Relativity one

RelativityOne Integration Points Guide

July 2, 2025

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Table of Contents

1 Integration Points **5**

1.1 Integration Points scenarios 5

2 Installing Integration Points **6**

2.1 Installing Integration Points 6

2.2 Security permissions 6

3 Integration Points profiles **10**

3.1 Creating Integration Point profiles 10

3.2 Copying Integration Point profiles 13

3.2.1 Configuring an Integration Point Profile for copying 14

3.2.2 For Setup 14

3.2.3 For Connect to Source 14

4 Importing data through Integration Points **15**

4.1 Considerations 15

4.2 Creating an import Integration Point 15

4.2.1 Import sources 15

4.3 Importing a .csv file 16

4.3.1 Setup 16

4.3.2 Connect to source 18

4.3.3 Map fields 19

4.4 Importing LDAP 21

4.4.1 Setup 21

4.4.2 Connect to source 23

4.4.3 Map fields 24

4.5 Importing a document load file 27

4.5.1 Setup 27

4.5.2 Connect to source 29

4.5.3 Map fields 31

4.6 Importing an image load file 33

4.6.1 Setup 33

4.6.2 Source information 35

4.7 Importing a production load file 37

4.7.1 Setup 38

4.7.2 Source information ... 39
4.8 Importing from Microsoft Entra ID ... 41
4.8.1 Setup ... 42
4.8.2 Connect to source ... 43
4.8.3 Map fields ... 44
4.8.4 Reporting on Microsoft Entra ID imports ... 46
4.9 Manually running the import job ... 46
4.10 Downloading the error file ... 47
4.11 Disabling a scheduled Integration Point job ... 47
4.12 Scheduler date format considerations ... 47
4.13 Automatically stopping a scheduled job that repeatedly fails ... 49
5 Exporting data through Integration Points ... 51
5.1 Exporting a folder to load file ... 51
5.2 Exporting a folder and subfolders to a load file ... 60
5.3 Exporting a production to a load file ... 68
5.4 Exporting a saved search to a load file ... 76
5.5 Exporting to a Relativity workspace ... 84
5.6 Running the export job ... 84
5.6.1 Stopping and restarting an export job ... 85
5.7 Stopping (disabling) an Integration Point from promoting data ... 86
5.8 Scheduler date format considerations ... 87
5.9 Automatically stopping a scheduled job that repeatedly fails ... 88
6 Transferring (promoting) data between workspaces ... 90
6.1 Considerations ... 90
6.2 Exporting to a Relativity workspace ... 90
6.2.1 Considerations ... 90
6.2.2 Setup ... 91
6.2.3 Connect to Source ... 94
6.2.4 Map Fields ... 95
6.3 Mapping saved searches ... 100
6.4 Working with transferred documents ... 100
6.4.1 Reusing coding decisions ... 101
6.5 Calculating integration point job statistics on-demand ... 101
7 Monitoring job history and errors ... 104

7.1 Job History 104
7.1.1 Viewing job history details 105
7.2 Job History Errors 106
7.2.1 Item-level errors versus job-level errors 108
7.3 Troubleshooting job history errors 108
8 Viewing destination workspaces 111
9 Microsoft Entra ID provider 113
9.1 Registering an Azure application and credentials 113
9.2 Finding Azure credentials 114
9.3 Removing application access 115

1 Integration Points

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

Integration Points offers a solution to configure integrations from third party systems to Relativity objects and between Relativity workspaces. For more information, see Transferring (promoting) data between workspaces on page 90.

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

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

Since the Integration Points does not offer Full Name field calculation for Custodian/Entity object, the field is not available as an option for mapping. If you need to update the Entity object, please use the LDAP provider, which allows new records to be added with a field other than Full Name as the identifier. Alternatively, you may consider using Import/Export for Custodians/Entities updates.

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

1.1 Integration Points scenarios

Using Integration Points as a developer

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

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

Using Integration Points as an end user

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

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

2 Installing Integration Points

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

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

Note: If you are a current RelativityOne user, and you want to install or upgrade this application, you must contact the Customer Support team.

2.1 Installing Integration Points

Since Integration Points uses the ADS framework, you have the following options available for installing Integration Points in your environment.

- **Install Integration Points from the Application Library** - If you add the Integration Points application to the Application Library, you can install it to the current workspace, or to multiple workspaces at once, from the Application Library.
- **Install Integration Points from an external file** - You can import the Integration Points application into your workspace from an external file if it has not been added to the Application Library.

Once you install Integration Points application, the necessary Integration Points agents will be deployed automatically.

2.2 Security permissions

The following tables provide detailed breakdowns of the security permissions required to use Integration Points.

To submit a job for a non-Relativity source provider (FTP, LDAP, or Load File) and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Destination	Destination RDO	View, Edit, Add
Destination	Allow Import	Admin operation

To submit a job with Relativity as the source provider and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Source	Document	View, Edit
Source	Search	View, Edit, Add
Source	Advanced & Saved Searches • The saved search that you use for the integration point must have an owner of Public.	Browser
Source	Tab Visibility	Workspace Details
Destination	Destination Workspace	View, Edit, Add
Destination	Allow Export	Admin operation
Destination	Tab Visibility	Workspace Details

If you are creating an integration point for a non-Relativity source provider (FTP, LDAP, or Load File), Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit • Edit is required for adding Job History RDO's.
Source	Job History	View, Edit, Add
Source	Job History Error	View, Edit, Add • Edit is required to mark errors as new and expired

If you are creating an integration point with Relativity as the source provider, Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Destination workspace	View, Edit, Add • Edit is required to rename destination workspaces.
Destination	Manage Object Types • This is required to create new object types.	Admin operation

Workspace	Object/operation/tab	Permission type
Destination	Source workspace	Add, Edit • Edit is required for situations when Relativity renames the destination workspace upon a source workspace name change.
Destination	Source job	Add

To view an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Job History	View
Source	Integration point	View
Source	Integration point type	View

To create and edit an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit, Add • Edit is only required if you're editing the integration point. • Add is only required if you're creating the integration point.
Source	Integration point type	View
Destination	Allow Import	Admin operation

To create an integration point with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

To create an integration point with any source provider from an integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View

To view any integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View
Source	Source provider	View
Source	Destination provider	View
Source	Integration point type	View

To create and edit an integration points profile with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration Point Profile	View, Edit, Add • Edit is only required if you're editing the integration point profile. • Add is only required is you're creating the integration point profile.
Source	Integration Point Type	View
Source	Source Provider	View
Source	Destination Provider	View
Destination	Allow Import	Admin operation

To create and edit an integration points profile with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

If you do not have sufficient permissions and you attempt to perform either of the following actions, you will see an error message stating "You do not have sufficient permissions. Please contact your system administrator." In each case, Relativity creates an error listing all missing permissions.

- Loading the integration points console or clicking Run Now or Retry:
  - If the error occurs after a button click, the message is prefixed with, "Failed to submit integration job."
  - If the job is a retry job, the prefix reads, "Failed to submit the retry job."
- Saving an integration point after creating a new one or editing an existing one.

Note: Integration points is tenant-aware. This means that workspace admins within a tenancy receive an error if they attempt to push to a workspace they do not have permissions to. This error occurs when they click Run Now on the integration point that they create to push documents to review.

3 Integration Points profiles

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

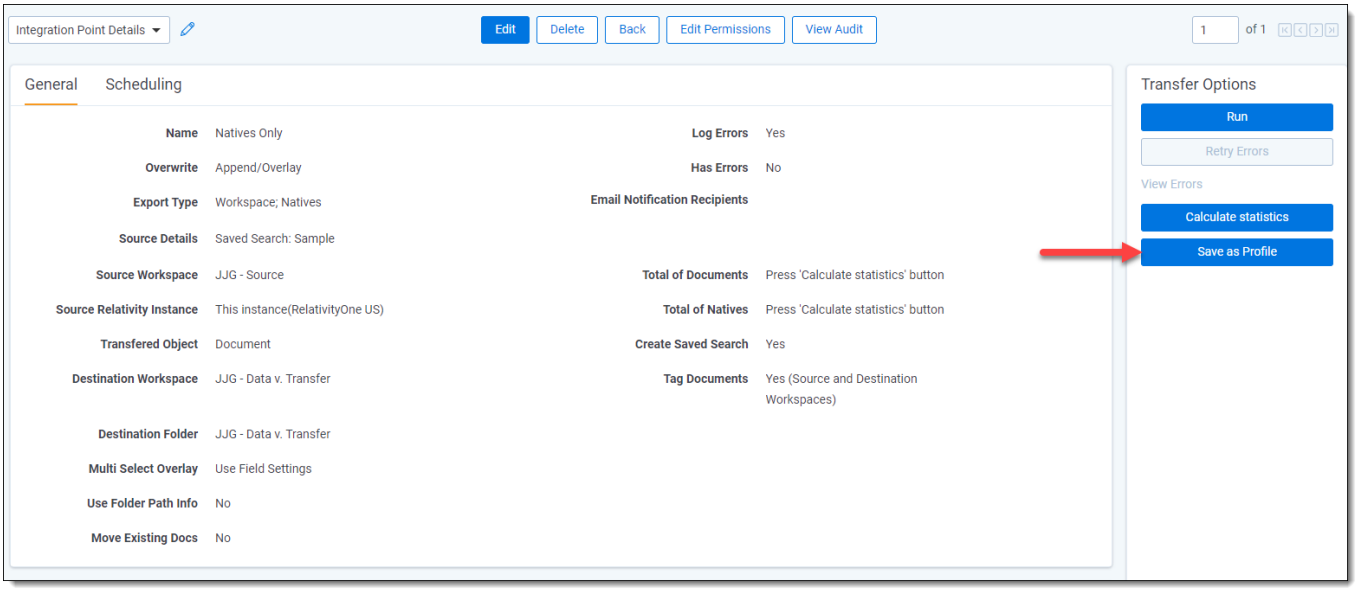
You have the option of creating and saving Integration Points profiles, which can be used to run future common import or export jobs through Integration Points without having to recreate them each time. The profiles can be specific to each data source so that you can reuse the settings and avoid having to remap fields multiple times.

3.1 Creating Integration Point profiles

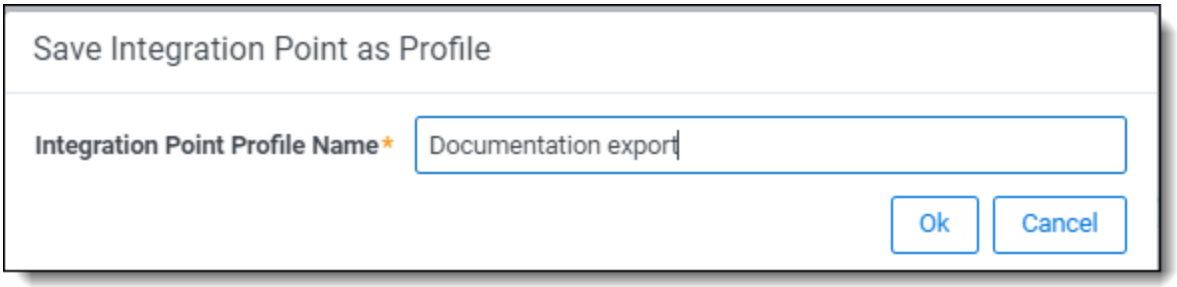
You can create in Integration Point profile through the Integration Point Profile tab. Or, if you are in the process of creating or editing an Integration Point job, you can save it as a profile for future use from the Transfer Options console. Both methods are described below.

To save a newly created or edited integration point as a profile, follow the steps below:

1. While on the create or edit Integration Points window, click the **Save as Profile** button on the Transfer Options console.

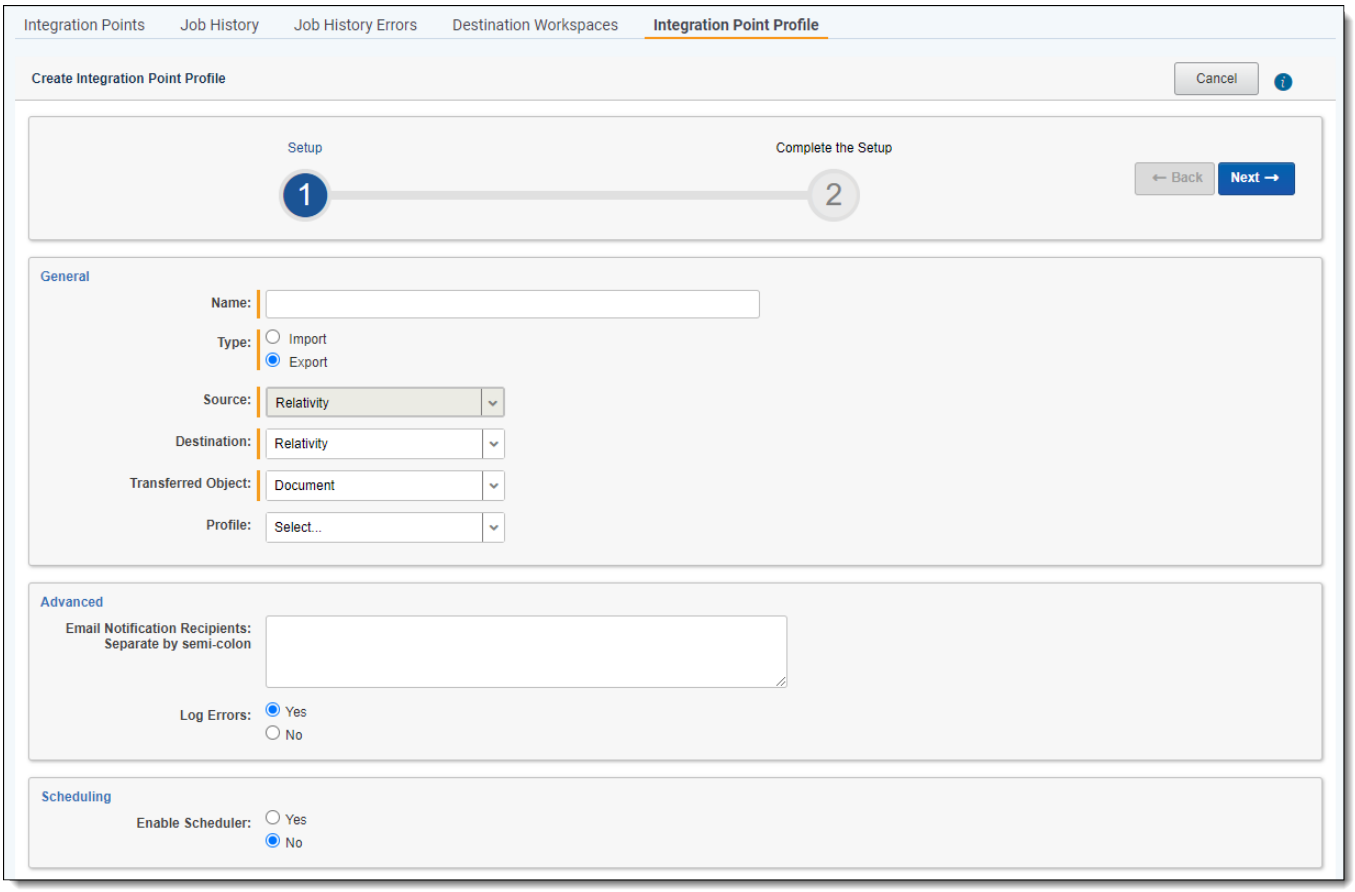


2. Enter a descriptive name to help identify the profile in the **Integration Point Profile Name** field and click **Ok**. Note that the Integration Point Profile Name field defaults to the name you originally gave the integration point you created. You can change it, if desired, or keep it as is.

