect.

### 9.1 Considerations

Note the following considerations about this data source:

- Requires enhanced licensing - E5 licensing. For more information, see [Licensing requirements below](#).
- To enable an Azure application registration to use metered APIs and services in Microsoft Graph, you must associate the application with an Azure subscription. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation. For more information, see [Billing requirements on the next page](#).
- We recommend limiting the date range of the collection. Extended date ranges can increase collection time and potentially create issues.

### 9.2 Accessing Microsoft 365 tenants

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. You will use the ID and secret to configure data sources in Collect and they provide access to the Office 365 tenants. You can register the application through Azure Portal or by registering the application permissions through the Microsoft App Registration Portal. After registering the application, request administrator consent. From there, it is possible to revoke application access.

Allow Relativity access by first registering the application in Microsoft 365. Register the application permissions through Azure Portal.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

#### 9.2.1 Licensing requirements

With the Teams Export API, Relativity meets compliance when collecting data. To use the API and collect Teams chats, users must meet one of the following licensing requirements. This licensing applies to individual custodian accounts.

- Office 365 E5/A5/G5
- Microsoft 365 E5/A5/G5
- Microsoft 365 E5/A5/F5/G5 Compliance and Microsoft 365 F5 Security & Compliance
- Microsoft 365 E5/A5/F5/G5 Information Protection and Governance

For more information, see relevant Microsoft documentation on the Microsoft site:

- <https://docs.microsoft.com/en-us/microsoftteams/export-teams-content>
- <https://docs.microsoft.com/en-us/graph/teams-licenses>
- <https://learn.microsoft.com/en-us/office365/servicedescriptions/microsoft-365-service-descriptions/microsoft-365-tenantlevel-services-licensing-guidance/microsoft-365-security-compliance-licensing-guidance#microsoft-graph-apis-for-teams-data-loss-prevention-dlp-and-for-teams-export>

### 9.2.2 Billing requirements

To enable an Azure application registration to use metered APIs and services in Microsoft Graph, you must associate the application with an Azure subscription. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation.

You must agree to Microsoft potentially billing you. Microsoft bills you if you exceed their seeded capacity, free quota, of API calls to the Teams Export API each month. For more information, see Microsoft's [Payment models and licensing requirements](#) documentation.

- Microsoft considers Relativity a *model=A* application. Microsoft restricts *model=A* to applications performing a security or compliance function, and requires a supported license. For more information, see Microsoft's [Teams licenses](#) documentation.
- Relativity uses the *Get messages across all chats for user* and *Get messages across all channels* APIs. Both have a seeded capacity of 1,600 messages per user per month per app. Each message over the seeded, free, capacity costs \$0.00075. Microsoft charges one message for requests returning an empty list. Seeded capacity is shared between chat and channel exports.
  - *Per user* does not mean a custodian. It means an E5 licensed user. For example, if you have 100 E5 licenses, you have a limit of 160,000 messages per month in seeded capacity.
  - After you reach the seeded capacity limit, according to Microsoft's \$0.00075 per notification charge, it takes about 1,333 messages to reach \$1. To calculate your exact numbers, use Microsoft's TeamsUserActivityUserDetail report. For more information, see Microsoft's [reportRoot: getTeamsUserActivityUserDetail](#) documentation.

### 9.2.3 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

---

**Note:** During the process, you must associate the application with an Azure subscription to enable an Azure application registration to use metered APIs and services in Microsoft Graph. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation.

---

Start with registering your app by following the steps below:

---

**Note:** The person completing the application registration process needs to be an Azure Administrator with sufficient privileges.

---

1. Open your [Azure Portal](#).
2. Click **More Services**.
3. Search for and select **Microsoft Entra ID** (formerly known as Azure AD).
4. In the left-navigation menu, click **App registrations**.



5. Click **New Registration**.  
This will open the Register an application page.
6. Enter an application name in the **Name** field.
7. Select **Accounts in this organizational directory only** as the supported account type.
8. Enter the redirect URL, `http://localhost/`, as the sign-on URL.
9. Click **Register**.

For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

From the app's page, add permissions to the web API. To add correct permissions to your Microsoft 365 Teams data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source, but we recommend running through all steps for each data source.

---

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
  - User.Read.All
  - ChannelMessage.Read.All
  - Chat.Read.All
  - Files.Read.All
  - Group.Read.All
  - TeamsTab.Read.All
  - Team.ReadBasic.All

---

**Note:** The Microsoft Graph API v1.0 requires this permission. If you do not apply this permission, the Teams collection will still work but will revert to a previous, less efficient version of the Graph API and it may impact performance.

---

- ChannelMember.Read.All

---

**Note:** The Microsoft Graph API v1.0 requires this permission. If you do not apply this permissions, the Teams collection will still work but will revert to a previous, less efficient version of the Graph API and it may impact performance.

---

6. Click **Add permissions**.
7. Click **Grant Permission**.

Make a note of the application ID that Microsoft assigned to the app registration. This ID is also required for setup of data sources in Collect.

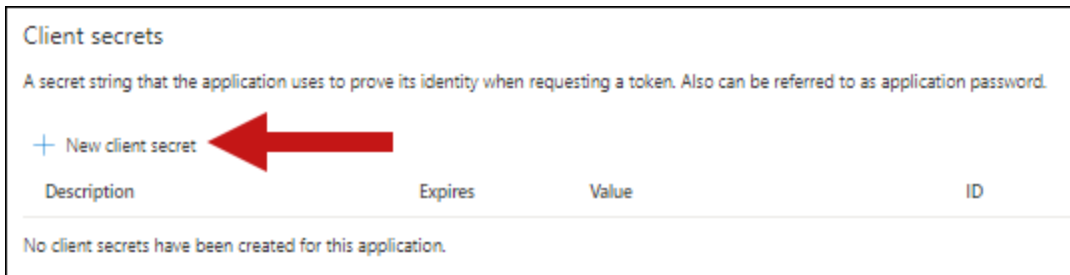
---

**Notes:** If you do not have the ability to grant Admin consent for application permissions, you'll need to find an Admin that can consent.

---

Once clicked, the window will show all permissions granted.

1. Verify that all permissions have been granted.
2. Click **Accept** to grant the permissions.
3. In the left navigation menu, click **Certificates & secrets**.
4. Click **New client secret**.



5. Enter a description in the Description text box.
6. Set the expiration time to the maximum time—**24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it in your text document.
  - Give your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.
  - In this step you should copy the secret and save it as you will need it to set up your data sources in Collect. Microsoft will only show this secret this one time, there is no way to recover a lost or forgotten secret.
9. Finally, you must associate the application with an Azure subscription to enable an Azure application registration to use metered APIs and services in Microsoft Graph. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation.

