Connect: Primary contact

Enabling RelativityOne Connect

Enabling Connect and connecting two or more of your Relativity instances requires your RelativityOne primary contact to complete a RelativityOne Connect Request Form. This request form needs to be completed by both organizations' RelativityOne primary contacts.

To begin using RelativityOne Connect, the primary RelativityOne contact at your organization needs to navigate to the Community site.

As your organization's primary RelativityOne contact, navigate to the Community site. In the Community site, navigate to RelativityOne Connect Request Form.

1. In the top navigation menu, click **Support**.

2. On the Support page, click the **Submit or resume** button under RelativityOne Requests.

   Notes: If you don't see the RelativityOne Requests section, you are not the RelativityOne Primary Contact. Please make sure you are logged in as the primary contact to move forward in requesting a form.

3. In the RelativityOne Request page, click the **Choose Request Type** drop-down menu.

4. Select **RelativityOne Connect**.

5. Click **Next**.

This opens the RelativityOne Connect Request Form.

RelativityOne Connect Request Form

RelativityOne Connect enables enterprises, law firms, and service providers to securely connect their RelativityOne instances and collaborate across organizational boundaries. The new capability facilitates seamless data sharing across all workspaces that users have been granted access facilitating increased productivity and security.

To request a secure connection, please submit the form below.

Name:

Email:

* INSTANCE NAME OF **YOUR** RELATIVITYONE TENANT

(To find an instance name, click About Relativity in the user flyout menu and it will be below the RelativityOne version number in the format R1 - [Name] - [Number])

* INSTANCE NAME OF THE RELATIVITYONE YOU WANT TO CONNECT TO (See value of Instance Instance Setting)

(To find an instance name, click About Relativity in the user flyout menu and it will be below the RelativityOne version number in the format R1 - [Name] - [Number])

PAUSE   PREVIOUS   NEXT

In the request form, confirm that the name and the email address match your information. Then continue filling out the form by entering the instance name of your RelativityOne tenant and the instance name of the RelativityOne instance that you want to connect to by completing the following fields:

- **Instance Name of your RelativityOne tenant**—the name of your organization's instance.
- **Instance Name of the RelativityOne tenant you want to connect to**—the name of the instance name that you want organization's instance to connect to.

Once entered, click **Next**. Confirm the request was submitted and click **Finish**.

RelativityOne Connect Request Submitted

Thank you for submitting your request for **RelativityOne Connect**. Your request has been submitted as a ticket # 02466799. You can manage this and other support tickets from your personalized home page or from the support page.

FINISH

Once submitted, Relativity can confirm the RelativityOne primary contacts email addresses and instance names. Once confirmed, a new authentication provider option is available when updating a user's login method.

Notes: To connect to more than one RelativityOne instance, you will need to submit multiple requests.

Once the request has been submitted, Relativity can confirm the RelativityOne primary contacts email addresses and instance names. Once confirmed, a new authentication provider option is available when updating a user's login method.

Finding instance names

Find the instance names in the User options drop-down menu. Copy the instance name from your instance and retrieve the other instance name.
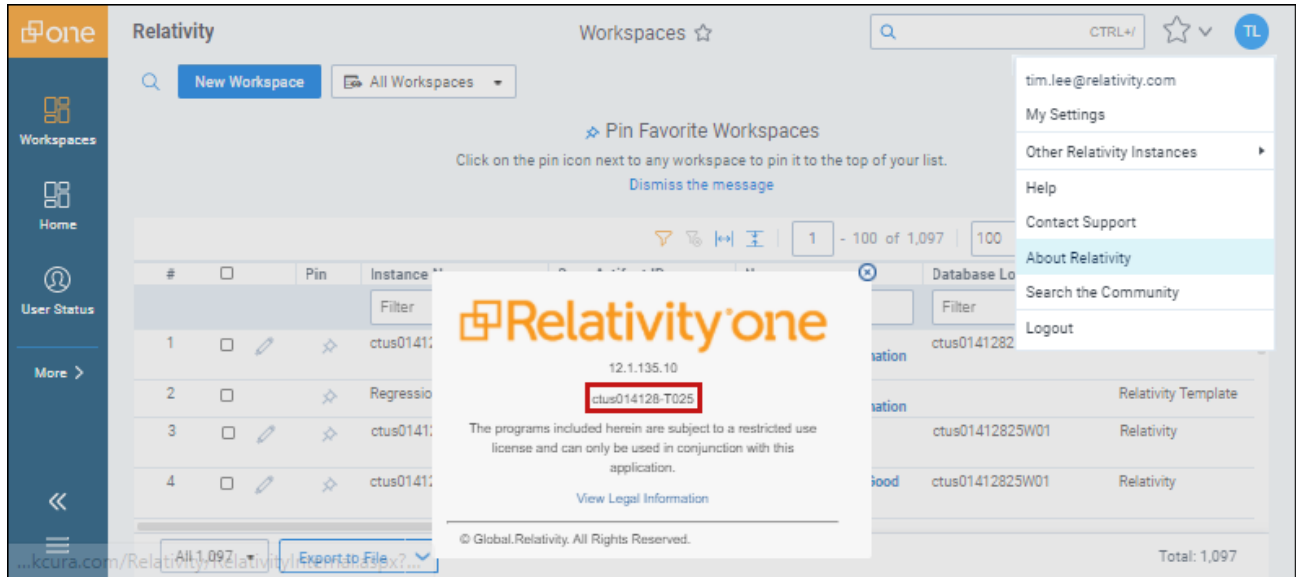
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