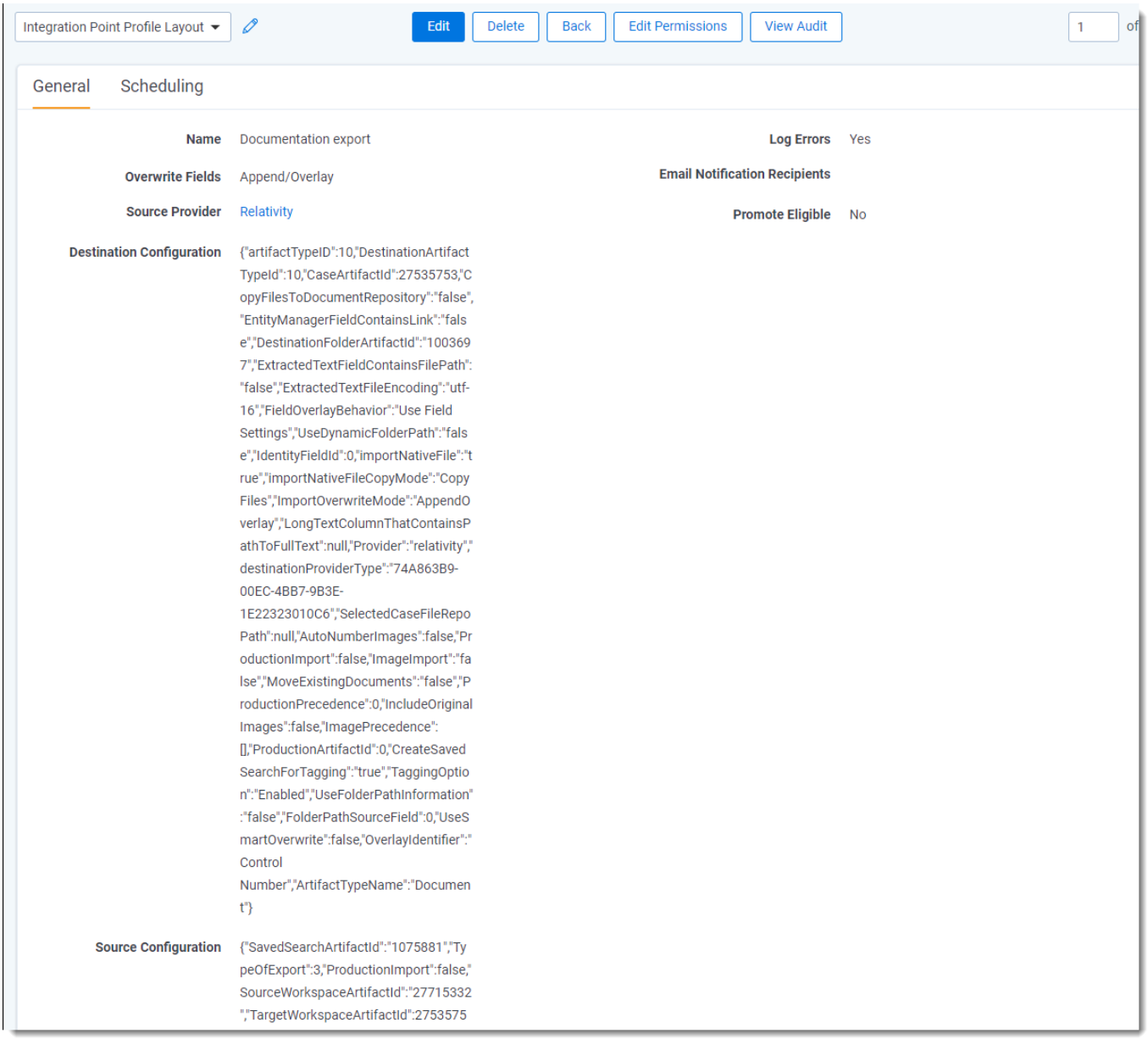


To create a profile through the Integration Point Profile tab, follow the steps below:

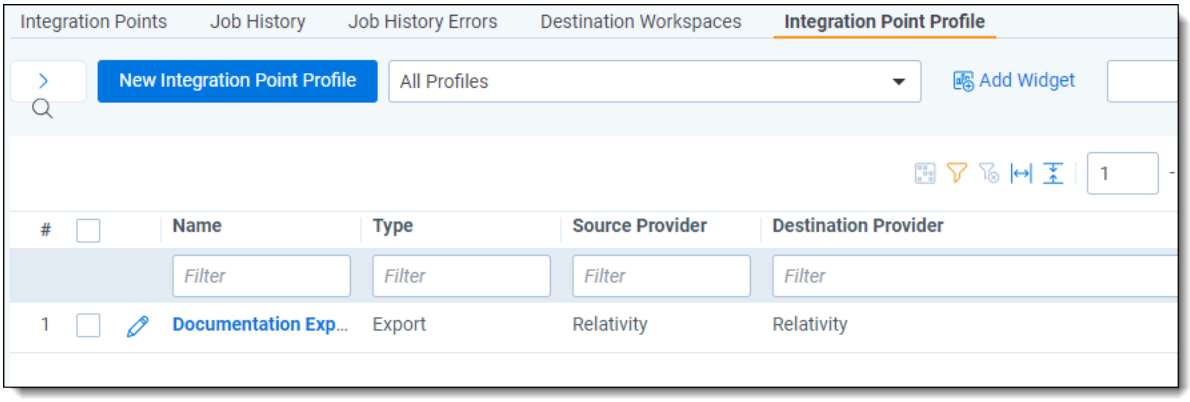
1. Select the **Integration Point Profile** tab.
2. Click **New Integration Point Profile**.
3. Complete the required fields as needed. The fields and layouts for creating a profile here are identical to those for creating any integration point that you intend to run. For more information, see Importing data through Integration Points on page 15 or Exporting data through Integration Points on page 51.



4. Once the profile is saved, you do not have the option to run it. Instead, you see a detailed layout of the profile you just created.

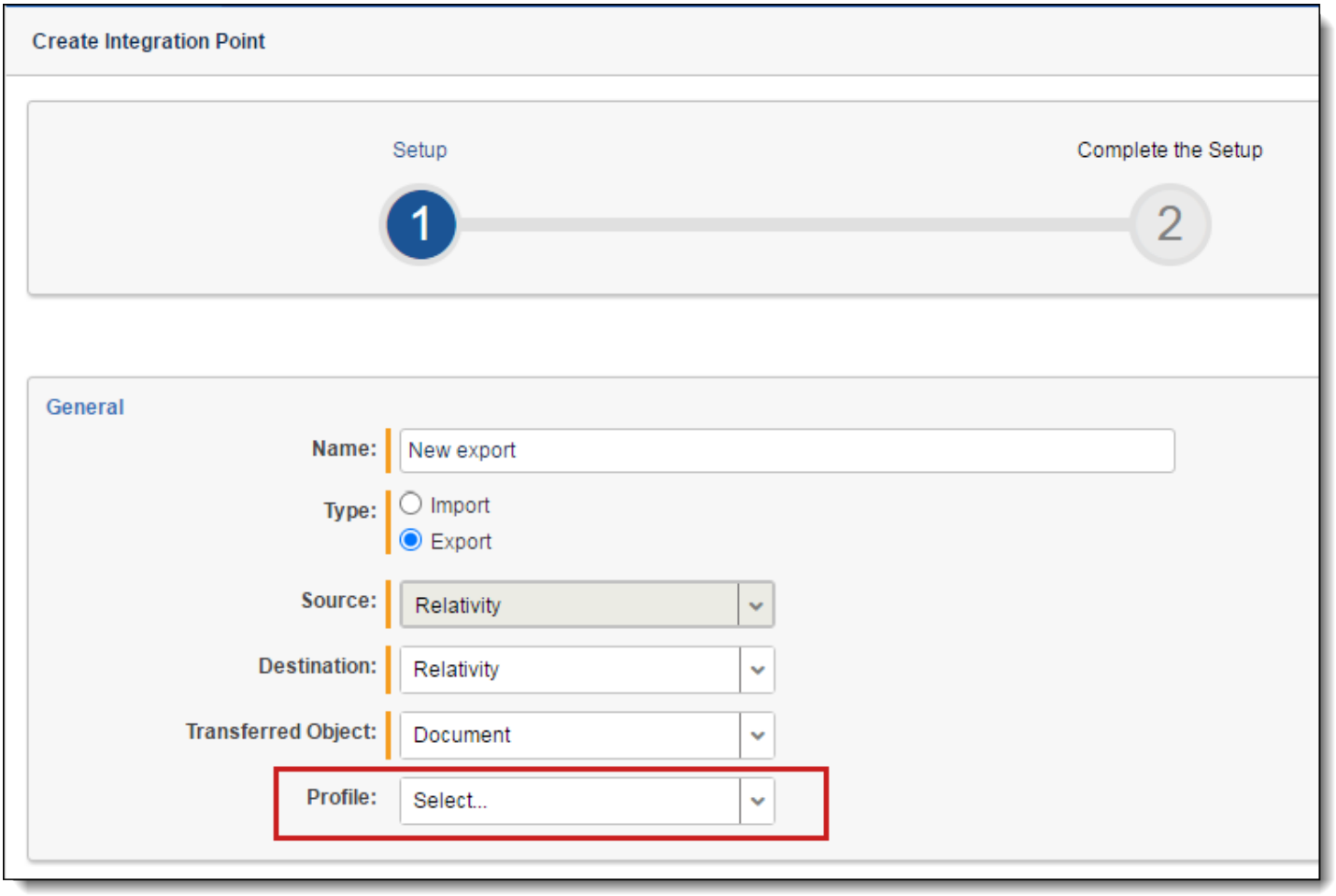


5. Once a profile is saved, it's visible in the Integration Point Profiles tab.



Note: To configure an Integration Point profile that can be copied to another workspace, see Configuring an Integration Point Profile for copying on the next page.

Once the profile is created, you have the option of applying it to a new Integration Point by selecting it in the **Profile** field on the Setup layout.



If the Destination workspace is changed after the fields have been mapped, the fields will automatically be remapped. The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. This mapping occurs so that the integration points job will not fail. Therefore, if the source workspace fields cannot match to the new destination workspace fields, those unmatched fields are presented at the end of the mappings list for easy identification. Relativity also displays a message to inform you that the original source fields from the profile were mapped with corresponding fields from the destination workspace.

3.2 Copying Integration Point profiles

You can copy the configuration of a Relativity Integration Point profile from a template workspace to a new workspace as long as the profile's Type field is set to **Export** and the Source and Destination fields are set to **Relativity**. This profile configuration is considered a non-document object. For a list of non-document objects that can be copied, see the Admin Guide. Once copied to the new workspace, the profile's fields are mapped and are editable.

Note: If the Integration Point Profile configuration has the Type field set to Import or Export and the Destination field set to Loadfile, it will not be copied to the new workspace.

3.2.1 Configuring an Integration Point Profile for copying

In order to copy a profile to another Relativity workspace, it has to be configured a certain way.

To properly configure an Integration Point profile so that can be copied to another Relativity workspace, set the fields as shown below.

3.2.2 For Setup

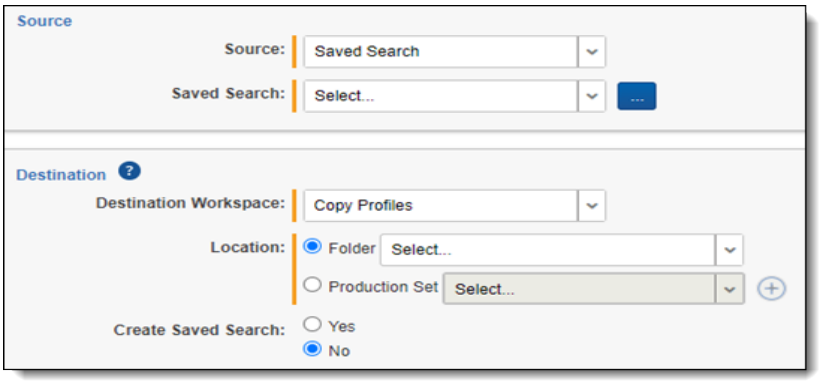
- **Name**—enter a profile name of your choice.
- **Type**—select **Export**. This field must be set to Export for the profile to be copied.
- **Source**—select **Relativity**. This field must be set to Relativity for the profile to be copied.
- **Destination**—select **Relativity**. This field must be set to Relativity for the profile to be copied.
- **Transferred Object**—select the Document or non-document object meta data you want to sync to the destination workspace. The non-document object must already exist in the destination workspace.
- **Profile**—select a profile of your choice.

3.2.3 For Connect to Source

- **Source**—defaults to saved search.

  Notes: When updating the connection to source for the copied profile, the Source field defaults to Saved Search. The Saved Search field is empty and you need to select the saved search of your choice whether it's the same saved search as the original profile or a different saved search.

- **Saved Search**—select the saved search of your choice.
- **Destination Workspace**—select the destination workspace of your choice.
- **Location**—select a location of your choice.
- **Create Saved Search**—select Yes or No.



Once the above fields are configured, the profile is ready to use for copying.

When you are ready to create a new workspace using the profile, go to Workspaces and click the **New Workspace** button. Then, click **Select** next to Template Workspace and select the workspace in the list with the Integration Points profile that you want to use. For more information on creating a workspace template, see the Admin Guide.

4 Importing data through Integration Points

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

Integration Points provides you with the ability to import a .csv file, LDAP, or load file directly into your workspace, and schedule future or recurrent import jobs.

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see Terms of Use.

4.1 Considerations

Consider the following before importing data through Integration Points:

- Changing root folder permissions during import is not a supported workflow.
- Although importing and exporting a load file is possible in Integration Points, Import/Export is the main application recommended for a stable and efficient load file import and export.
- All integration points jobs are fully editable after run.

4.2 Creating an import Integration Point

The general workflow for creating Integration Points to import data are listed below. For specific details and parameters surrounding each type of integration point you need to create, refer to the other sections in this topic:

1. Navigate to **Integration Points** in your workspace.
2. On the Integration Points tab, click **New Integration Point**.
3. Set up the new integration point parameters.
4. Connect to the data source by setting up the connection parameters.
5. Map the import fields.
6. Click **Save**.

Once you save the integration point, you can run the import job. For more information, see Manually running the import job on page 46.

4.2.1 Import sources

With Integration Points, you can import data from the following sources:

- FTP, .csv file
- LDAP
- Document load file

- Image load file
- Production load file
- Microsoft Entra ID

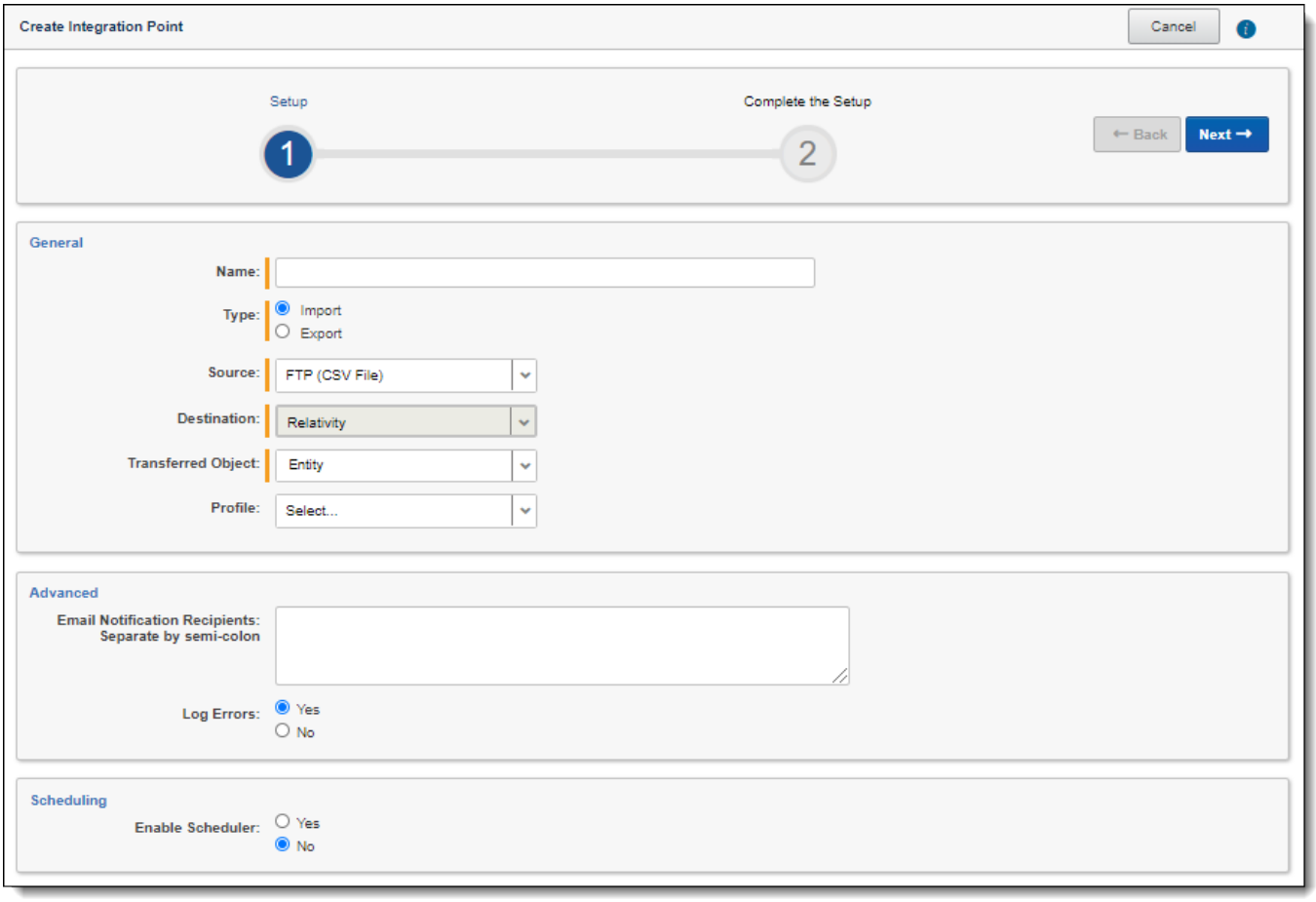
4.3 Importing a .csv file

Note: Opening a new port for your RelativityOne instance will require a Security assessment.

4.3.1 Setup

To create an integration point for importing an FTP (CSV file), begin by configuring the Setup parameters.

1. Complete the fields in the **Setup** layout:



General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.

- **Source**—select **FTP (CSV File)** to sync to a custodian list on an FTP Server to automatically update custodian information in your workspace. We strongly recommend using a secured FTP server and not using anonymous authentication.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you have already designated that you want to import into a Relativity workspace. You will select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. If you are importing the entity object, select **Entity** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information, see the Integration Points guide.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
    - If you select **Yes**, each job also logs any item level errors.
    - If you select **No**, Relativity doesn't log these item level errors.
    - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available**:**
    - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
        - **Daily**—select this option to sync once every day.
        - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
            - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
            - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
        - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
            - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
            - **Send On**—select the **Day # of the month** that you want this integration point to sync.
    - **Start Date**—the date that you want Integration Points to start syncing the data.
    - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
    - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not

to the server.