---

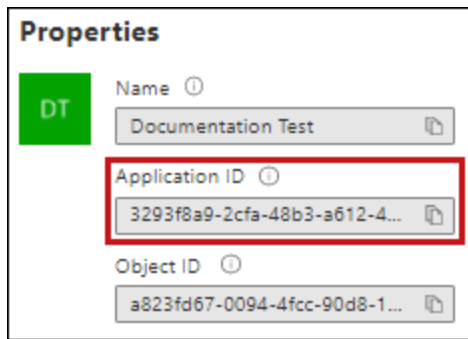
**Notes:** You cannot use Collect with a Teams data source without completing this step. For more information, see [Billing requirements on page 48](#).

---

## 9.3 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below in the [Azure Portal](#):

1. Click **Azure Active Directory**.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.  
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Click the copy icon next to the Application ID.



## 9.4 Limiting Application Registration access to accounts

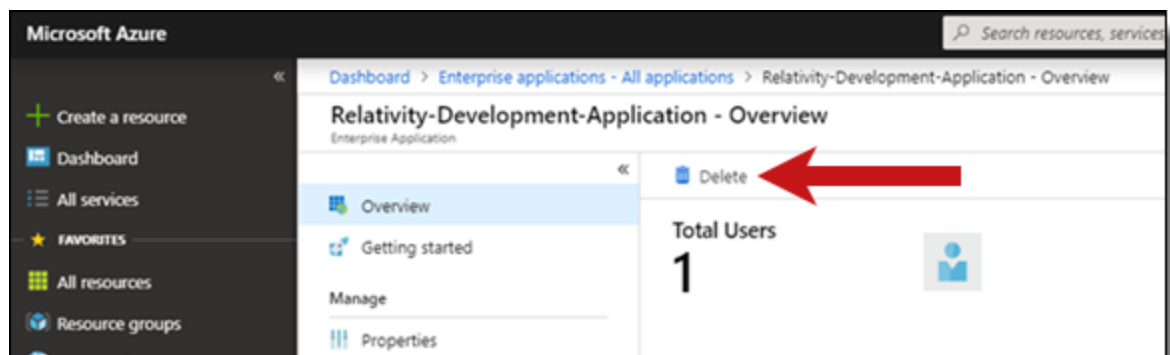
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 9.5 Revoking Application Access

You can revoke the application from <https://portal.azure.com> or by using a PowerShell script. For more information, see [Microsoft's documentation](#).

To revoke access from <https://portal.azure.com>,

1. Navigate to **Enterprise Application**.
2. Click **All applications**.
3. Locate your application.
4. Press the application link.
5. Press the **Delete**.



Collect no longer has access.

### 9.5.1 Revoking access in Powershell

Revoke access in Powershell using the Remove-MsolServicePrincipal script. See below for an example of retrieving and deleting an application registration using Powershell.

```
Get-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

```
ExtensionData : System.Runtime.Serialization.ExtensionDataObject
AccountEnabled : True
Addresses : {}
AppPrincipalId : 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
DisplayName : Relativity-Development-Application
ObjectId : 51798fb3-e72c-4373-8c63-6e7d0dd63ad7
ServicePrincipalNames : {19ab8a2e-ccce-4fa8-a9ee-eb16e220d602}
TrustedForDelegation : False
```

```
Remove-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

## 9.6 Creating the data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. You only need to setup each data source once. You must create your data sources prior to setting up your custodian targets.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select **Microsoft 365 Teams**.

---

**Note:** Collect automatically collects any preserved data in an in-place hold or litigation hold. Microsoft stored data on a hold in a preservation library and separate folders. For more information, see [Microsoft Retention Policies](#).

---

4. Enter the required information in Settings. For more information, see [Settings fields on the next page](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Collect saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. Collect will save the data source when it's corrected and verified.

Once you complete the data source setup, you'll see the data source information on the Collect Admin page.

## 9.7 Settings fields

To connect Relativity to a Microsoft Teams data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the domain name of the Microsoft 365 tenant the collection is for.
- **Application Id**—enter the application ID created during registering the Collect application in Microsoft 365.
- **Application secret**—enter the application secret created during registering the Collect application in Microsoft 365. For more information, see [Accessing Microsoft 365 tenants on page 47](#).

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. Collect saves the parameters when verified. If the parameters cannot be verified, you will get an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. The parameters will not save until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 9.7.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 9.8 Configure data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you'll 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.

---

#### Notes:

- The Microsoft 365 Teams data source collects the most recent version of each message.
  - Deleted messages are available to collect for 21 days from the time of deletion.
  - Task module content is not currently supported for collection.
-

## 9.8.1 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.

---

**Note:** 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**. 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.

The following table lists the filter criteria supported for Microsoft Teams collections.

Relativity collects Microsoft Teams data in RSMF.

---

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 47](#).

---

When using search criteria to filter for Teams, you must select start dates and end dates. All dates are in Coordinated Universal Time (UTC). The maximum date range supported is five years. For example, you can select Start Date 1/1/2016 and End Date 1/1/2021, but no further.

Criteria Operators		Description	Example
Chat Type	Equals	When you use the Chat Type property in a query, the search returns all messages in either Private Channels, Private Chats, or Public Channels.	If you search a Chat Type with the Public Channels operator selected, Relativity collects only messages in public channels that the custodians are in.
End Date	Less Than or Equals	When you use the End Date property in a query, the search returns all messages the day of and before the entered date.	If you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all messages on and between the two dates.
Slice in 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.
Start Date	Greater Than or Equals	When you use the Start Date property in a query, the search returns messages that exist the day of and after the entered date.	If you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all messages on and between the two dates.

Included in the Microsoft 365 Teams criteria are two toggles:

- **Collect linked files external to M365**—enable the toggle to collect modern attachments, or files linked in Teams that are external to the Microsoft 365 tenant. You must opt in to confirm that you want

to collect files outside of Microsoft 365.

---

**Note:** This option is only available for RelativityOne production environments. RelativityOne Government environments cannot collect external files.

---

- **Enable Dedupe**—enable the toggle to exclude cards contained in Teams chat messages. Due to the nature of how Microsoft provides card information, inclusion of cards prevents deduplication of RSMFs during processing. For more information, see Microsoft's documentation.

For more information, see [Microsoft Security and Compliance Center documentation](#).

## 10 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 67](#).

### 10.1 Creating a collection

Before you begin creating a collection, make sure to create a matter. For more information, see [Matters on page 10](#).

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 63](#).

For information on running concurrent Microsoft 365 collection jobs, see [Accessing Microsoft 365 tenants on page 17](#).

### 10.2 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.

#### 10.2.1 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 10](#).
- **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 73](#). 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.
- **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 15](#).

## 10.2.2 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.

### 10.2.2.1 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.

### 10.2.3 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.

---

### 10.2.4 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**.

### 10.2.5 Collection Summary

Complete the creation of the collection by reviewing all steps, custodians, data sources, and targets, before finalizing. If Microsoft 365 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.

#### 10.2.5.1 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 13](#).

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](#).

#### 10.2.5.2 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.

## 11 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.

### 11.1 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 68](#).
    - **Failed**—the collection failed. For more information, see [Graph Error Codes on page 68](#).
  - **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 61](#).

- **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 61](#).
- **Previews**—the status and estimated number of items and size of collection. This is available after starting a preview. For more information, see [Preview on the next page](#).
- **Custodian Details**—the status of the custodian and the source instance. This card also includes the filter criteria, items, size, and errors.

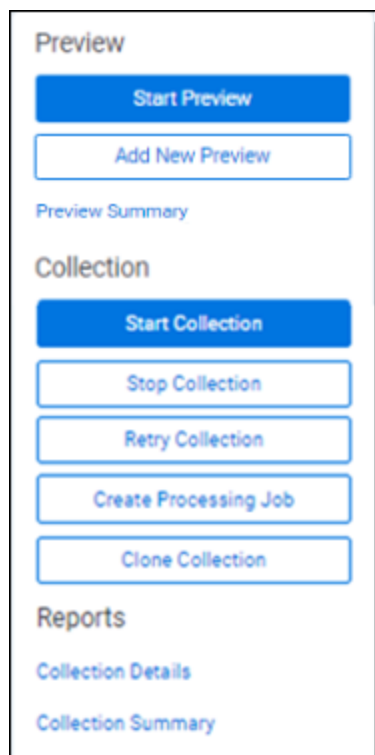
## 11.2 Viewing collected data

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.

## 11.3 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.



### 11.3.1 Preview

After setting up your collection job, you can preview the job. This is an inventory phase without running a full collection. You can see the estimated number of discovered items and collection size for each custodian target. These preview options help you decide to move forward or adjust your collection job.

---

**Notes:** Only available for Microsoft 365 Outlook mailboxes, calendars, contacts, and OneDrive. For more information, see [Microsoft 365 - Outlook data source on page 25](#) and [Microsoft 365 - OneDrive data source on page 17](#).

Inactive mailboxes are not included in preview.

---

#### 11.3.1.1 Start Preview

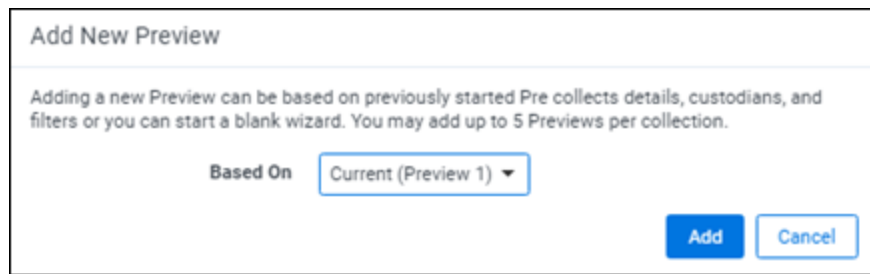
Click the **Start Preview** button to gain insight into the number of items and size of the collection as the collection is currently set up.

From here, you can start your collection or add a new preview.

#### 11.3.1.2 Add New Preview

Click the **Add New Preview** button to adjust your collection job setup. In the Add New Preview modal, you can add a new preview based on previously started collect details or a blank wizard. You can add up to five previews.





**Add New Preview**

Adding a new Preview can be based on previously started Pre collects details, custodians, and filters or you can start a blank wizard. You may add up to 5 Previews per collection.

Based On Current (Preview 1) ▼

**Add** **Cancel**

Selecting the **Blank Wizard** option takes you back to the Collection Details step. You then need to complete the collection wizard with a new setup.

From here, you can start your collection.

## 11.3.2 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.

### 11.3.2.1 Start Collection

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

### 11.3.2.2 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.

### 11.3.2.3 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.

### 11.3.2.4 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.

**Submit Collection to Processing?**

A new processing job will be created within the workspace's Processing application. If you clone the selected profile, a new profile will be created and assigned to the job. Otherwise the selected profile will be used.

Select a Workspace: Documentation ▼

Select a Processing Profile: Default ▼

Select a Document Numbering Prefix Option: Use Processing Profile Document Number Prefix ▼

Clone Profile: ☐

Submit Collection Cancel

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.

#### 11.3.2.5 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.

#### 11.3.2.6 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](#).

## 12 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.

---

### 12.1 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.

#### 12.1.1 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.

#### 12.1.2 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.

#### 12.1.3 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 a CSV file download of the results collected from Bloomberg, Box, iManage, Microsoft, Refinitiv Ikon, Slack, or X1 targets.

#### 12.1.3.1 Hash identifier - SHA-256

Inside the spreadsheet there is an electronic fingerprint named SHA-256. When collecting documents, Microsoft adds the SHA-256 hash identifiers and then stores the hashes. A user can verify the original file by matching the SHA-256 identifiers. For more information, see [Microsoft's Retention Policies](#).

The SHA-256 is included in the Results report file and the Collection details report files.

#### 12.1.4 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.

##### 12.1.4.1 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.

##### 12.1.4.2 Graph Error Codes

The Graph Error Codes category of error codes will occur if there is an issue with Graph when downloading an item. For more information, see Microsoft's Graph Errors documentation. There are different error categories. Handle each category error following instructions below. If the suggested resolutions don't fix the issue or if the code is not listed, contact [Relativity Support](#).

#### Transient

Transient errors appear in the report if the Microsoft Graph API has received too many requests in too short a time. If these errors appear, then the collection is putting too much pressure on external services. Retry the collection later.

- activityLimitReached
- quotaLimitReached
- serviceNotAvailable

#### Authentication

These errors deal with authentication of the Collect application. Check the Microsoft Azure application associated with the collection source instance and ensure it has the proper permissions.

- accessDenied
- notAllowed
- unauthenticated

For more information, see [Accessing Microsoft 365 tenants on page 17](#).