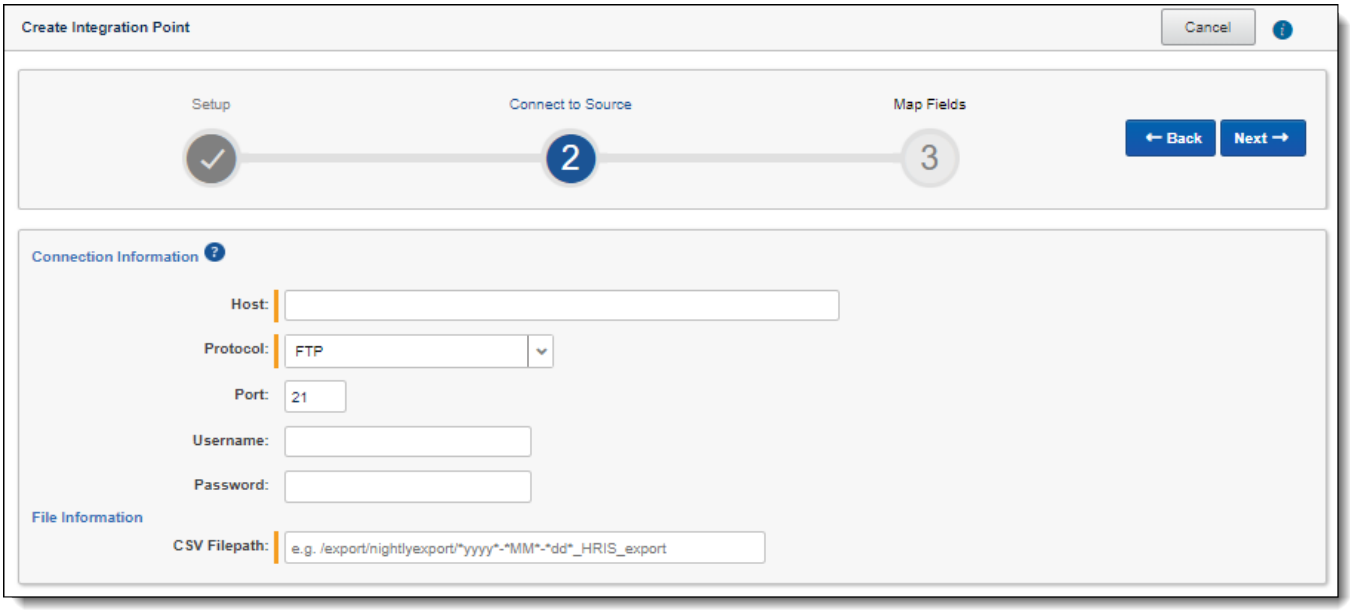
- **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

4.3.2 Connect to source

Continue to create your import integration point by connecting Relativity to the data source by following the steps below.

1. In the **Connect to Source** layout, complete the following fields:



Connection Information:

- **Host**—the FTP (File Transfer Protocol) or SFTP (SSH File Transfer Protocol) server address. For example, *filetransfer.example.com*. If Relativity cannot locate this address, you will receive an error stating that the remote could not be resolved, and you will not be able to proceed.
- **Protocol**—select the FTP or SFTP protocol.
- **Port**—the server port to which you want to connect. The FTP protocol default Port number is 21. The SFTP protocol default Port number is 22. The standard network ports 21 or 22 should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Some firewall solutions may impact the connectivity between RelativityOne and the FTP server.

  Note: If you need to open any port, please contact Relativity Support and allow at least three days to respond. Opening a new port for your RelativityOne instance requires a Security assessment. To successfully import an FTP (CSV file), the standard network ports should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Note that the firewall solutions may impact the connectivity between RelativityOne and the FTP server.

- **Username**—(Optional) the username to use for authentication. If left blank, Integration Points will use "anonymous."

- **Password**—(Optional) the associated password to use for authentication. If left blank, Integration Points will use "anonymous."

File Information:

- **CSV Filepath**—the location of the .csv file that Integration Points imports from the FTP/SFTP server. If you set the generated .csv file to always include the date, you can specify this file path value to use date wildcards so that Integration Points always imports the latest file. For example, the following file path will import the most recently dated file:
  */export/nightlyexport/*yyyy*-*MM*-*dd*_HRIS_export.csv*
  - Wildcards are case sensitive.
  - The wildcard feature only pulls data from a file name with the current date.
  - You can also use hh:MM:ss for hours, minutes, and seconds, with capital M's for minutes. When using times, only file names within the last hour are found.

2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

4.3.3 Map fields

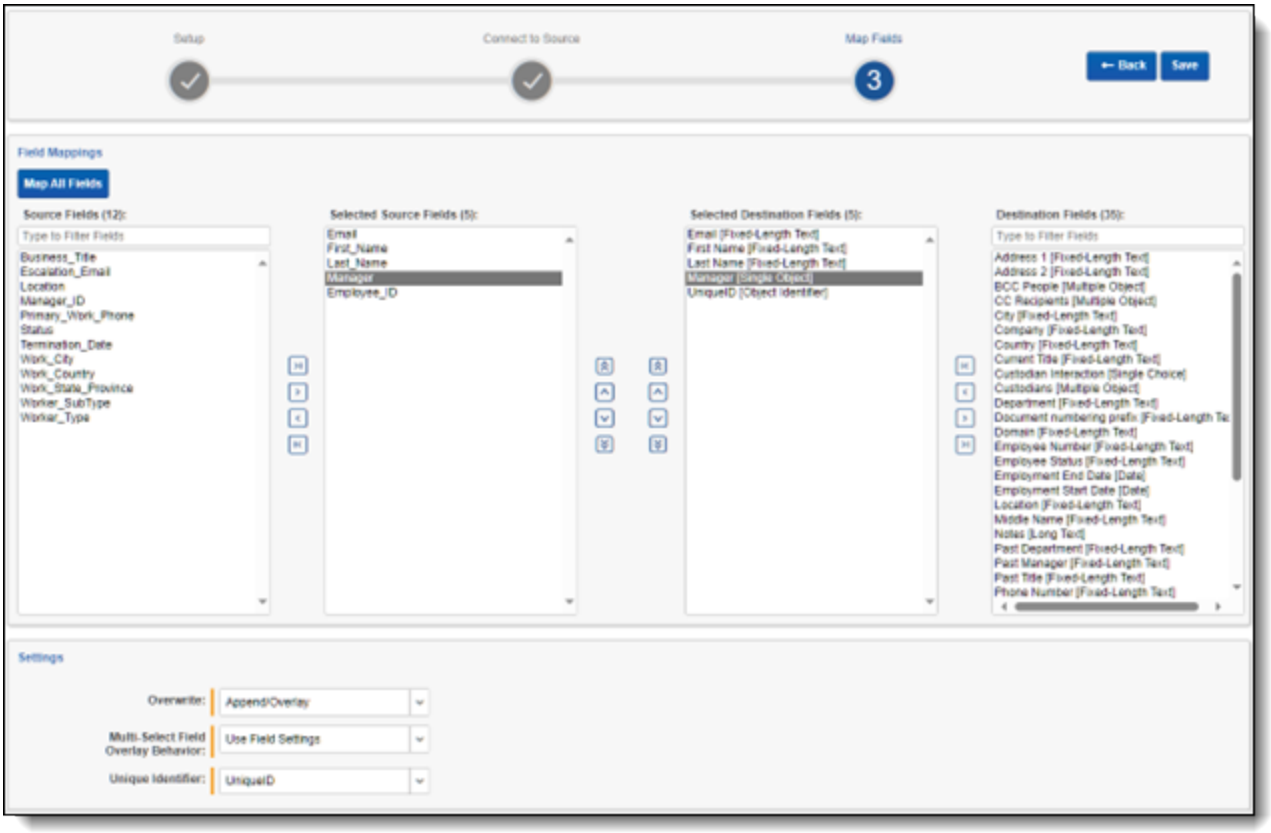
Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
   - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single and multiple object fields.
   - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
   - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
   - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
   - The field names in the Destination columns include the type of each field listed.

     When mapping fields, here are some issues to note:

   - If the WebAPIPath instance setting in kCura.IntegrationPoints is not configured correctly after upgrade or installation, the Source Fields list will be empty because it cannot return any attributes. As a result, you cannot map fields.
   - When importing the Entity object:
   - You need to map the First Name and Last Name fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value, which is then written to the Entity object.
   - You can link the imported entity to a manager if the manager also exists in the entity database. To proceed with linking them, you must map the Manager field on the Field Mappings page. Previously this was done via the Entity Manager Contains Link option, which has been deprecated.

- We recommend setting the Unique Identifier field to UniqueID.



2. Complete the following import Settings on the **Map Fields** layout:
   - **Overwrite**— determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
     - **Append Only**—promote only new records into the review workspace.
     - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
     - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below.
   - **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
     - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
     - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.

- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only.
  - Enter a unique value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute.
  - If the value is not unique in the workspace, it may lead to unintentional overwriting of existing data.

  Note: We recommend setting the Unique Identifier field to UniqueID. Using a name field can cause an error because there is the possibility of having two custodians with the same name.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see the Integration Points guide.

4.4 Importing LDAP

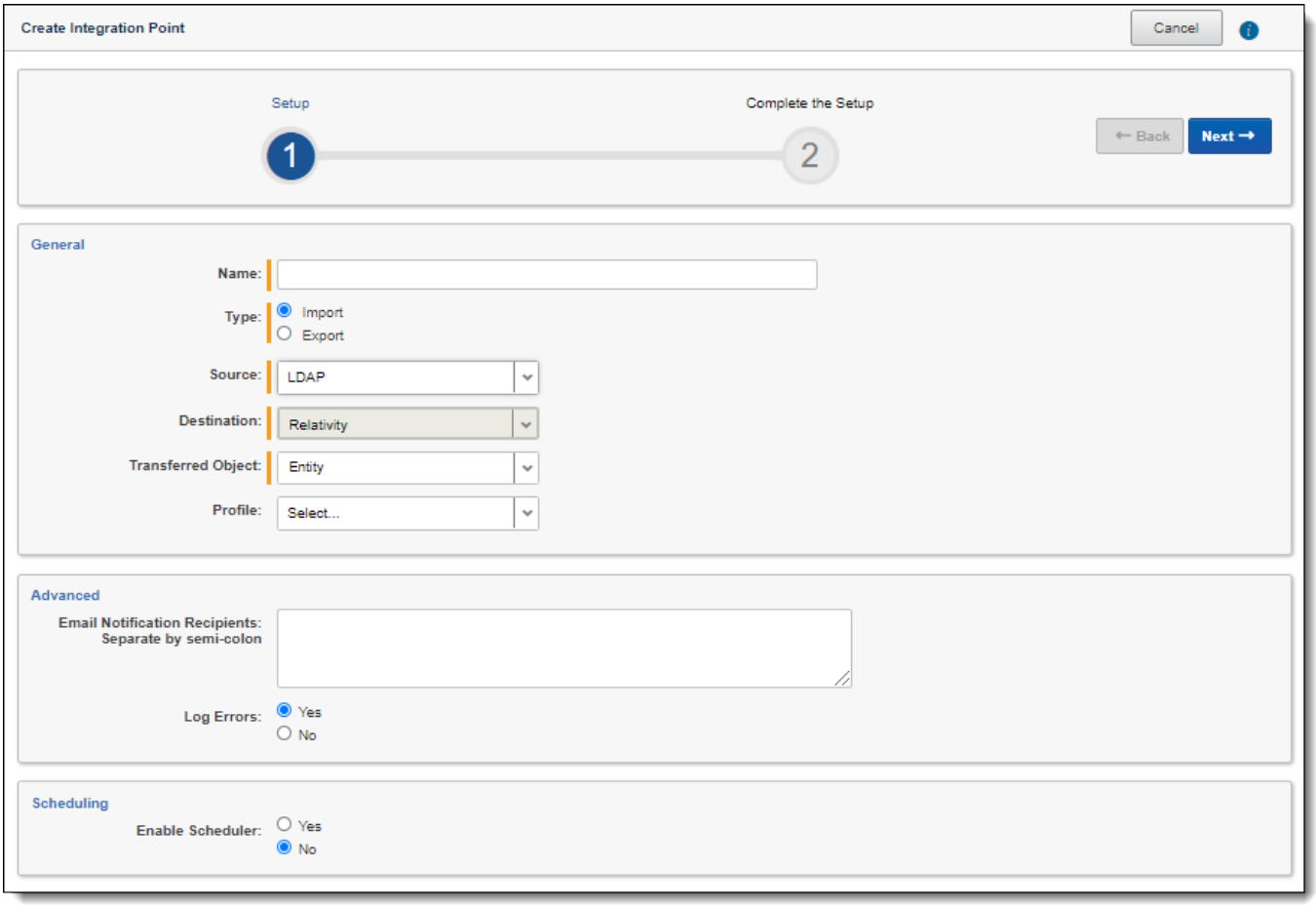
Before importing LDAP (Lightweight Directory Access Protocol), the Integration Points LDAP Provider needs to be connected to the LDAP server. To connect successfully, open the standard network ports for both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). To connect these ports, contact Relativity Support.

Note: To successfully connect Integration Points LDAP Provider to the LDAP server, the standard network ports should be open on both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). LDAP connection requires using 636 (Secure Socket Layer) network ports. Custom ports are not supported and may not work correctly. Please be aware that firewall solutions may impact the connectivity between RelativityOne and LDAP server.

4.4.1 Setup

To create an integration point for importing LDAP:

1. In the **Setup** layout, complete the following fields:



General:

- **Name**—the name of your integration for reference purposes.
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **LDAP** here, since you want to import data from a Lightweight Directory Access Protocol source. For example, use this source provider to import an organization's people directory.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. It is typical to use the LDAP source to sync the Entity object.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information on profiles, see the Integration Points guide.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
    - If you select **Yes**, each job also logs any item level errors.
    - If you select **No**, Relativity doesn't log these item level errors.
    - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

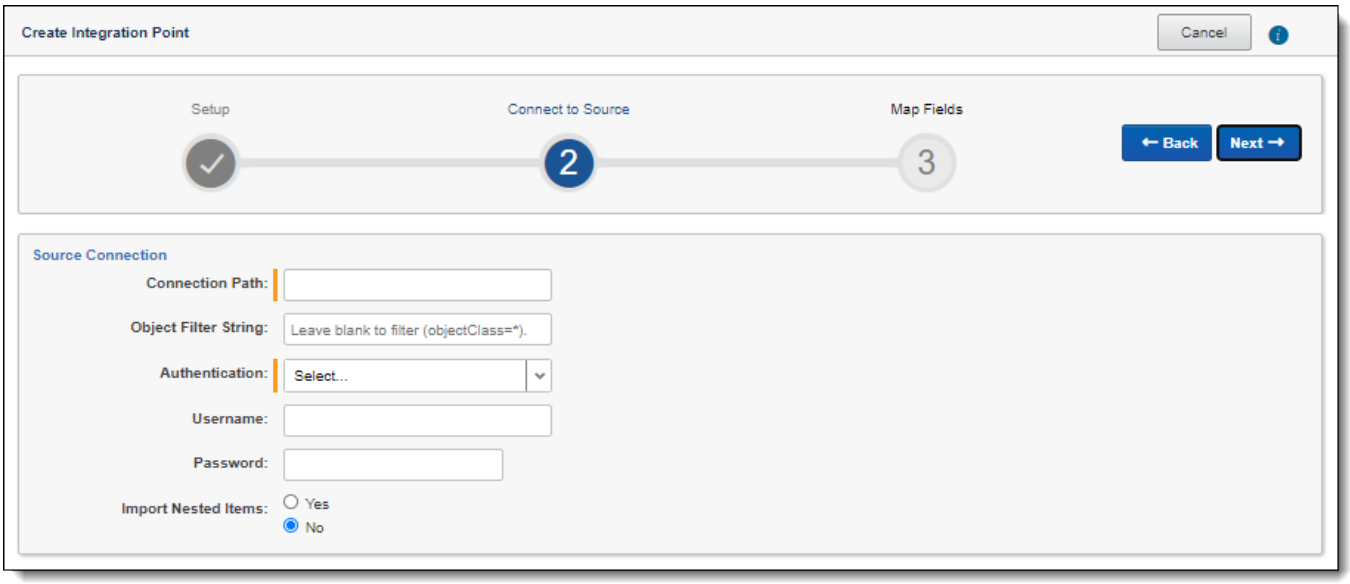
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available**:**
    - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
        - **Daily**—select this option to sync once every day.
        - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
            - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
            - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
        - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
            - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
            - **Send On**—select the **Day # of the month** that you want this integration point to sync.
    - **Start Date**—the date that you want Integration Points to start syncing the data.
    - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
    - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
    - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

4.4.2 Connect to source

Continue create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields:



   - **Connection Path**—the URL used to locate the directory. For example, "Relativity.com." You will need to add **636** to the URL to access that port. Also, note that you can optionally include specific organizational unit references by adding a forward slash (/) after the server. The following example looks up items in the Relativity.com domain within the Employees organizational unit:ldap.*Relativity.com:636/OU-U=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=corp*

     Note: Contact Relativity Support to open port 636.

   - **Object Filter String**—this string specifies certain attributes that the requested LDAP entries must contain that Integration Points considers for import. For example, if you want to import users, you would use an object filter string such as *(objectClass=user)*. For more information on search filter syntax, refer to this Microsoft article: Search Filter Syntax.
   - **Authentication**—Secure Socket Layer is the only applicable authentication type for port 636.
   - **Username**—if required by the server's authentication, enter a username to connect to the server (connection path). For external SaaS LDAP instances, the username may need to include user ID (UID), organization unit (ou), organization's distinguished name (o) and the connection path: *uid=johndoe,ou=Users,o=6065d44947314c4eb10ca904,dc=somesaasldap,dc=com*
   - **Password**—if required by the server's authentication, you can enter a password to connect to the server (connection path).
   - **Import Nested Items**—select **Yes** for the import to include all sub directories in the specified connection path. Select **No** for the import to include only the first level items brought back in the connection path.