#### Modification

Modification errors appear when data changes between discovery and download. For example, moving data would cause a modification error. Restart the collection to resolve the error.

- itemNotFound
- resourceModified

## File

The Microsoft Graph API prevents Relativity from collecting items marked as malware. Items marked as malware will always error. Relativity doesn't collect these files. To download these items, you must download them manually.

- malwareDetected

The other error codes shouldn't appear in Errors file, as they either deal with the uploading of data (which Collect doesn't do) or they deal with a malformed request, which indicates a bug. If they appear, contact [Relativity Support](#).

## HTTP Errors

This error category occurs alongside Graph errors, as well as in a few other cases. For example, an HTTP error occurs when a file stream doesn't download. If the suggested resolution does not fix the issue or if the code is not listed, contact [Relativity Support](#).

Of the HTTP error codes, here are examples of some that may appear:

- **400: Bad Request**—the application requested a resource improperly. If this occurs, contact [Relativity Support](#).
- **401: Unauthorized**—the application doesn't have the proper permissions and the app key is correct.
- **403: Forbidden**—the application doesn't have the permissions and the app key is correct. These may also be associated with attempting to download a file with malware (see malwareDetected).
- **404: Not Found**—an item was moved between discovery and downloading. Restart the collection.
- **429: Too Many Requests**— the application has received more requests than it can handle. Retry the collection later.
- **504: Gateway Timeout**—this is related to the stability of the tenant being collected from. Retry the collection again later.
- **509: Bandwidth Limit Exceeded**—the application cannot support the amount of bandwidth needed. Retry the collection again later.

## Other Errors

**InvalidOperationException** ("The item's downloaded hash does not match Microsoft's reported hash value.") – this occurs if the downloaded item's hash identifier and Microsoft's hash identifier differs. This error usually indicates something happened with the download that caused the data to become corrupted and can represent a transient error. Retry running the collection.

**ArgumentException** ("Non-file attached to...") - these exceptions occur when something other than a file is attached to an event or message. Relativity does not collect these items.

There are messages indicating that there was an issue creating a VCard, MIME, or iCal object. These indicate that there was an error translating Microsoft's response on these items into files, and are usually bugs in the Collection application. contact [Relativity Support](#).

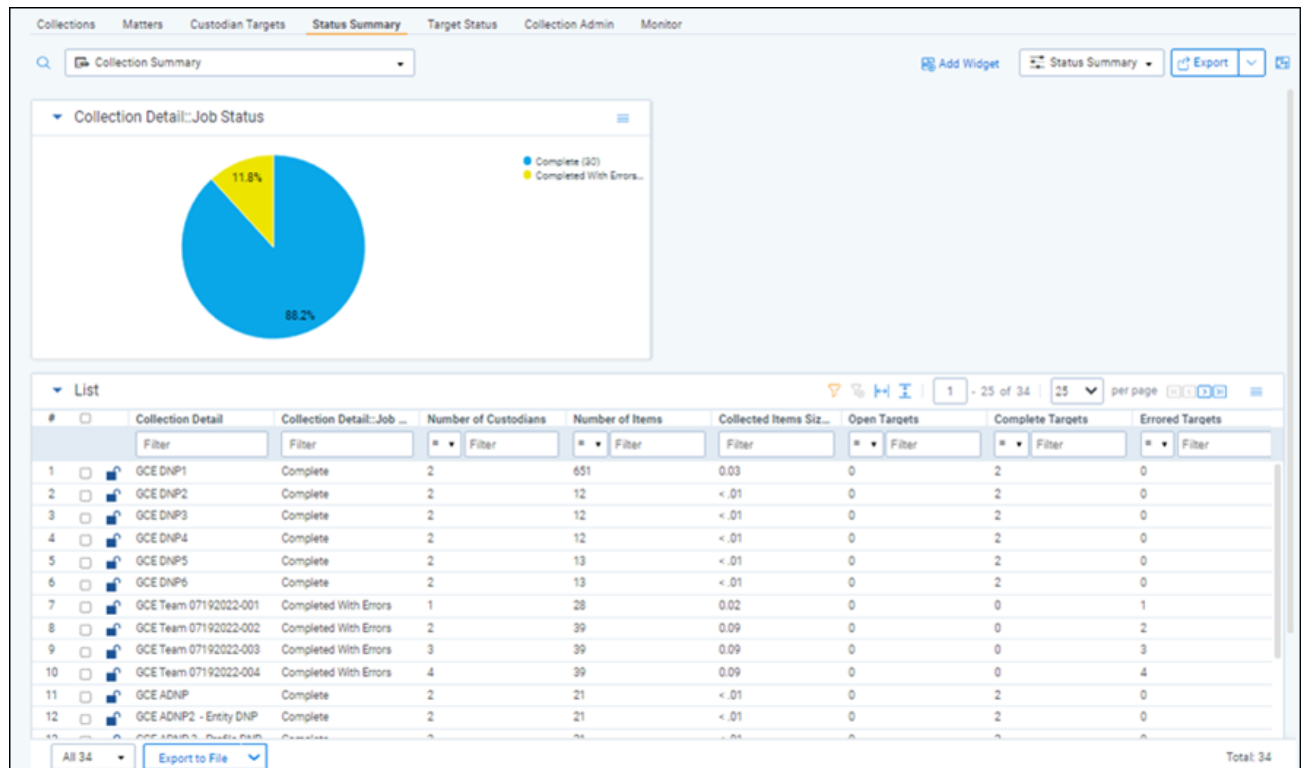
There are messages indicating problems writing files to the file share. In this case, download went correctly, but there is an issue with the Relativity File Share preventing the write. contact [Relativity Support](#).