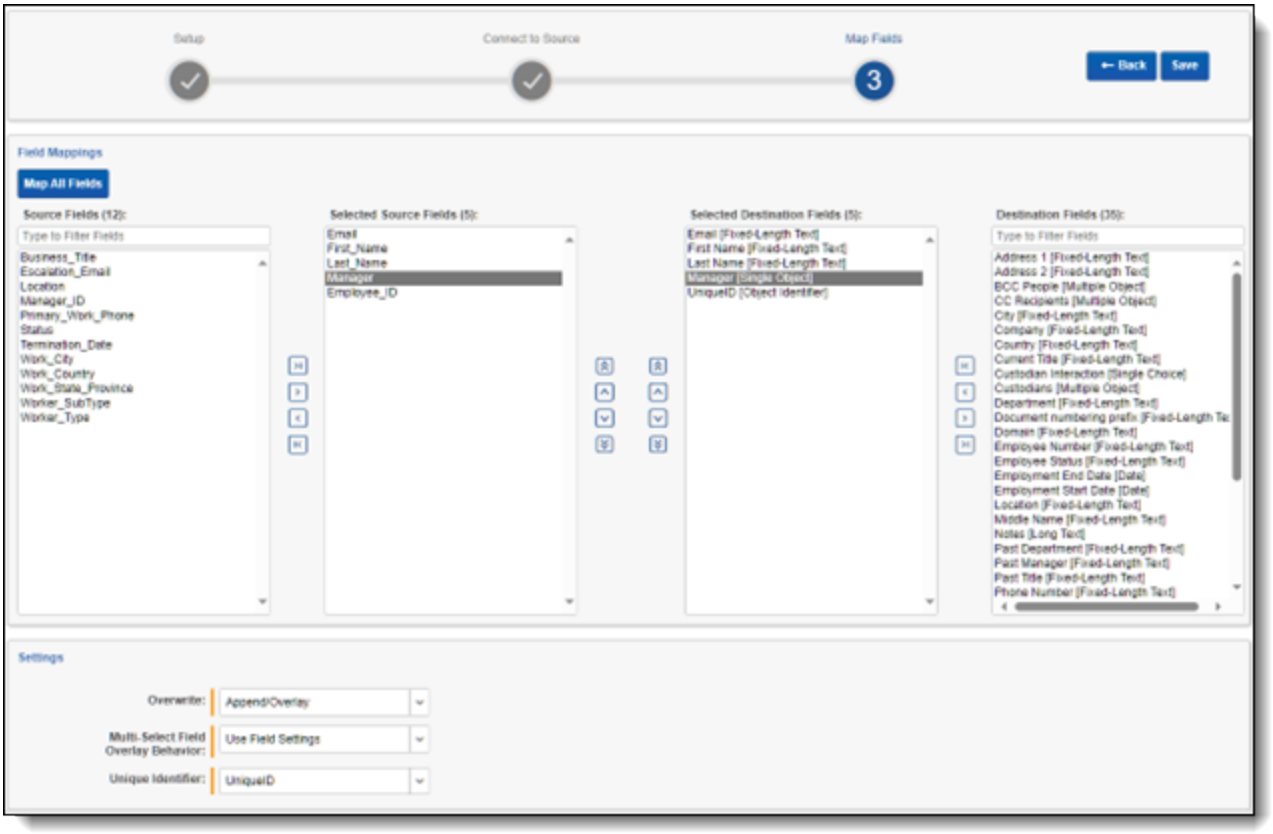
2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

4.4.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
    - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
    - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
    - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
    - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
    - The field names in the Destination columns include the type of each field listed.

    When mapping fields, here are some issues to note:
    - If the WebAPIPath instance setting in kCura.IntegrationPoints is not configured correctly after upgrade or installation, the Source Fields list will be empty because it cannot return any attributes. As a result, you cannot map fields.
    - When importing the Entity object:
        - You need to map the First Name and Last Name fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value, which is then written to the Entity object.
        - You can link the imported entity to a manager if the manager also exists in the entity database. To proceed with linking them, you must map the Manager field on the Field Mappings page. Previously this was done via the Entity Manager Contains Link option, which has been deprecated.



2. Complete the following import Settings on the **Map Fields** layout:
    - **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
        - **Append Only**—promote only new records into the review workspace.
        - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
        - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.
    - **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
        - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
        - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.

- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.

- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a unique value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. If the value is not unique in the workspace, it may lead to unintentional overwriting of existing data.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see the Integration Points guide.

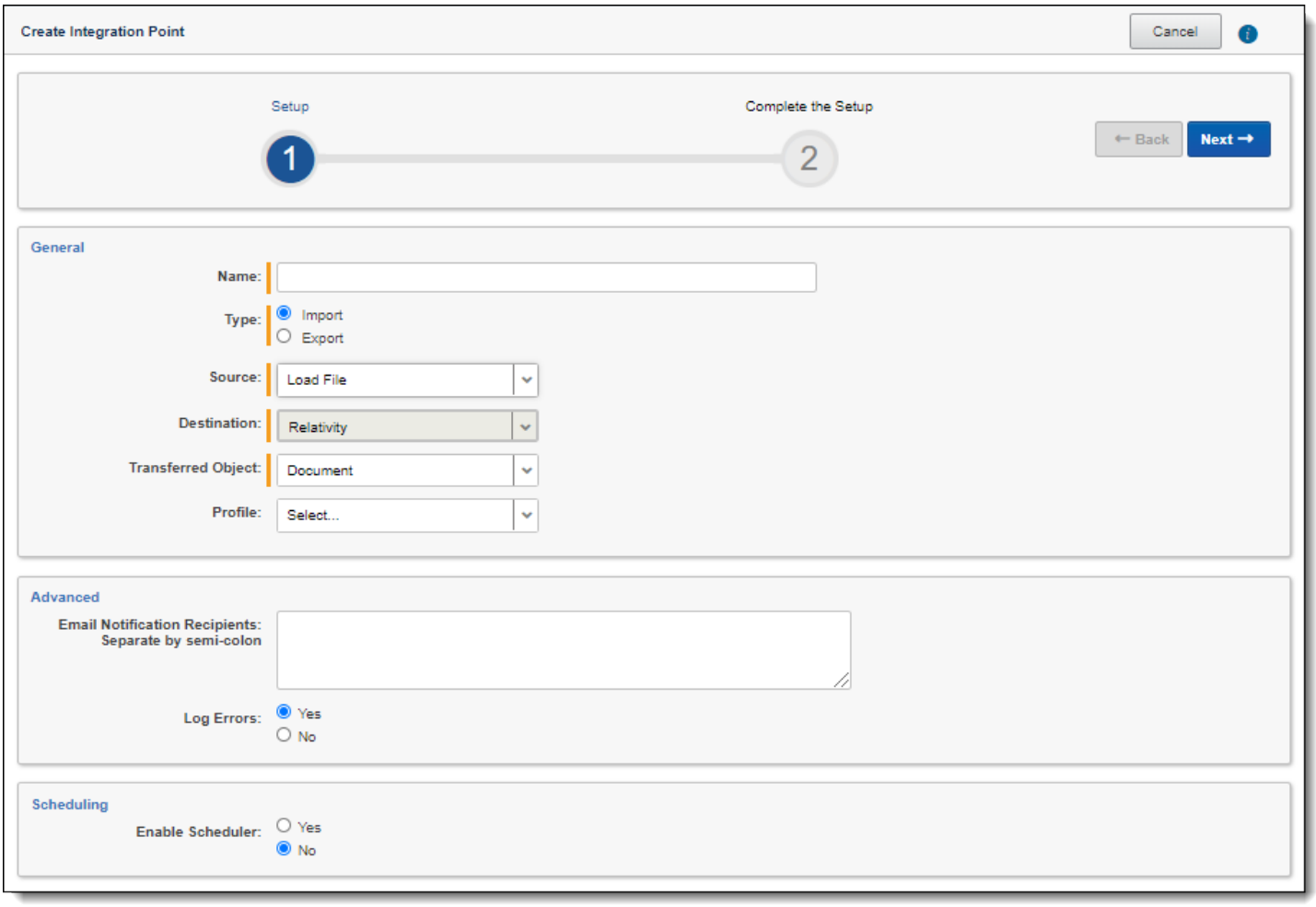
4.5 Importing a document load file

Note: Before creating an integration point to import a load file, you must first place the load data in the \\Fileshare\StructuredData folder. Otherwise, you will not be able to select that data for the Import Source field.

4.5.1 Setup

To create an integration point for importing a document load file, follow the steps below.

1. In the **Setup** layout, complete the following fields:



General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether your importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

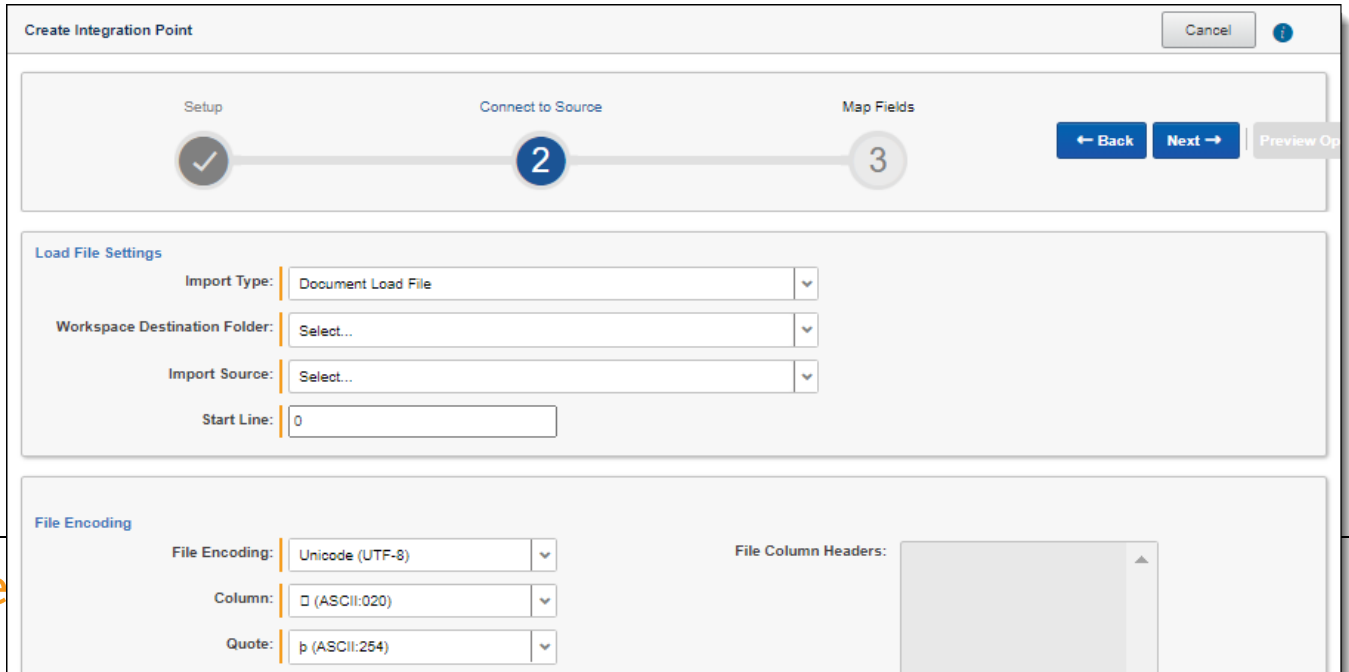
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available**:**
  - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

4.5.2 Connect to source

Continue to create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields.



Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Document Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you are importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
  - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
  - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: \\Fileshare\StructuredData. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

File Encoding:

The following fields are only available if you selected Document Load File for the Import Type field above.

- **File Encoding**—select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Note the following details about encoding:
  - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
  - Relativity provides you with the ability to audit the encoding of a load file.
- **Column**—select the character used to separate columns.
- **Quote**—select the character used as the text qualifier.
- **Newline**—select the character used to indicate the end of a line in any extracted text or long text field.
- **Multi-Value**—select the character used to separate choices within a field.
- **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy. For example, you might import a field with following values: “Hot\Really Hot\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity displays the choices
- **File Column Headers**—displays the load file's column headers. Relativity automatically updates this section of the Load File tab when you select the file encoding. Note the following details about file column headers:
  - After you select an encoding, this section displays the fields in the load file. The column headers in the file display as vertical list. The fields display in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file.

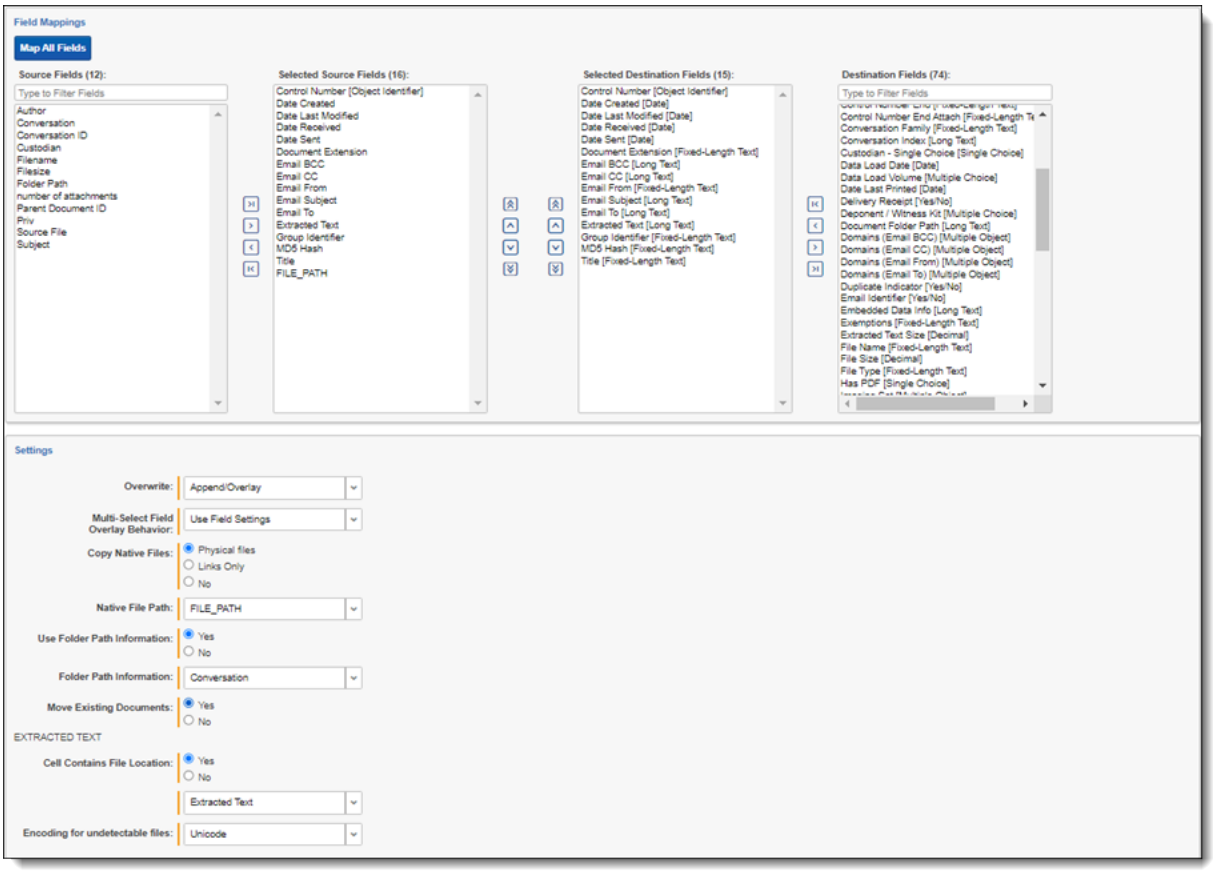
2. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

4.5.3 Map fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
   - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
   - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
   - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
   - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
   - The field names in the Destination columns include the type of each field listed.

   When mapping fields, here are some issues to note:
   - If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any attributes, and you are not able to map fields.
   - When the load file data is being imported to Entity RDO, then **Full Name**, **First Name** and **Last Name** fields in the destination workspace must be mapped.



2. Complete the following import Settings on the **Map Fields** layout:
   - **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:

    - **Append Only**—promote only new records into the review workspace.
    - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
    - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are able to create folders or re-folder documents when you select Append/Overlay.

- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
    - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Native Files**—this Yes/No field is only visible when you select the Documents RDO, and lets you indicate whether Integration Points should import any native files in the sync.
    - **Native File Path**—this field appears if you select Yes to import the native files. From the drop-down menu, select the source provider attribute containing the file path links to the natives that you want to import.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
    - Select **Yes** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting Yes makes the Folder Path Information field required below.
    - Select **No** if you do not want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
    - You have the option of creating folders or re-foldering documents when you select Append/Overlay for the Overwrite field.
    - You have the option of re-foldering documents for the Overwrite field through the Move Existing Documents field below.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace. For the purposes of ECA and Investigation, select the **Processing Folder Path** option.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.

- Select **Yes** to move existing documents into the folders provided in the previous **Folder Path Information** field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, so you would select Yes.
- Select **No** if you do not want to re-folder existing documents.

- **Extracted Text**—select the destination field that is mapped to a path to Extracted Text files. The content of these files will be read into the selected field. Note that only Long Text destination fields that are mapped will show up as options in the Extracted Text drop-down. You can select an encoding type for the extracted text files as well.
- **Cell contains file location**—select this option if your extracted text is in document-level text files, and your load file contains a path to those text files.
- **Encoding for undetectable files**—select an encoding for the text file.
- **Entity Manager Contains Link**—this Yes/No field is visible for all import sources when the Entity RDO is selected as the destination of the imported data. Some import sources populate the manager field with a link to the manager's profile on their internal system. Set this field to **No** if the Document Load File source is selected.

3. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see Manually running the import job on page 46.

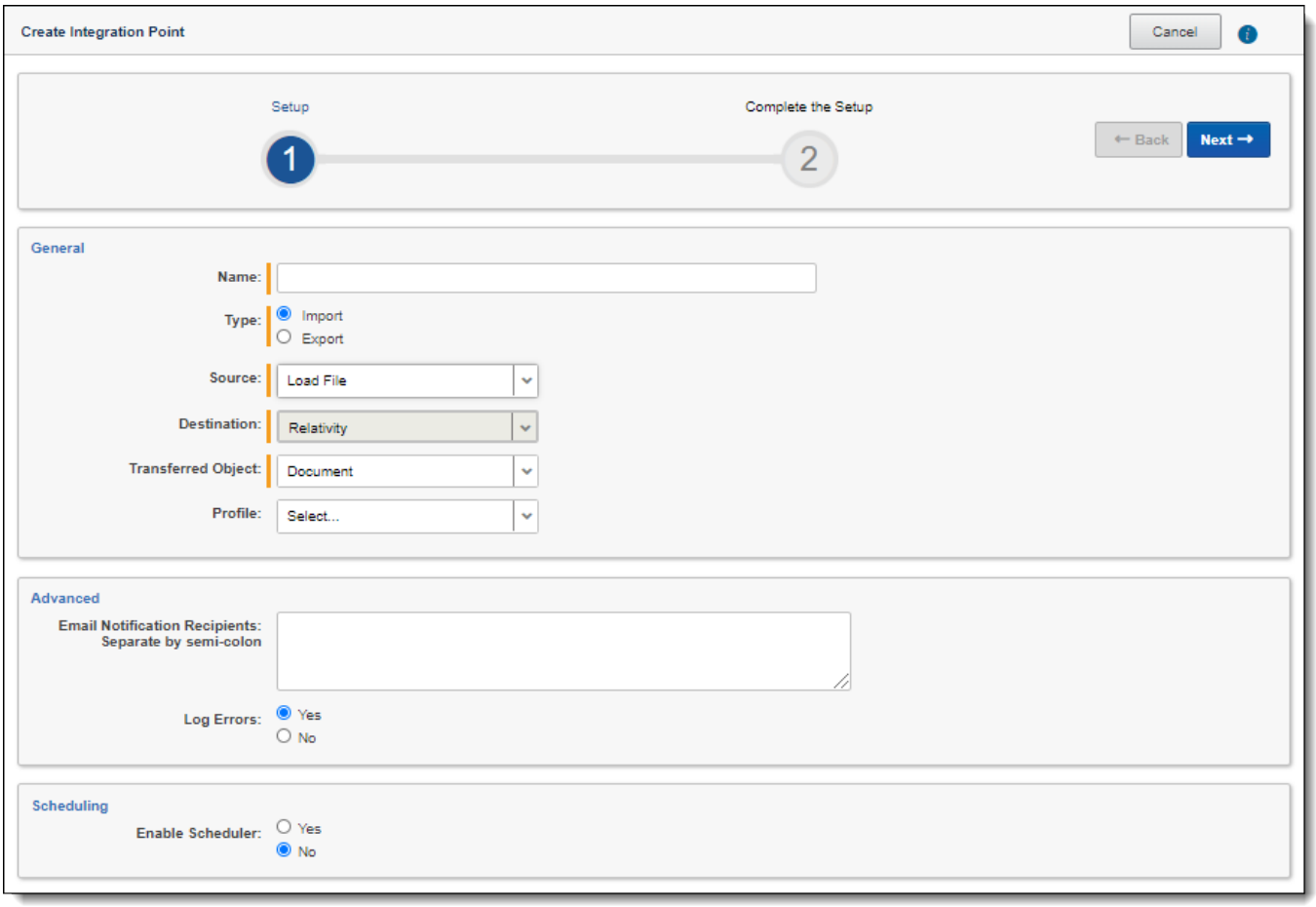
4.6 Importing an image load file

Note: Before creating an integration point to import a load file, you must first place the load data in the \\Fileshare\StructuredData folder. Otherwise, you will not be able to select that data for the Import Source field.

4.6.1 Setup

To create an integration point for importing an image load file, perform the following steps:

1. In the **Setup** layout, complete the following fields:



General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether your importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
    - If you select **Yes**, each job also logs any item level errors.
    - If you select **No**, Relativity doesn't log these item level errors.
    - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

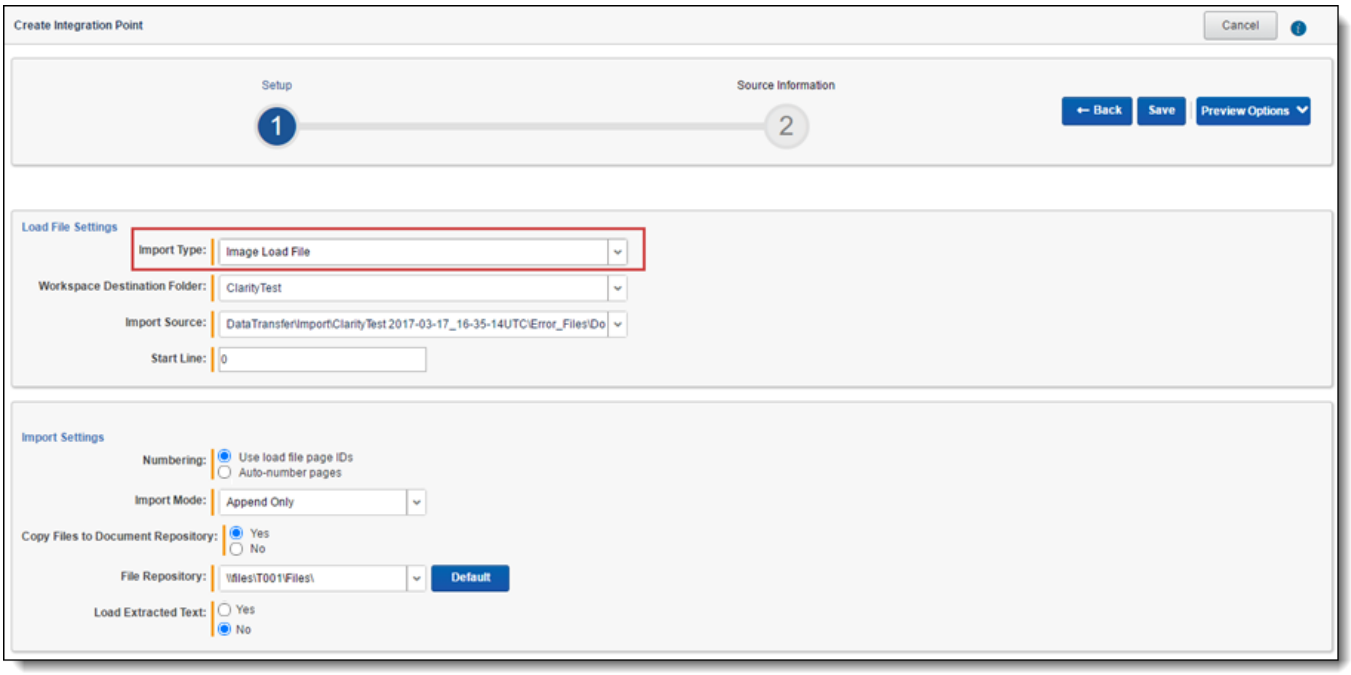
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available**:**
    - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
        - **Daily**—select this option to sync once every day.
        - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
            - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
            - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
        - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
            - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
            - **Send On**—select the **Day # of the month** that you want this integration point to sync.
    - **Start Date**—the date that you want Integration Points to start syncing the data.
    - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
    - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
    - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Source Information layout.

4.6.2 Source information

Continue create your import integration point by connecting adding the source information. Follow the steps below.

1. In the **Source Information** layout, complete the following fields.



Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Image Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you're importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
    - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
    - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: \\Fileshare\StructuredData. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

Import Settings:

The following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the images you're importing.
    - **Use load file page IDs**—select this to use the default setting to number the images, which is the control number.
    - **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record.

The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page. Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.

- **Import Mode**
  - **Append Only**—select this to load only new records. Select this option to import the extracted text and natives from a .dat file.
  - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below This field acts as a link indicating to Relativity where to import the data. Select this option when overlaying production images onto the existing documents.
  - **Append/Overlay**—select this to add new records and overlay data on existing records.
- **Overlay Identifier**—select a field that stores overlaid document-level Bates information on the document. This is only available if you selected Overlay Only for the import mode.
  The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.
- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
  - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
  - **No**—select this if the native files already reside in their final location, which is accessible by Relativity. This option is not available for selection in RelativityOne because all files must be copied to a selected File Repository.
- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Load Extracted Text** - determines whether or not Relativity will load new text for Production documents that may be revised based on redactions.
  - The text files must have .txt extensions, be stored in the same directory as the TIFF files, and be named in the same as the TIFF files.
  - This field is only available for image load files.
  - When you select this, the required Encoding for undetectable files field appears below.
- **Encoding for undetectable files**—select an encoding for the new text file that Relativity loads, per your enabling of the Load Extracted Text field above.

2. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see Manually running the import job on page 46.

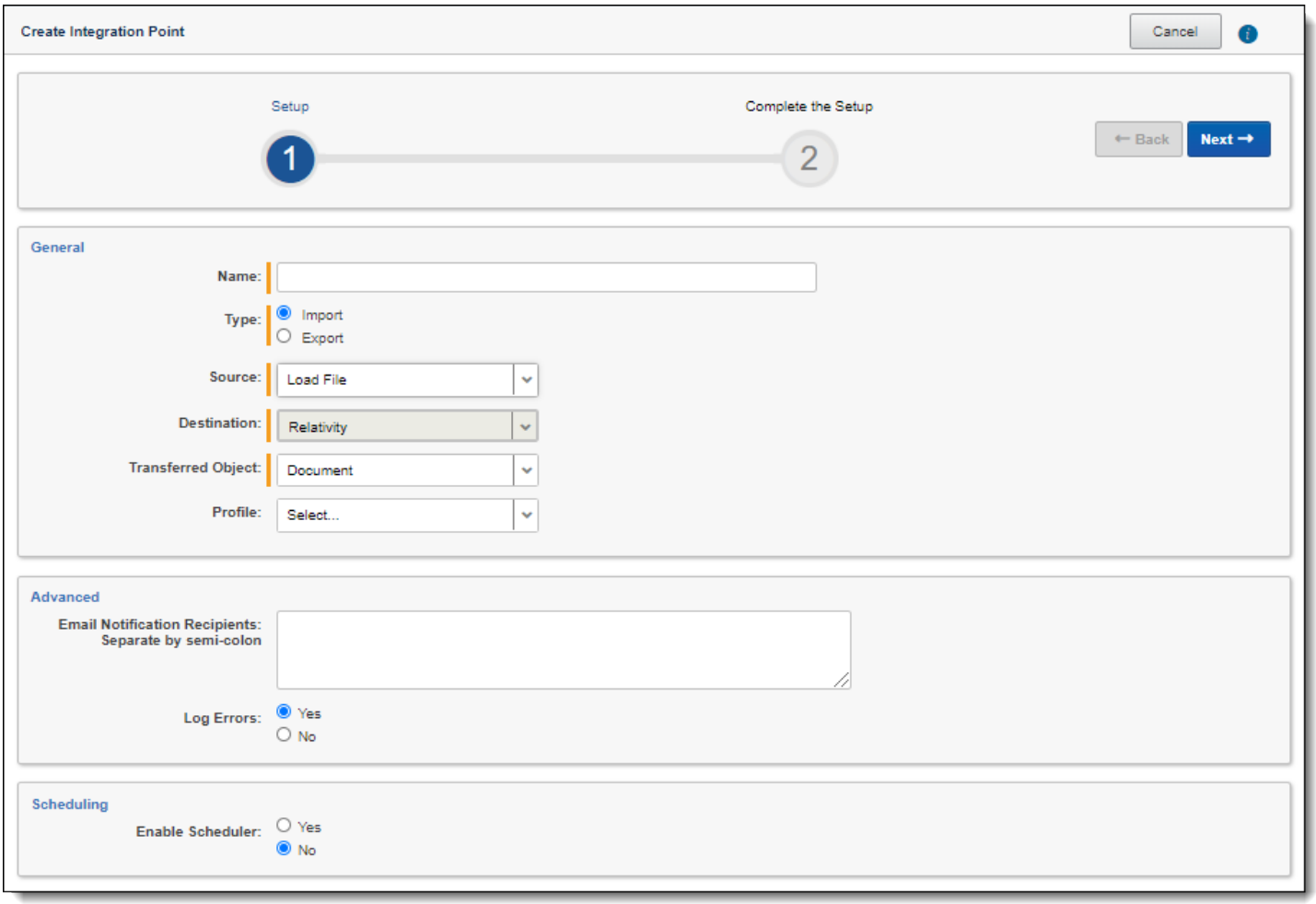
4.7 Importing a production load file

Note: Before creating an integration point to import a load file, you must first place the load data in the \\Fileshare\StructuredData folder. Otherwise, you will not be able to select that data for the Import Source field.

4.7.1 Setup

To create an integration point specifically for importing a production load file, follow the steps below.

1. In the **Setup** layout, complete the following fields:



General:

- **Name**—the name of your integration for reference purposes
- **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
- **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether your importing a document, image, or production load file.
- **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.

- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.

Advanced:

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity doesn't log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.

Scheduling:

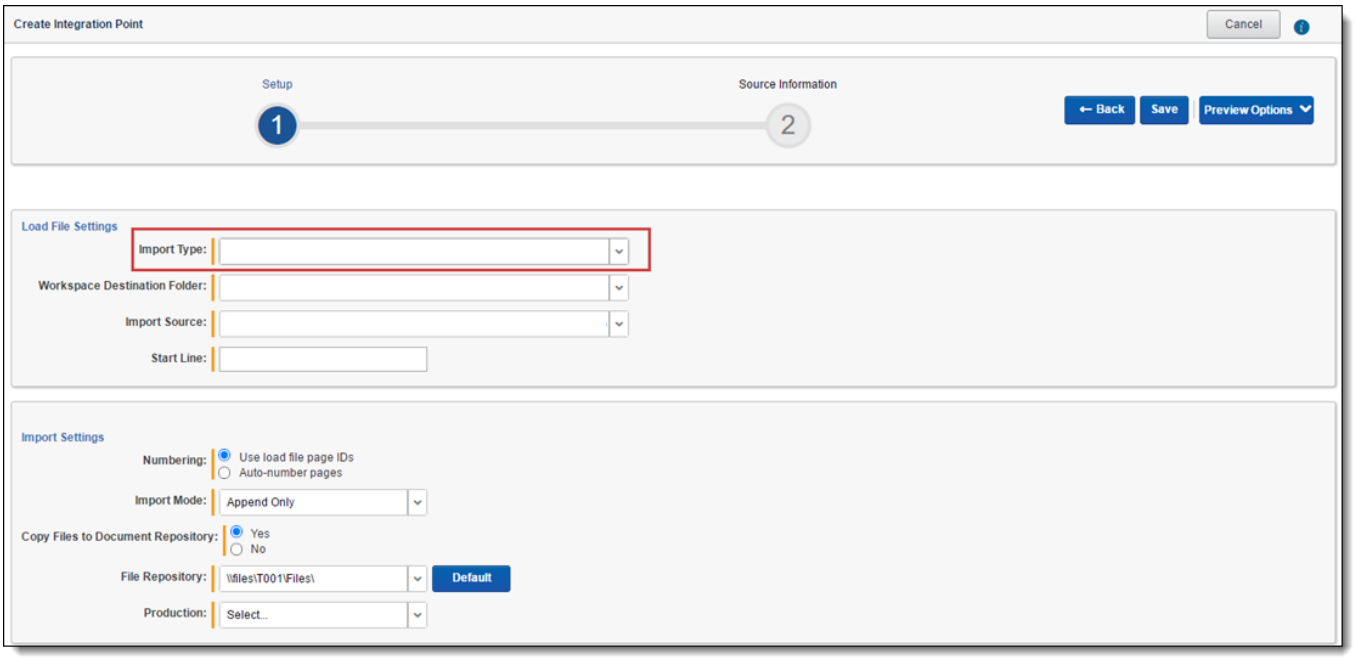
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available**:**
  - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
    - **Daily**—select this option to sync once every day.
    - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.
      - **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.
    - **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
      - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
      - **Send On**—select the **Day # of the month** that you want this integration point to sync.
  - **Start Date**—the date that you want Integration Points to start syncing the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
  - **Time Zone**—select the appropriate time zone.

2. Click **Next** to advance to the Connect to Source layout.

4.7.2 Source information

Continue create your import integration point by connecting adding the source information. Follow the steps below.

1. In the **Source Information** layout complete the following fields.



Load File Settings:

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Production Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you are importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
    - These locations are hard-coded into Relativity and cannot be changed. You cannot load or export data to a different location than is listed here.
    - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: \\Fileshare\StructuredData. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

Import Settings:

The following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the production you're importing.
    - **Use load file page IDs**—select this to use the default setting to number the production, which is the control number.
    - **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option

appends the 01, .02, and so on to the page-level identifier, creating a unique number per page. Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.