## 13 Status Summary

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

### 13.1 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.



### 13.2 Reviewing job statuses

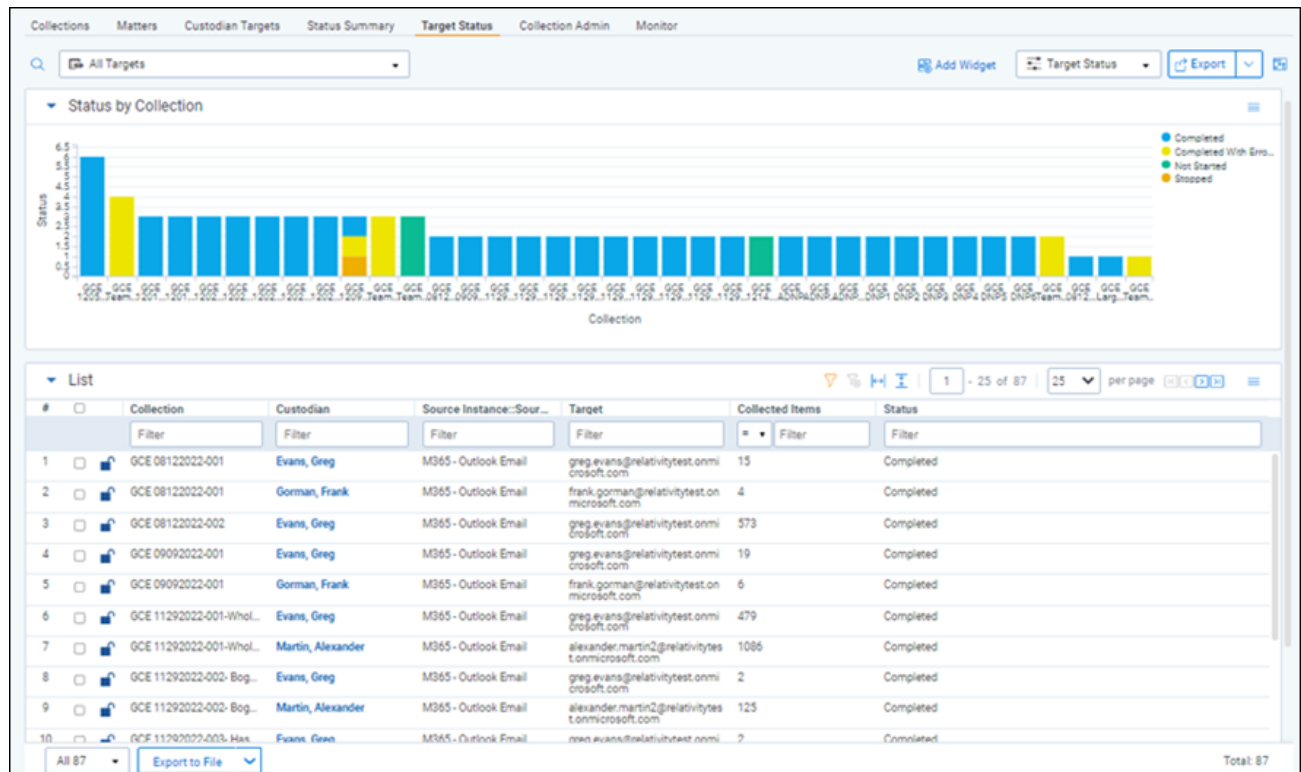
The job status dashboard is available after generating targets. To learn how to generate targets for a collection, see [Collection Summary on page 59](#). Once you generate targets, the dashboard organizes by collection jobs.

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 page 68](#).
- **Error**—the collection did not run successfully and couldn't collect from the target.

## 14 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.



## 15 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.

QUEUED	RUNNING	COMPLETED
<b>Test</b>	<b>bco custodian 203</b>	<b>T010 Test 1</b>
<b>bco custodian 201 ALL</b>	<b>1 of 2 collections completed</b>	<b>Beta Custodian202 Relativity Test OneDrive</b>
 <b>Beta Custodian201 Relativity Test Outlook</b>	 <b>Beta Custodian203 Relativity Test OneDrive</b> Completed 7762 files retrieved Elapsed time: 00:07:29	 <b>Beta Custodian202 Relativity Test OneDrive</b> Completed With Errors 3006 files retrieved Elapsed time: 00:04:51
 <b>Beta Custodian201 Relativity Test OneDrive</b>	 <b>Beta Custodian203 Relativity Test OneDrive</b> Retrieving 22987 out of 57501 files retrieved Estimated completion: 5/6/2019, 5:05:46 PM 39% 00:21:16	 <b>Beta Custodian202 Relativity Test Outlook</b> Completed 116 emails retrieved Elapsed time: 00:00:03
 <b>Beta Custodian201 Relativity Test Calendar</b>		
 <b>Beta Custodian201 Relativity Test Contact</b>		<b>bco Custodian 201</b>
		 <b>Beta Custodian201 Relativity Test Outlook</b> Completed 1010 emails retrieved Elapsed time: 00:00:16
		 <b>Beta Custodian201 Relativity Test OneDrive</b> Completed 2855 files retrieved Elapsed time: 00:04:10



## 16 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 56](#).

### 16.1 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 56](#).

### 16.2 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

This documentation (“**Documentation**”) and the software to which it relates (“**Software**”) belongs to Relativity ODA LLC and/or Relativity’s third party software vendors. Relativity grants written license agreements which contain restrictions. All parties accessing the Documentation or Software must: respect proprietary rights of Relativity and third parties; comply with your organization’s license agreement, including but not limited to license restrictions on use, copying, modifications, reverse engineering, and derivative products; and refrain from any misuse or misappropriation of this Documentation or Software in whole or in part. The Software and Documentation is protected by the **Copyright Act of 1976**, as amended, and the Software code is protected by the **Illinois Trade Secrets Act**. Violations can involve substantial civil liabilities, exemplary damages, and criminal penalties, including fines and possible imprisonment.

©2024. Relativity ODA LLC. All rights reserved. Relativity® is a registered trademark of Relativity ODA LLC.

## 17 Glossary

---

### A

---

#### **Admin**

An Admin is a Relativity system administrator.

#### **Agent**

An Agent is a process manager or worker that runs in the background of Relativity to complete jobs initiated by user actions.

#### **Analytics**

Analytics is a conceptual search engine that indexes files based on co-occurrences of words and recognizes concepts among documents; Analytics is supported by the mathematically-based latent semantic indexing (LSI) technology.

#### **Analytics Categorization Set**

An Analytics Categorization Set is a group of parameters used for gathering example documents that Analytics uses as the basis for identifying and grouping other conceptually-similar documents.

#### **Analytics Index**

An Analytics Index is an index that organizes and assess the semantic content of large, diverse and/or unknown sets of documents by searching for keywords and concepts and finding related documents based on words, phrases, or entire documents.

#### **Analytics Profile**

An Analytics Profile is a group of parameters used for specifying an Analytics Index's dimensions, concept noise words, dtSearch noise words, and filter configurations.

#### **API**

An API, or application programming interface, is a source code-based specification intended to be used as an interface by software components to communicate with each other; Relativity maintains an Import API and Services API.

#### **Append**

Append, as found in Append Only or Append/Overlay, is an option in the Overwrite setting on the Relativity Desktop Client that lets an admin to import only files whose control numbers do not already exist in the target workspace.

---

## **Application**

An Application is a customizable collection of Relativity objects that provides improved case and matter management.

## **Application Deployment System**

The Application Deployment System (ADS) is a Relativity component used to develop and implement custom solutions for improved case and matter management that lets an admin create, install, and delete applications directly in the web interface.

## **Application Library**

An Application Library is a repository from which an admin can select Relativity applications to import into a workspace through the web interface.

## **Assemblies**

Assemblies, also known as event handlers and syncs, are DLL files containing compiled source code used to apply special rules to coding forms.

## **Assisted Review**

Assisted Review is an application that uses Analytics categorization to teach Relativity how to determine whether a document is responsive or non-responsive, as well as what issues apply to that document so that the system can then determine how the rest of the documents in the data set should be coded.

## **Associative Object**

An Associative Object is an object type that an admin can link to another object type through a single- or multiple-object field on the original object; the relationship can be one-to-many or many-to-many.

## **Audit**

An audit is a recorded action listed in the History tab and through the View Audit button on individual objects.

---

## **B**

## **Bandwidth Tester**

The Bandwidth Tester is the tool inside Relativity's core reviewer interface used to test the capacity of a network connection.

## **Batch**

A Batch is a group of documents assembled based on criteria that an admin sets and then assigns to a reviewer for review.

---

## **Bates number**

A Bates number is an incremental number that occurs on every page of every document of a production set, as specified by an admin in the Begin Bates and End Bates fields on the Production Set layout.

## **Branding**

Branding is the application of redactions, headers, footers, and other modifications to a document in a production.

## **C**

---

## **CaseMap**

A CaseMap is a database solution for law firms practicing complex litigation that connects facts and objects; the Send to CaseMap feature in Relativity lets an admin bulk-send items from a workspace to this solution through a wizard.

## **Categorization**

Categorization is a process of Relativity Analytics in which an admin can gather large groups of documents based on a few examples that represent a single concept and centralize those documents in a Categorization Set.

## **Child object**

A child object is an object that lives under, and inherits permissions from, a parent object.

## **Choice**

A Choice is a value applied to a single or multi-choice list field that is used in coding fields to allow reviewers to record decisions on a document.

## **Client**

A Client is an object type associated with the User and Matter object types.

## **Clustering**

Clustering is the process of using a Relativity Analytics index to identify conceptual groups within an entire workspace or sub-set of data.

## **Command Line**

A Command Line is an interface or dialog between the user and a program, or between two programs, where a line of text (a command line) is passed between the two; an admin can use the Windows Command Line to import documents into Relativity, which allows for automation of document importing along with other parts of processing and integration.

---

## Compare

Compare is a system field (Relativity Compare) that compares the extracted text of two specified documents.

## Concept searching

Concept searching is the logic that drives Relativity Analytics by allowing a user to find information without a precisely phrased query but instead by applying a block of text against the database to find documents of similar conceptual content.

## Configuration table

The configuration table is a database table that contains settings and defaults values that correspond to functions inside Relativity.

## Conversation Index

Conversation Index is an indentation method for a view with a visualization type of Indented List in Relativity where an admin can display conversation threads in a document view; also pertaining to Conversation Index Parsing, which is a transform handler that parses the Microsoft Exchange field Conversation Index to use the related items functionality in Relativity.

## Core Reviewer Interface

The Core Reviewer Interface is the area in Relativity containing the viewer, Related Items pane, persistent highlight sets tree, and layouts in which the reviewer codes documents and applies redactions and markups.

---

## D

## Deduplication

Deduplication is a setting in the Processing object that, when enabled, removes duplicate files from the processing set data on either a global or custodial basis, depending on an admin's selection.

## DeNIST

DeNIST is a setting in the Processing object that, when enabled, separates and removes files found on the National Institute of Standards and Technology (NIST) list from the data an admin plans to process so that those files don't make it into Relativity when the admin publishes a processing set.

## Dependencies

Dependencies are the child and associative object relationships that an admin must delete when attempting to remove an object that has children and/or associative objects through the Delete Object Dependencies function.

---

## Discover Files

Discover Files is the phase of processing in which an admin can retrieve deeper levels of metadata not accessible during the previous phase (Inventory) and prepare that metadata for publishing to a workspace.

## Document

A Document is a record within a workspace and an available Object Type for an admin creating a View.

## Domain Parsing

Domain Parsing is a transform handler that extracts email domains from email addresses in a document.

## dtSearch

dtSearch is a search index option a user can perform proximity searches, stemming, and other advanced keyword searching options.

---

## E

### Email threading

Email threading is an option for displaying email chains with indentation in a view in Relativity.

### Errors

Errors is a tab available from Home that lists all errors that have occurred throughout the Relativity environment.

### Event Handler

An Event Handler is an assembly that helps facilitate the completion of document review and various other functions in Relativity by applying custom business logic to corresponding user actions.

### Extracted Text

Extracted Text is document metadata removed during file processing and placed in a separate file, which is then loaded into Relativity as part of a larger load file and contained in the Extracted Text field.

---

## F

### F1

F1 is a measure of the harmonic mean, or the weighted average of precision and recall, that Relativity Assisted Review uses to gauge the accuracy of its results and includes in several reports.

---

## Fact Manager

Fact Manager is an application where an admin can organize and analyze case details such as facts, issues, organizations, people, interview questions and documents, which then helps identify strengths and weaknesses in litigation strategy, and leads to better preparation for depositions, interviews, and trial.

## Favorites

Favorites is a feature on the greetings menu in which a user can bookmark their most visited areas of Relativity so that they can easily navigate to those areas after logging in, thus limiting the number of required clicks.

## Field

A Field is used to store Document metadata and coding values within Relativity.

## File Repository

A File Repository is a Relativity-accessible data structure stored on a server that contains files and directories associated with a workspace.

## Filtering

Filtering is a way to search for a specific single item or group of items within a list in Relativity.

## Finalization set

A Finalization set is a snapshot of a project Universe at a given time where the categorization values for documents in the universe are preserved from further changes by being copied to a separate database field. During Finalization the categorization values are prepended with a Finalization Set prefix to indicate their distinction from other Finalization Sets which may be created.

## Folder

A Folder is a container of documents in Relativity that are arranged in a hierarchy in the folder browser.

---

## G

## Group

A Group is a basic Relativity object with which one or more users is associated and in which an admin determines those users' permissions on a workspace-by-workspace basis.



---

## H

---

### **Handler**

A Handler is a set of rules used by a transform set to identify relevant content in a field.

### **History**

History is a tab containing audit records that track the actions performed by admins and reviewers throughout the workspace.