- **Import Mode**
  - **Append Only**—select this to load only new records. Select this option to import the extracted text and natives from a .dat file.
  - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below This field acts as a link indicating to Relativity where to import the data. Select this option when overlaying production images onto the existing documents.
  - **Append/Overlay**—select this to add new records and overlay data on existing records.
- **Overlay Identifier**—if you selected Overlay Only for the import mode, select a field that stores overlaid document-level Bates information on the document.
  The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.
- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
  - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
  - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.
- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Production**—select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.

2. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see Manually running the import job on page 46.

4.8 Importing from Microsoft Entra ID

Note: Microsoft has renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to Microsoft documentation for more information.

The Integration Points Microsoft Entra ID Provider is a separate and standalone application that is not in the Relativity Application Library. For assistance in getting the Microsoft Entra ID Provider installed into your workspace, contact Relativity Support. For more information, see the Integration Points guide.

You will need the following to complete the setup in Integration Points:

- Application ID from Microsoft Azure
- Application Secret Value from Microsoft Azure
- Domain address of Microsoft Azure instance

- Any filtering requirements that will be used to filter imported data
- Field Mappings to map fields between Relativity and Microsoft Entra ID.

4.8.1 Setup

To create an integration point for importing from Microsoft Entra ID:

1. Complete the following fields in the Setup layout:
   General:
   - **Name**—the name of your integration for reference purposes.

     Note: Name the application in Integration Points the same as you did in Microsoft Entra ID for easy location of application when needing to make updates.

   - **Type**—select Import to designate the job as a data import. Selecting Import makes all the possible import sources available for selection in the Source field below.
   - **Source**—all possible third-party systems that you can import data from. Select **Microsoft Entra ID** (formerly known as Azure AD).
   - **Destination**—by default, this is set to Relativity and is not editable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
   - **Transferred Object**—the Relativity Dynamic Object (RDO) to which you want to import the data. Select the Entity object.
   - **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list.

   Advanced:
   - **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
   - **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
     - If you select **Yes**, each job also logs any item level errors.
     - If you select **No**, Relativity doesn't log these item level errors.
     - Regardless of your selection, job-level errors are always recorded in Relativity.

   Scheduling:
   - **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available**:**
     - **Frequency**—the interval at which Relativity syncs this integration point. Select one of the options below:
       - **Daily**—select this option to sync once every day.
       - **Weekly**—select this option to sync on a weekly basis. Then, enter data in the following fields:
         - **Reoccur**—enter a numeric value in the **Every # week(s)** field for how often you want it to occur weekly.

- **Send On**—specify on which day of the week (Monday through Sunday) the sync will take place by selecting any of the days of the week listed.

- **Monthly**—select this option to sync on a monthly basis. Then, enter data in the following fields:
  - **Reoccur**—enter a numeric value in the **Every # month(s)** field for how often you want it to occur monthly.
  - **Send On**—select the **Day # of the month** that you want this integration point to sync.

- **Start Date**—the date that you want Integration Points to start syncing the data.
- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.
- **Time Zone**—select the appropriate time zone.

2. Click **Next** to continue to the Connect to Source layout.

4.8.2 Connect to source

Continue to create your import integration point by connecting Relativity to your Microsoft Entra ID data source. You can select to import from your commercial or government Microsoft Entra ID profile. Follow the steps below.

1. Complete the following fields in the Connect to Source layout:
   - **Version**—select either a Commercial or Government Microsoft Entra ID version to import from.
   - **Application ID**—the ID of the application was created in the Azure Portal. For more information, see the Integration Points guide.
   - **Password**—the associated Application Secret Value, not the Secret ID, is the password for the application that was created in the Azure Portal. For more information, see the Integration Points guide.
   - **Directory ID**—the Microsoft Entra ID tenant domain the Azure application resides in.
   - **Filter By**—you can limit the records imported by limiting import to specific users or groups.
   - **Filter**—the filter condition used to identify Users or Groups that should be imported. Filters must be written using the Graph query syntax (for example, department eq 'Engineering'). For more information on using Graph query syntax, see Microsoft's Graph REST API documentation.

     Notes:
     - Microsoft supports two kinds of filtering for Microsoft Entra ID: *Filters* and *Advanced Filters*.
     - Currently, Relativity's Entra ID Provider only supports filters. It does not support advanced filters.
     - In Microsoft's documentation, on the Use the $filter query parameter page, you can find filters and advanced filters, with advanced filters marked with **.

   - **MS-Graph Version**—determines which version of the Graph API Integration Points will be used when interfacing with Azure AD. Defaults to version 1.0 of the Graph API if left blank. Another available option is Beta.

2. Click **Next** to continue to the Map Fields layout.

Note: A warning message appears at the top of page if information is not valid, and you will not be able to continue to the next step until the error is resolved.

4.8.3 Map fields

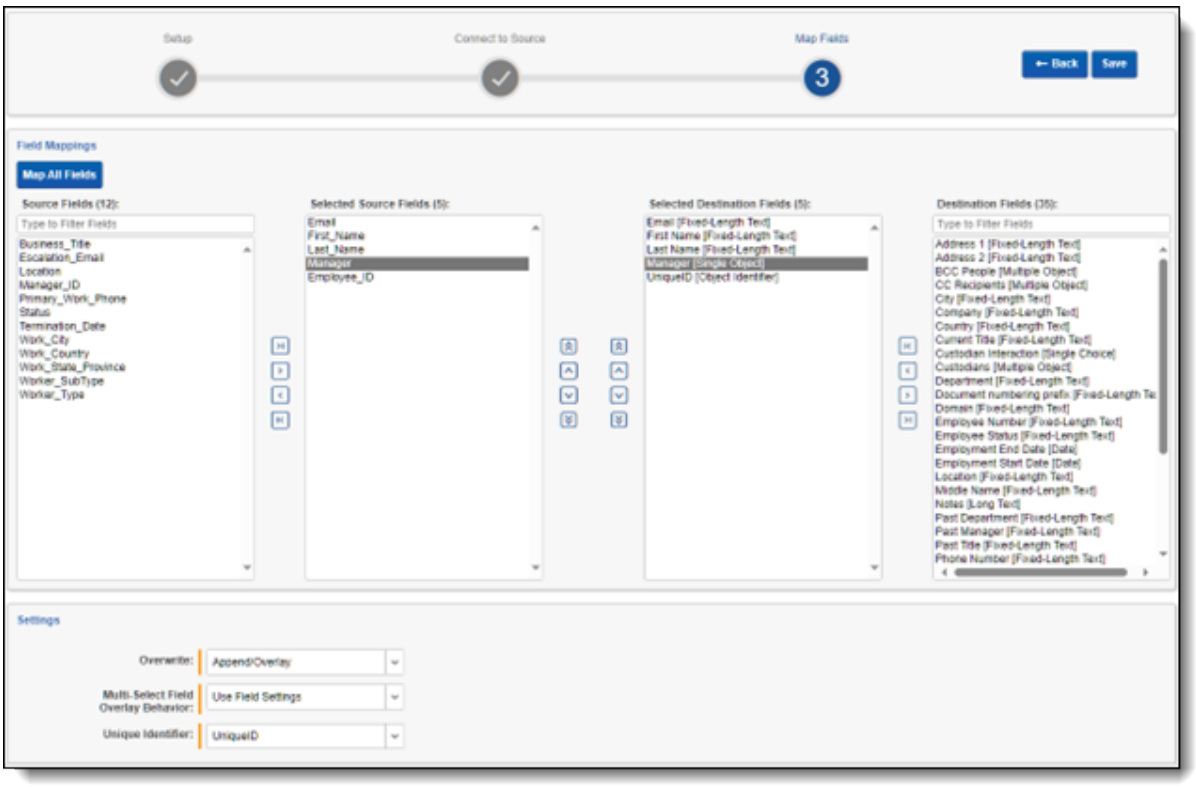
Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:
    - Click the **Map All Fields** button to automatically map all Source fields with matching Destination field names, except single/multiple object fields.
    - Use the Shift+click and Ctrl+click method to select multiple fields at a time.
    - Use the single and double arrow buttons or double-click a field to move the selected fields between columns.
    - If you have Destination Fields that are mapped to fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.
    - The field names in the Destination columns include the type of each field listed.

      When mapping fields, here are some issues to note:

    - If the WebAPIPath instance setting in kCura.IntegrationPoints is not configured correctly after upgrade or installation, the Source Fields list will be empty because it cannot return any attributes. As a result, you cannot map fields.
    - When importing the Entity object:
        - You need to map the First Name and Last Name fields. In case the Full Name field is not being mapped, those two fields are combined for the Full Name value, which is then written to the Entity object.
        - You can link the imported entity to a manager if the manager also exists in the entity database. To proceed with linking them, you must map the Manager field on the Field Mappings page. Pre-

viously this was done via the Entity Manager Contains Link option, which has been deprecated.



2. Complete the following import Settings on the **Map Fields** layout:
    - **Overwrite**— determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
        - **Append Only**—promote only new records into the review workspace.
        - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
        - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below.
    - **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you have selected either Overlay Only or Append/Overlay above. This field provides the following choices:
        - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace. These merge regardless of the overlay behavior settings in the environment.
        - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace. These merge regardless of the overlay behavior settings in the environment.
        - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.

- **Unique Identifier**—this option is only available when the Overwrite mode is set to Overlay Only. Enter a unique value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. If the value is not unique in the workspace, it may lead to unintentional overwriting of existing data.

3. Click **Save** to save the Integration Point.

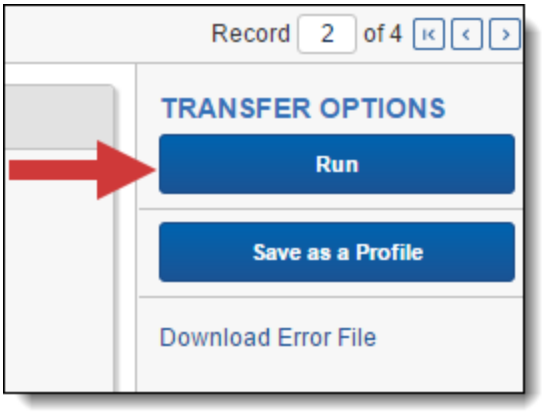
Once all of the settings have been entered the Integration Points job will run according to the schedule that was set. If you would like to run the job ahead of that time. For more information, see the Integration Points guide.

4.8.4 Reporting on Microsoft Entra ID imports

Reporting on Microsoft Entra ID imports can be done in Integration Points. For more information, see the Integration Points guide.

4.9 Manually running the import job

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



Click **OK** on the run confirmation message.

The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You will see any of the following status values:

- **Pending**—the job has yet to be picked up by an agent.
- **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
- **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
- **Processing**—the agent has picked up the job and is in the process of completing it.
- **Completed**—the job is complete, and no errors occurred.
- **Completed with errors**—the job is complete and errors have occurred.
- **Error - job failed**—a job-level error occurred and the job did not complete because it failed.

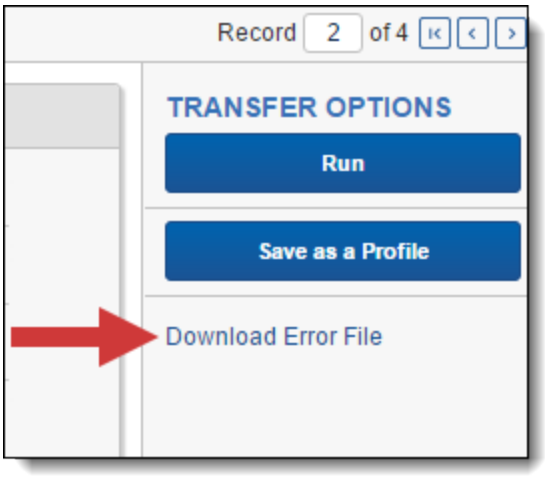
- **Stopping**—you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped**—the job has been stopped.

4.10 Downloading the error file

If your integration point encounters any errors during its run, the Download Error File link on the Transfer Options console is activated. This gives you the option of downloading an Excel (csv) file containing all the errors found in the integration point.

Note: This option is available for load file imports only and is not visible for other providers.

1. To download this file, click the **Download Error File** link in the Transfer Options console.

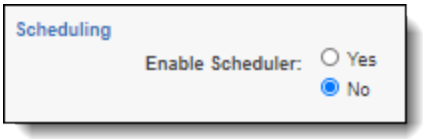


2. Open the downloaded Excel file to review the errors.
3. If desired, manually fix the errors. Once fixed, save the modified file and create a new integration point to import the fixed files, since they were not imported during the original transfer. Be sure that the Import Source field of the new integration point refers to the file you just added.

4.11 Disabling a scheduled Integration Point job

To disable a scheduled integration point , simply turn off the scheduler.

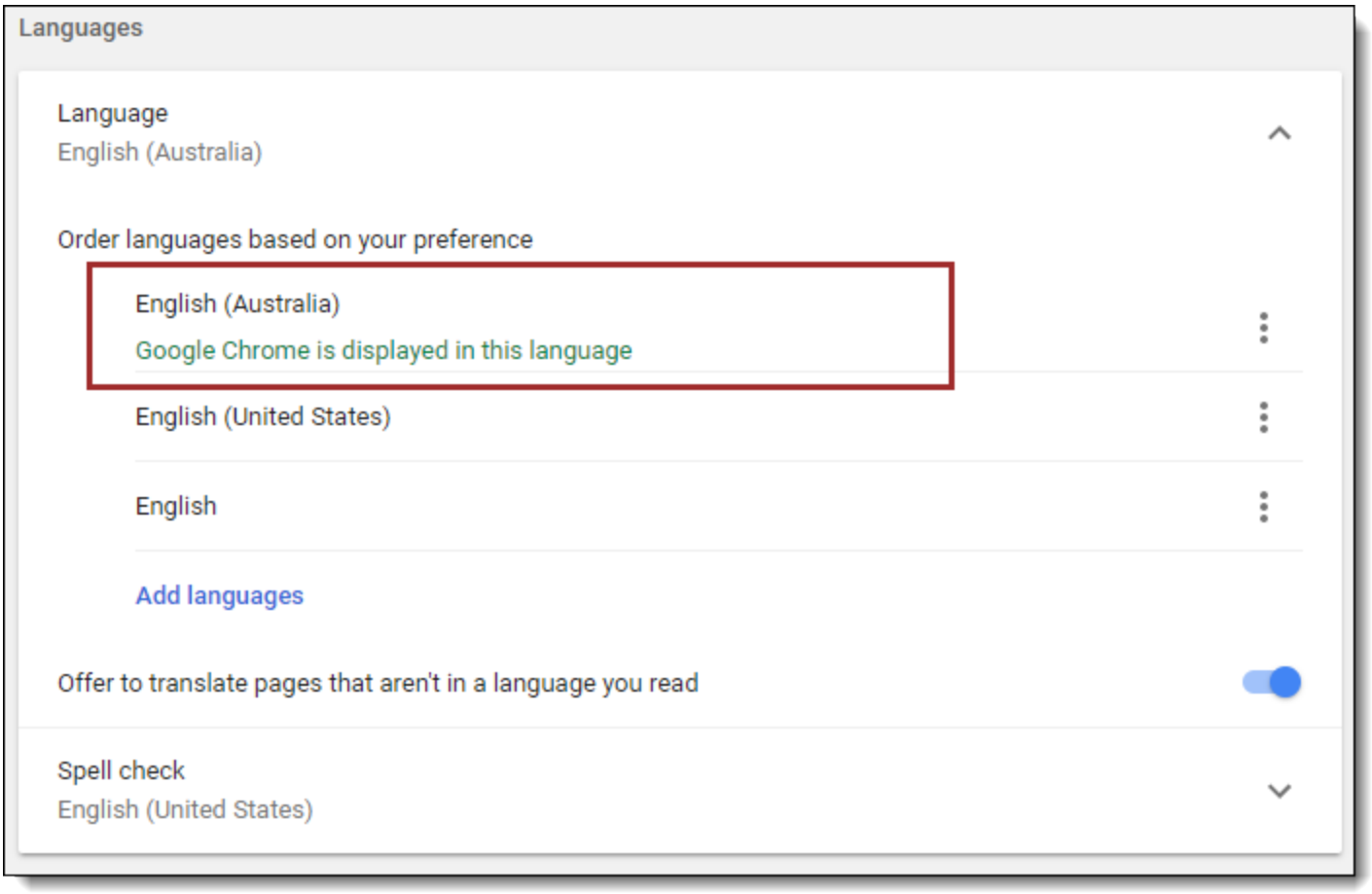
1. From the Integration Points landing page, click the **Integration Point Name** that you wish to disable.
2. Click **Edit**.
3. In the Scheduling section, select **No** for Enable Scheduler. The integration point is no longer scheduled to run.