### **HTML alert**

An HTML alert is a custom message that appears when a reviewer opens a document in the core reviewer interface.

---

## I

---

### **Imaging**

Imaging is the process of converting a group of documents to images in Relativity using imaging profiles and sets.

### **Import API**

The Import API is an extensibility tool used to import processed data such as documents and metadata into Relativity without the need for the Relativity Desktop Client or a load file.

### **Indented List**

An Indented List is an option for displaying levels within an email relationship, such as a in a conversation thread, which allows for easier understanding of the order of information in the family.

### **Inline Tagging**

Inline tagging is a feature where a reviewer can tag sections of text within a transcript that are then available to reference through hyperlinks.

### **Inventory Files**

Inventory Files is the phase of processing in which an admin can eliminate irrelevant raw data from the discover process through a variety of preliminary filters that exclude certain file types, file locations, file sizes, NIST files, date ranges, and sender domains.

---

## K

---

### Keyboard Shortcuts

Keyboard Shortcuts are combinations of two or more keys that, when pressed, perform a task that would typically require a mouse.

### Keyword expansion

Keyword expansion is a searching method within Analytics for finding how different language is used to express identical or conceptually similar concepts and terms in an index.

---

## L

---

### Latency

Latency is the total time for a network packet to travel from the application on one server, through the network adapter, over the wire, through the second adapter, and into an application on another server; an admin can execute a latency test in Relativity through the bandwidth tester.

### Layout

A Layout is a web-based coding forms that gives reviewers access to view and edit document fields and complete specific review tasks.

### License Key

A License Key is a string of characters used to install a product, as found in the Apply License Key option in the License Console in Relativity.

### List Properties

List Properties are a heading on the field form where an admin can control how an item displays in a view.

### Lists

Lists are an option in Relativity for saving a group of items without having to specify the types of conditions required for a saved search, which means they remain constant unless someone replaces them with an existing list.

### Load Balancing

Load Balancing is the process of distributing a workload across multiple web servers, as found in the Enable User Load Balancing setting in the Servers tab in Relativity.

---

## Load File

A Load file is the file used to import data into a workspace through the Relativity Desktop Client.

## M

---

### Markup

Markups are highlights and redactions a reviewer adds to documents in the Relativity image viewer.

### Markup Set

A Markup Set is a securable sets of annotations and redactions available to reviewers for applying text redactions to documents in the viewer.

### Mass Operations

Mass Operations are single actions performed on multiple documents or objects at the same time, such as mass edit, move delete, produce, replace, image, print image, send to CaseMap export file, cluster, and process transcripts.

### Matter

Matters are basic Relativity objects associated with one or more workspaces, to which Clients are then associated (mirroring the billing structure of most law firms); matters are used to define different cases, disputes, or consulting instances that a firm may encounter with a client.

### MotD

MotD is the message of the day displayed to all users when they log in to Relativity.

### Move (Mass Operation)

Move is a mass operation an admin can use to move multiple documents to a new folder with one action.

### MyTerm

## N

---

### Native File

A Native File is a file format native to a program that other programs may not recognize. Native File pertains to the Native File Behavior setting on the Relativity Desktop Client, which an admin can use to import a load file into a workspace.

---

## Native Type

A Native Type is a Relativity-supported file type that an admin can import and image; Native Type pertains to the Native Types tab and list, which an admin references when selecting file types to restrict from imaging.

## Nested

Nested is a term used when referencing Relativity tabs that appear under a parent tab.

## Network Connection

A Network Connection is an association that a network layer establishes between two users so they can transfer data.

---

## O

## Object

An Object is a workspace item that stores information and can connect to other workspace objects.

## Object-Level Permissions

Object-Level Permissions are per group security rights to view, edit, delete, add, and edit security for Relativity objects such as fields, tabs, workspaces, and layouts. Security rights work jointly with tab visibility or browser permission.

## OCR

OCR is an industry acronym for Optical Character Recognition, a Relativity feature that uses pattern recognition to identify individual text characters on a page—such as letters, numbers, punctuation marks, spaces, and ends of lines—and translates text in images, such as scanned and redacted documents, into actual text characters.

## Overlay

An Overlay is a setting in the Relativity Desktop Client that replaces existing documents in Relativity with new import files whose control numbers already exist in the target workspace.

## Override Production Restrictions

Override Production Restrictions is a permission that lets an admin override the setting in the production restrictions option on the workspace details page and produce documents that contain conflicts defined by these restrictions.

## Overturn

An Overturn is a document that was coded one way in one finished round and then coded another way in a subsequent finished round.

---

## Overwrite

Overwrite is a setting in the Relativity Desktop Client that erases existing documents in Relativity and replaces them with new import files.

## P

---

## Persistent Highlight Set

A Persistent Highlight Set is a reusable, transferable set of persistent highlight specifications a reviewer can select in the Viewer to assist in document review.

## Picker

A Picker is a pop-up dialog where an admin can select objects and values when creating fields, filtering, setting up saved searches, and setting other configurations in a Relativity workspace.

## Pivot

A Pivot is a Relativity feature an admin can use to quickly analyze case data to identify trends and patterns in a case by summarizing data in tables and charts to simplify analysis.

## Process Transcripts

Process Transcripts is a mass operation that reads an ASCII text file, identifies page breaks, and parses out the transcript content into a hyperlinked word index for fast searching.

## Processing

Processing is a Relativity feature used by an admin to ingest raw data directly into a workspace for eventual search and review without the need for an external tool.

## Produce

Produce is a Processing term used when preparing documents, electronically stored data, and other tangible items for submission to a party during the discovery phase of litigation.

## Production Set

A Production Set is a saved set of parameters that Relativity uses when running a production. A Production set includes a markup set for redactions, document numbering, image placeholder, branding, and other settings.

## Propagation

Propagation is a setting that automatically forces a coding value to a specified group of related items such as duplicates, family, similar documents, etc. during document review.

---

## **Publish Files**

Publish Files is the final stage of processing, in which an admin can load processed data into the environment so reviewers can access the files.

## **Q**

---

### **Queue**

A Queue is an area of Relativity that stores jobs that have already been created and are in some stage of being completed, whether their status is pending, waiting, processing, stopped due to error, or completed.

## **R**

---

### **RDC**

RDC is the Relativity Desktop Client, which an admin uses to import a document load, image, and production files to Relativity and to export production sets, saved searches, and folders, as well as to both import and export custom Relativity applications and object information.

### **Redirection Attempts**

Redirection Attempts is the number of times a user is unable to redirect to the URL provided.

### **Redistributable**

Redistributables are software packages that can be redistributed by a third party as part of its own software. For example, Microsoft Visual C++ 2010 Redistributable, which is required to operate certain versions of Relativity.

### **Related Items**

Related Items are documents deemed relational based on their similar content and grouped together into duplicates and email families. Related Items are accessible via the related items pane in the core reviewer interface.

### **Relativity Binders**

Relativity Binders is an iPad application where users can securely view evidence and prepare narratives on their iPads. With this app, users can view, annotate, and organize documents from Relativity. The app synchronizes and saves the user's annotation information in Relativity.

### **Relativity Binders Admin**

Relativity Binders Admin is an application where users can generate PDFs from a set of documents in Relativity and then provide those PDFs as a "binder" for Relativity Binders iPad app users.

---

## Relativity Dynamic Object

A Relativity Dynamic Object is an object that an admin can customize and link to documents and to each other to create powerful custom applications.

## Repeated Content Filter

A Repeated Content Filter is an object under the Analytics tab that removes text that doesn't contribute to the conceptual content of a document, such as confidentiality footers or standard boilerplates, which then prevents the Analytics engine from discovering unwanted term correlations.

## Replace (mass operation)

Replace is a mass operation that an admin can use to replace existing field text with new content.

## Resource Files

Resource Files is a Relativity feature in which an admin can upload files or assemblies with custom code for use in applications and provide custom functionality for a Dynamic Object or other features.

## Resource Pool

Resource Pool is a set of servers (agent and SQL) and file repositories associated with a workspace based on litigation matter, location, or other categories.

## Review Manager

Review Manager is an application where admins can generate forecasts, insights, and optimizations to help track the time and cost of review and provides graphical reports of key review metrics help streamline workflow and implement best practices.

## Round

A Round is a set of documents that are categorized by Assisted Review and checked by a reviewer for accuracy.

## S

---

## Sample set

A Sample set is the group of documents produced by Assisted Review to be submitted to reviewers as a means of training the system. A Sample Set is randomly created by Assisted Review. The number of documents in the Sample Set is determined by the overall size of the Data Set, in conjunction with one of the following sampling types: statistical sampling, percentage sampling, or fixed sample size.

---

## Saved Search

A Saved Search is a saved set of admin-defined criteria with custom queries and unique views used to return the latest documents that meet the defined criteria.

## Script

A Script is a SQL-based command that admins can use to customize and augment Relativity functionality. Scripts are deployed with Relativity and reside in the Relativity script library.

## Search Index

A Search Index is an admin-defined set of specifications to facilitate a search across content and isolate individual terms within individual documents.

## Search Terms Report

A Search Terms Report is a Relativity feature where an admin can enter a list of terms or phrases and generate a report listing those words' frequencies in a set of documents.

## Servers

Servers is a tab available from Home in which an admin can add new resource servers, including Analytics and processing servers, to the environment and view a list of the various servers currently in use in the environment.

## Services API

Services API is a set of web services used to programmatically create, read, update, delete, and query some of the most commonly used Relativity object/artifact types.

## Similar document detection

Similar document detection is a feature within Analytics that identifies groups of highly related documents based on conceptual similarity and displays them as related items in Relativity.

## Skip

Skip is a feature that accelerates document review by advancing a reviewer to the next document in the queue that meets the condition of the view when propagation is enabled.

## SQL Server

SQL Server is a relational database management system and relates to the SQL Server setting on the resource pool layout, to which an admin can add the name of an SQL Server available on the network.



---

## Structured Data Analytics

Structured Data Analytics is an operation within Analytics that analyzes text to identify the similarities and differences between the documents in a set so that users can quickly assess and organize a large, unfamiliar set of documents. Using Structured Data Analytics can shorten review time, improve coding consistency, optimize batch set creation, and improve Analytics indexes.

## Summary Report

A Summary Report is an aggregate tally of field values that an admin can run from the Summary Reports tab.

## System admin

A system admin is a Relativity admin with rights to view every item within a Relativity environment, including access to all admin tabs from Home, an admin can create and edit new clients, matters, users, groups, and views, among other features.

## System Objects

System Objects are system components such as fields, views, layouts, and groups that are intrinsic to Relativity and can't be modified or removed.

---

## T

### Tab

A Tab is an interface component that gives the admin or reviewer access to an assortment of Relativity functionality.

### Tally/Sum/Average

Tally/Sum/Average is a mass operation to tally, sum, or average the values of fixed-length text, choice, user, and number field types associated with documents and objects. This feature is used to determine the number of pages in a print job or production.

### Textual near duplicate

Textual near duplicate is an option within Structured Data Analytics that identifies records in which most of the text appears in other records in the group and in the same order. This option returns a percentage value indicating the level of similarity between documents.

### Transcript

A Transcript is a document version of an attorneys' dictation made during litigation.

---

## Transform Set

A Transform Set is a Relativity feature that uses handlers to analyze and extract the contents of one field and copy them to another.

## U

---

### URL

A URL, or Uniform Resource Locator, is a web address that pertains to a field on the servers layout, the WebService URL field on the Relativity Desktop Client, the Download Handler URL field on the workspace layout, and the Relativity Analytics Server field on the Analytics Index.

### User

A User is an individual with access to the Relativity environment.

### Utilities

Utilities are settings in Relativity that allow an admin to manage system keyboard short-cuts, download the Relativity Desktop Client and the viewer installation kit, and view users' personal items.

## V

---

### View

A View is a customizable list of items in Relativity from which a user can sort and filter to locate specific items.

### Viewer

The Viewer is the area of the core reviewer interface in which document review takes place. It displays loaded forms of documents from the workspace and provides options for controlling the mode in which those documents display. Reviewers can apply markups, redactions, and persistent highlights to documents in the viewer.

## W

---

### Web API

A Web API is a defined set of HTTP request messages along with a definition of the structure of response messages; Web API pertains to one type of server displayed on the Servers tab and available to associate with a resource pool.

### Web Server

A Web Server is a server that delivers content to Relativity to make it accessible through the Internet; Web server pertains to the servers displayed on the Servers tab that are available to associate with a resource pool.

---

## Workspace

A Workspace is a securable document repository used to facilitate productions, witness testimony, and other documents in which admins and reviewers conduct searches for relevant material and set up Views to organize that material.

## Workstation

Workstation is a general term for the platform that hosts the software, hardware and utilities required to operate Relativity.

## X

---

## XML

XML is a markup language that defines a set of rules for encoding documents in a format readable by both humans and machines.

## 18 Index

### C

Collect 56, 67

Collect wizard 56