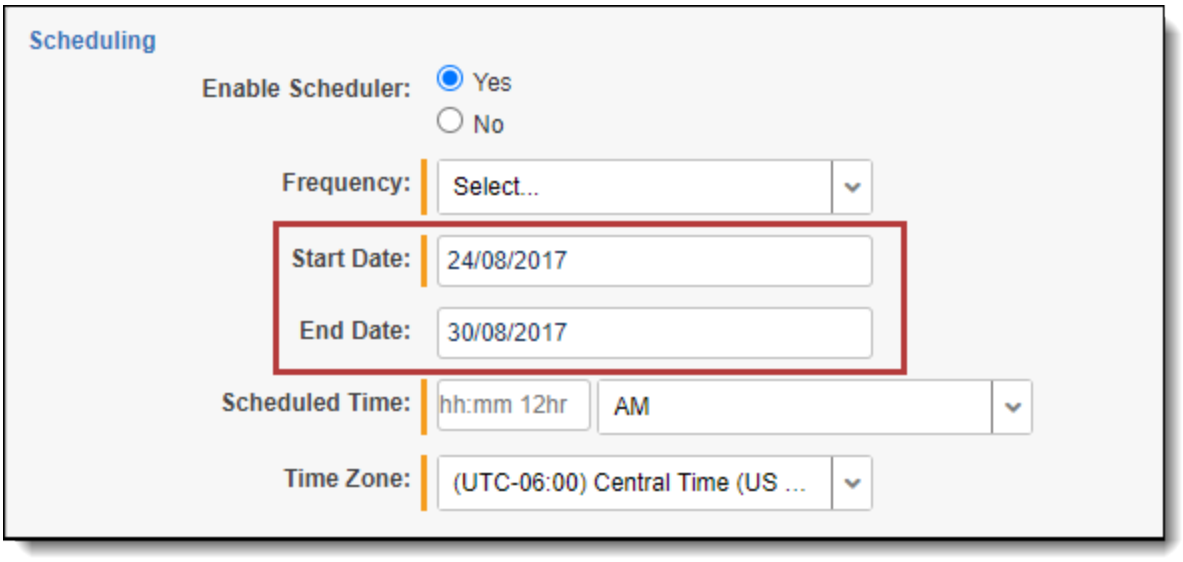
4.12 Scheduler date format considerations

The integration points scheduler accepts U.S. and non-U.S. date formats based off the default language setting in your browser settings.

For example, if the language setting is English (Australian), the date format would be Day/Month/Year instead of Month/Day/Year.



Relativity properly displays the date for the Start and End Date fields when setting up Scheduling.



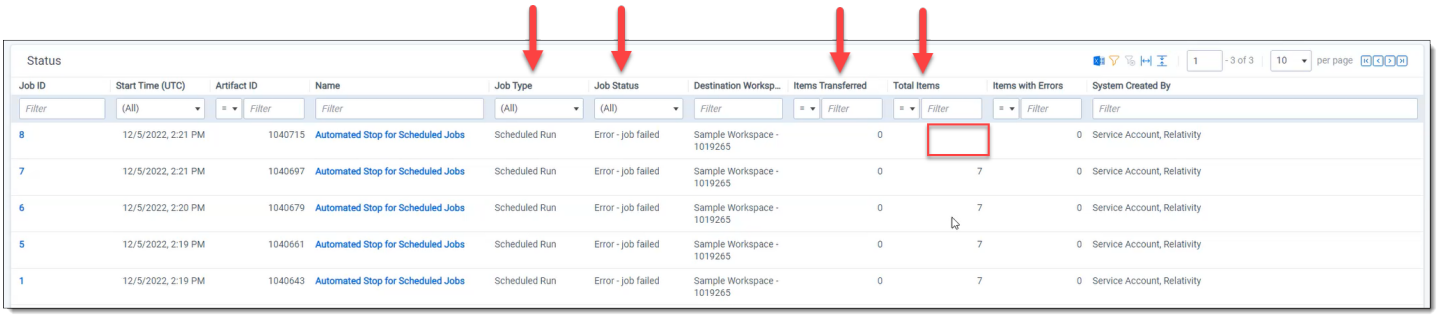
This date format appears in Relativity wherever a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

4.13 Automatically stopping a scheduled job that repeatedly fails

In some cases, a scheduled job may fail each time it is executed, and it may take some time before you become aware of the failed attempts. To mitigate this situation, you can configure an instance setting to specify the maximum number of consecutive failed attempts encountered before the job is automatically stopped. For example, you may want to stop the scheduled job after four consecutive failed attempts at running.

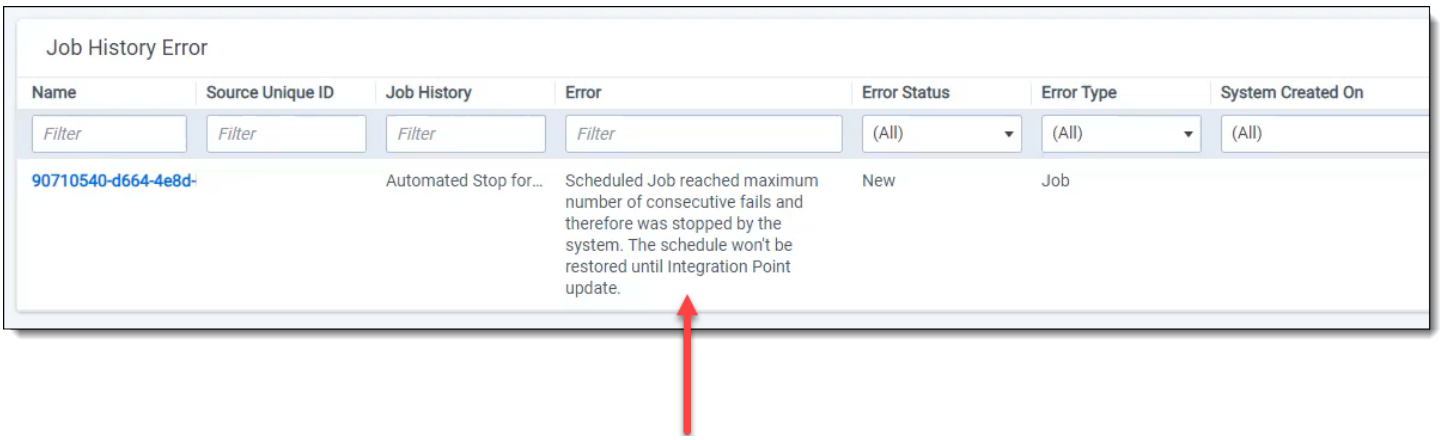
1. Navigate to the **Instance Settings** page.
2. Create a new instance setting with the following settings.
    - **Name**—enter **MaxFailedScheduledJobsCount**.
    - **Section**—enter **kcura.IntegrationPoints**.
    - **Value Type**—select **Integer 32-bit**.
    - **Value**—enter the number of consecutive failed attempts to be executed before the scheduled job is stopped.

The integration point's Scheduling tab displays the failed jobs with a Job Type of "Scheduled Run," Job Status of "Error - job failed," Items Transferred of "0," and Total Items based on the number of items in that job. The system will attempt one more run after the configured maximum number of consecutive failed attempts before it stops the scheduled job. The Total Items column will be blank.



The "Next Scheduled Runtime (UTC)" field on the Scheduling tab will be blank to let you know that the job is not scheduled to run again. You must correct the error(s) before it will run again as scheduled.

The Job History page displays the system-generated error description explaining why the scheduled job was stopped.


Job History Error
Name
Source Unique ID
Job History
Error
Error Status
Error Type
System Created On
Filter
Filter
Filter
Filter
(All)
(All)
(All)
90710540-d664-4e8d-
Automated Stop for...
Scheduled Job reached maximum number of consecutive fails and therefore was stopped by the system. The schedule won't be restored until Integration Point update.
New
Job

5 Exporting data through Integration Points

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

Integration Points provides you with the ability to export data directly from your workspace. This includes exporting saved searches, case folders, and productions directly from your workspace, and scheduling future or recurrent export jobs.

Notes:

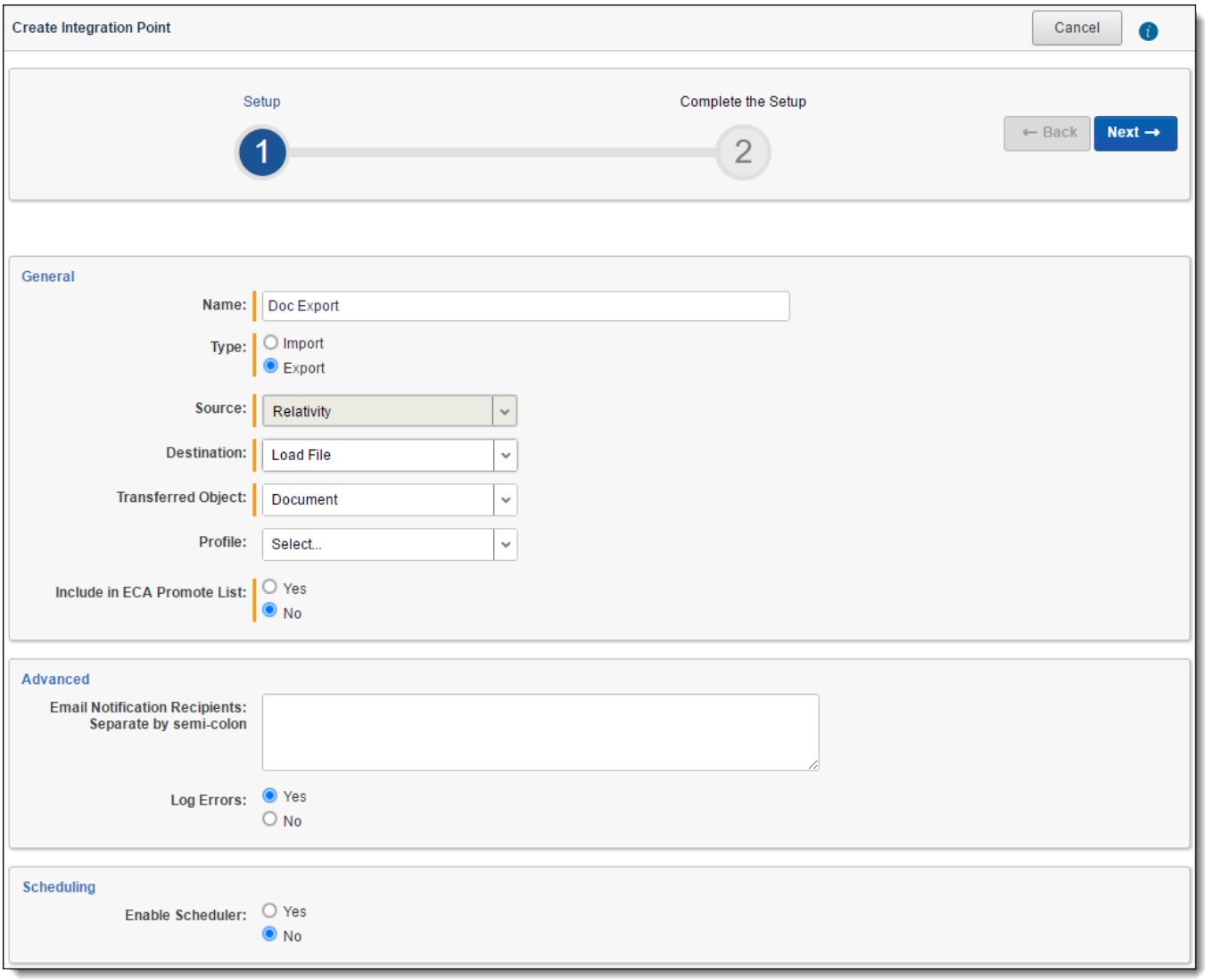
- Although importing and exporting a load file is possible in Integration Points, Import/Export is the main application recommended for a stable and efficient load file import and export.
- When you export data to a load file through Integration Points, your files are saved to a \StructuredData folder on the fileshare. To access this file share, look at the AppID in the URL of your Relativity environment and locate the folder on the fileshare.

5.1 Exporting a folder to load file

To create an integration point specifically for exporting a folder, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

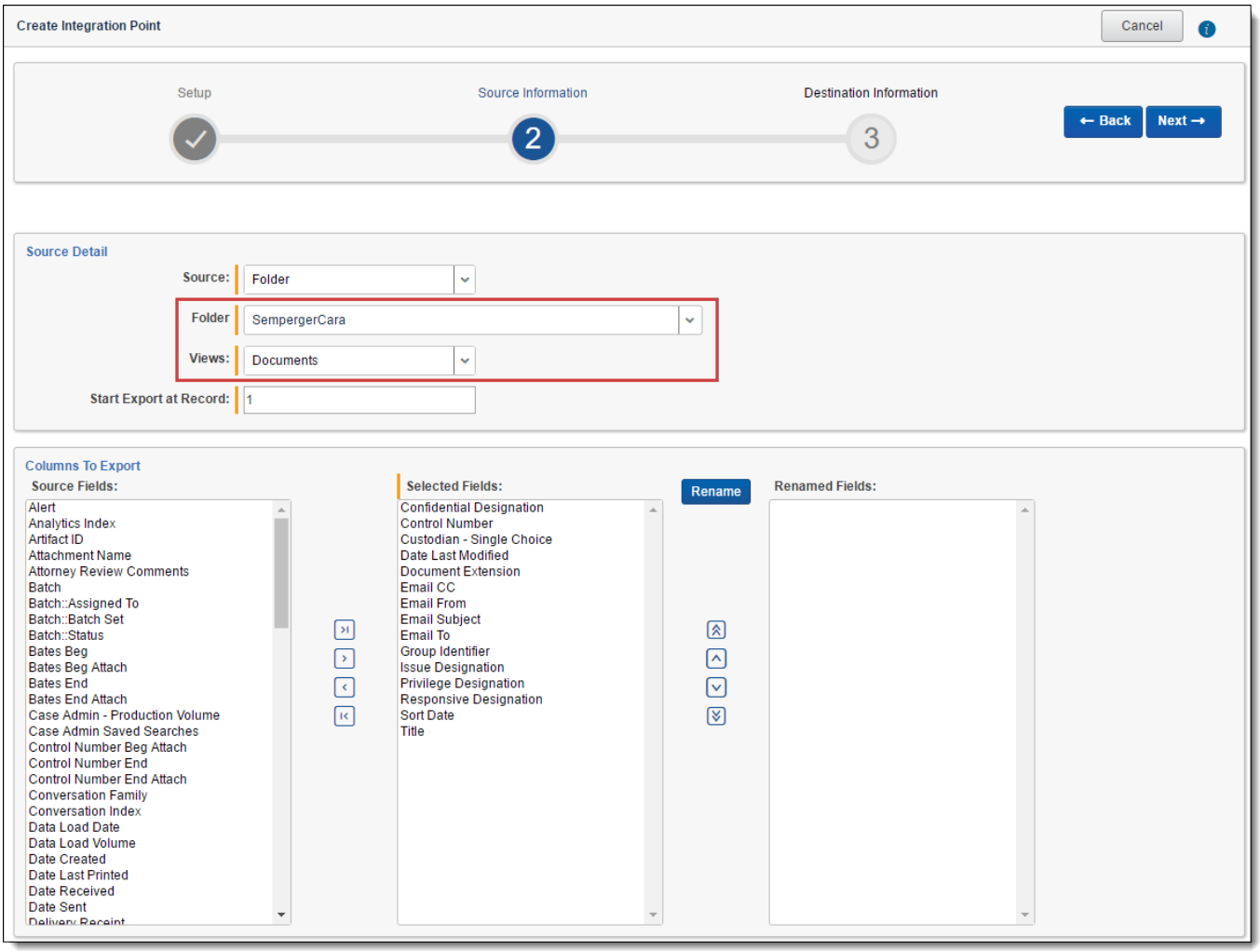


- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you previously created, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
  - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promotes data.
    - **Send On**
      - **Day __ the month**—select the day of the month that you want this integration point to promote data.
      - **The __ of the Month**—select this option for this integration point to promote dataon the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promotes date. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

5. Complete the following fields on the **Source Information** layout:



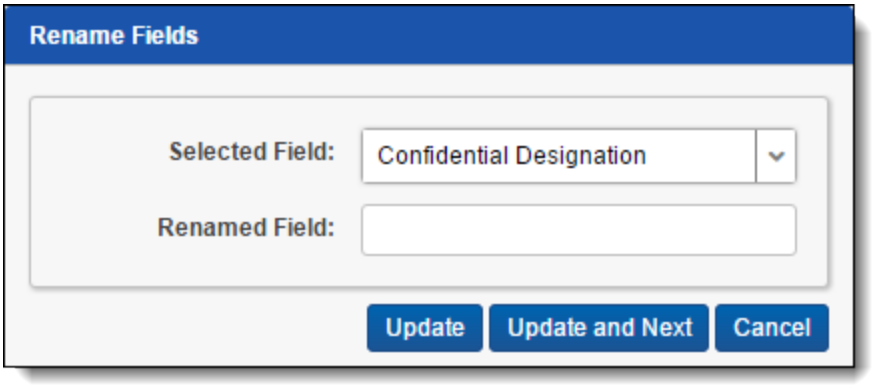
- **Source**—select **Folder** from the drop-down list. Specify that you want to select a folder, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder field. You will also need to select a View from the Views field.
- **Folder**—click on the down arrow and expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

  Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.
- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields

listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

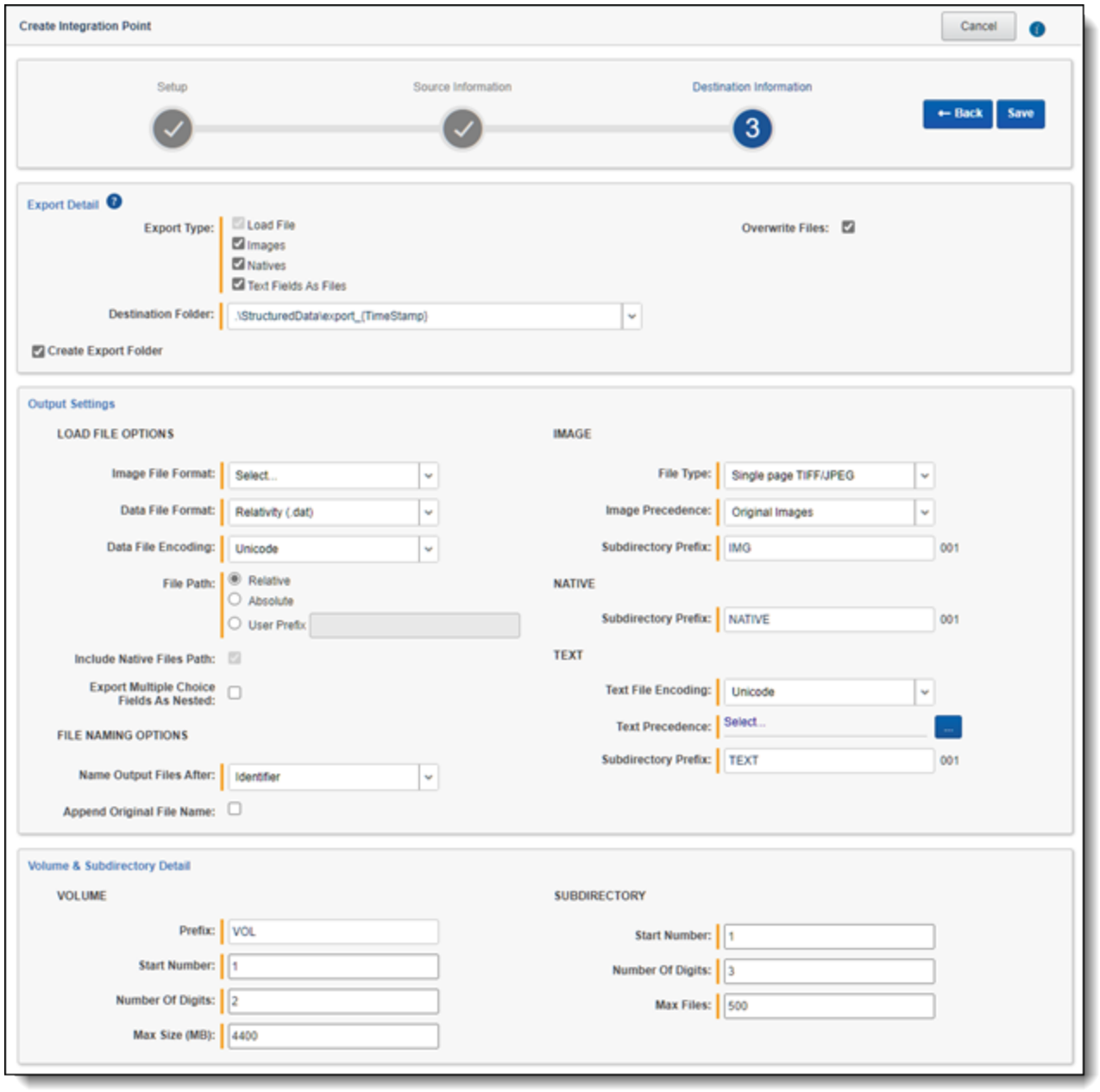
- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings and buttons in the Rename Fields window:



  - **Selected Field**—displays the current name of the field that you selected from the Source Fields column. To change its name, use the Renamed Field below.
  - **Renamed Field**—enter the new name for the Selected Field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
  - **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
  - **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
  - **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:



Load File Options

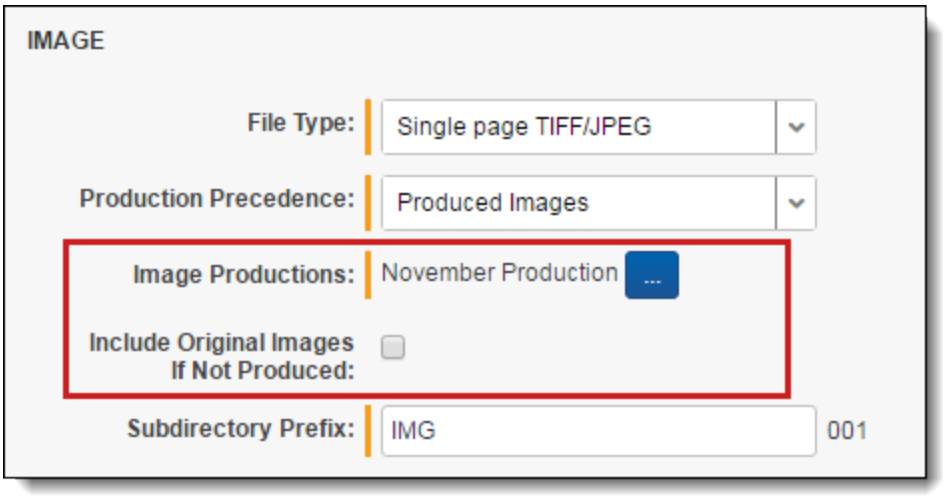
- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these options makes additional corresponding output settings available, which are described below.
    - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.

- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **promote data**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF

- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:



    - **Image Productions**—select the produced images that you want to act as the precedence.
    - **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

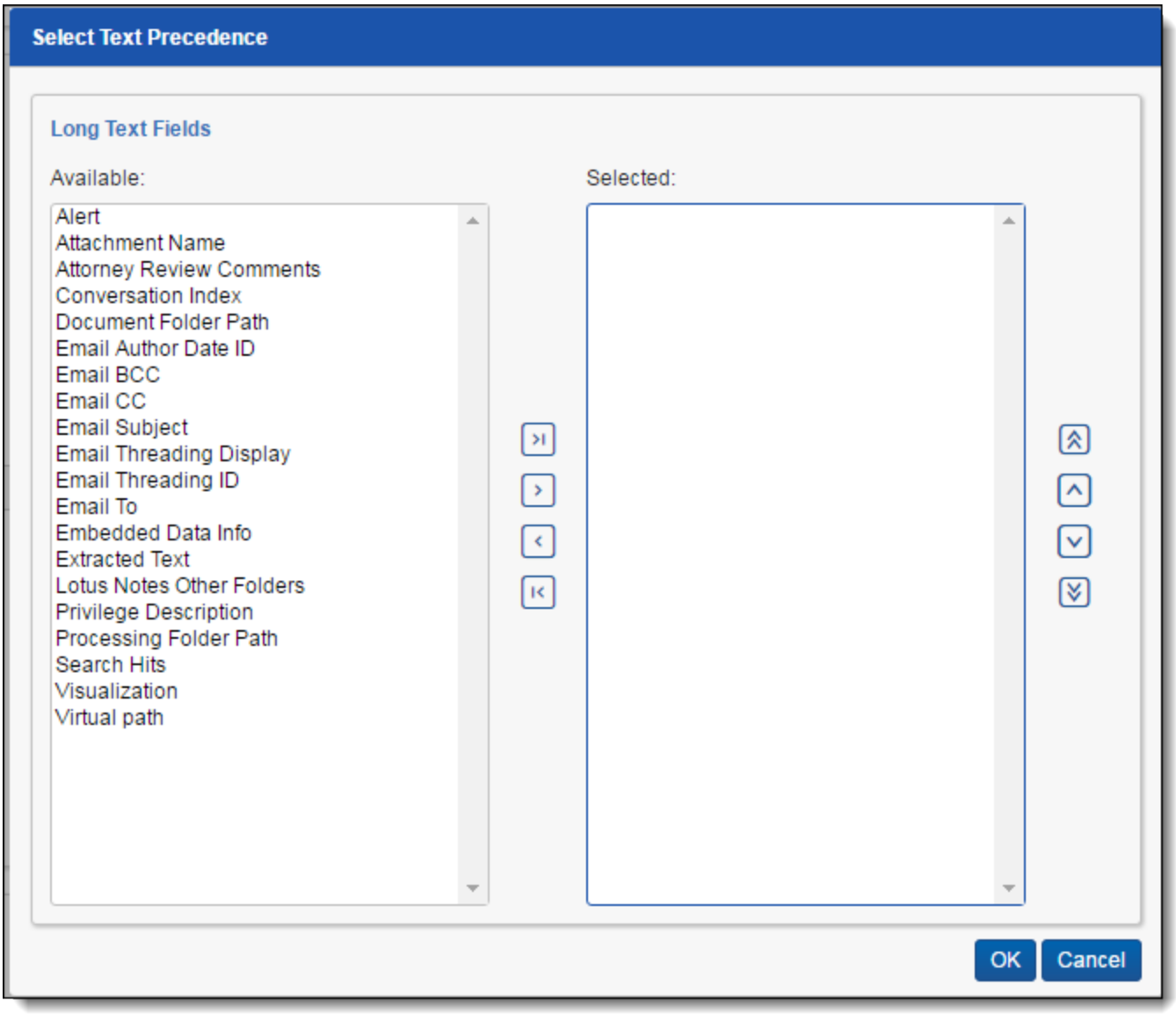
Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the

fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 3, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

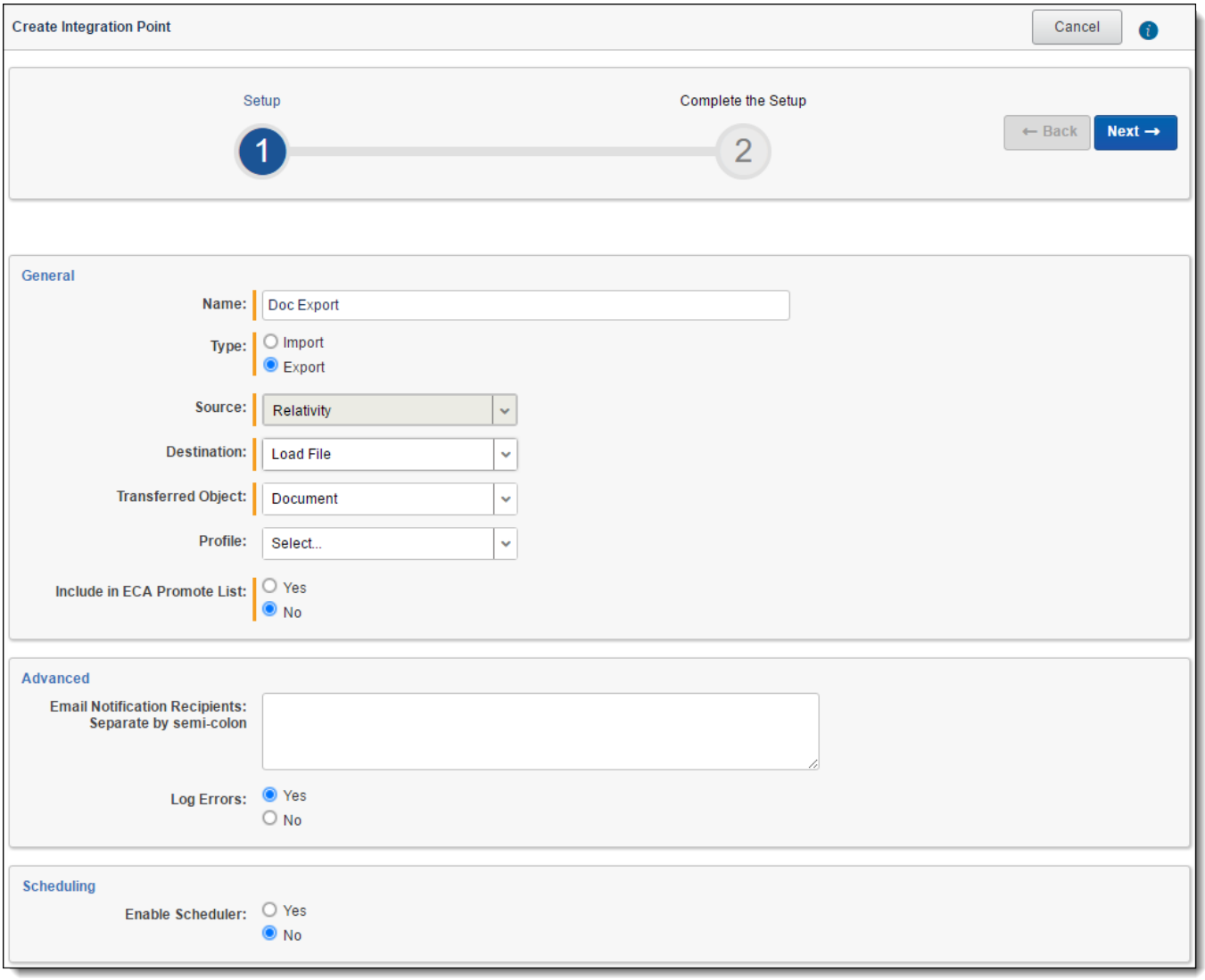
8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See Running the export job on page 84 for details.

5.2 Exporting a folder and subfolders to a load file

To create an integration point specifically for exporting a folder and subfolders, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

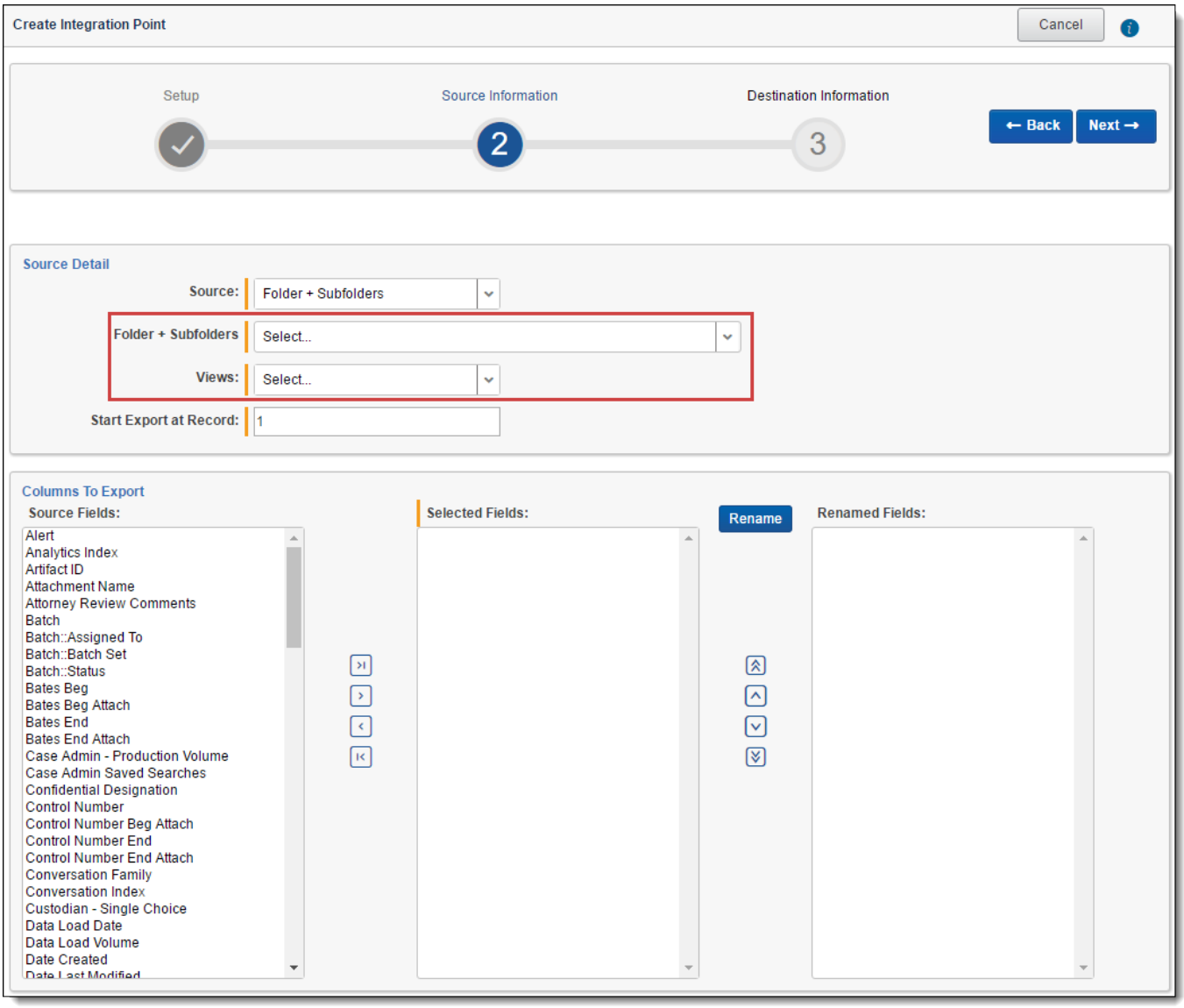


- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.

- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply an existing profile, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semicolons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
    - **Send On**
      - **Day __ the month**—select the day of the month that you want this integration point to promote data.
      - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

5. Complete the following fields on the **Source Information** layout:

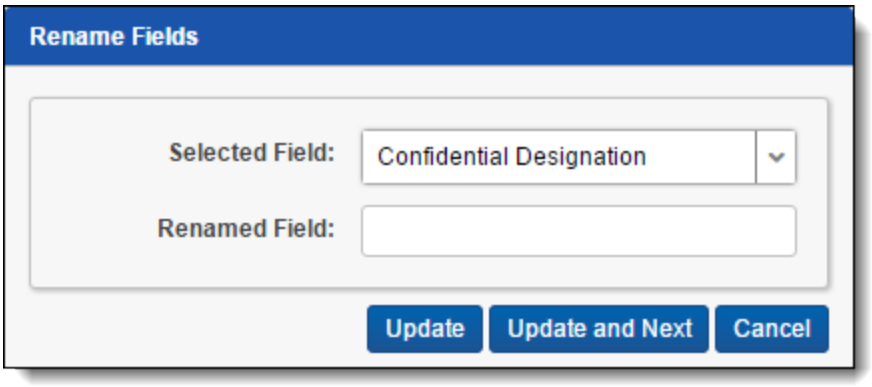


- **Source**—select **Folder + Subfolders** from the drop-down list and specify that you want to select a folder and subfolders from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Folder + Subfolders**—click on the down arrow and expand the folder structure, locate the folder and subfolders from which you want to export the data, and select it. This field is only available if you selected Folder + Subfolders as the source above.

  Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Views**—click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.

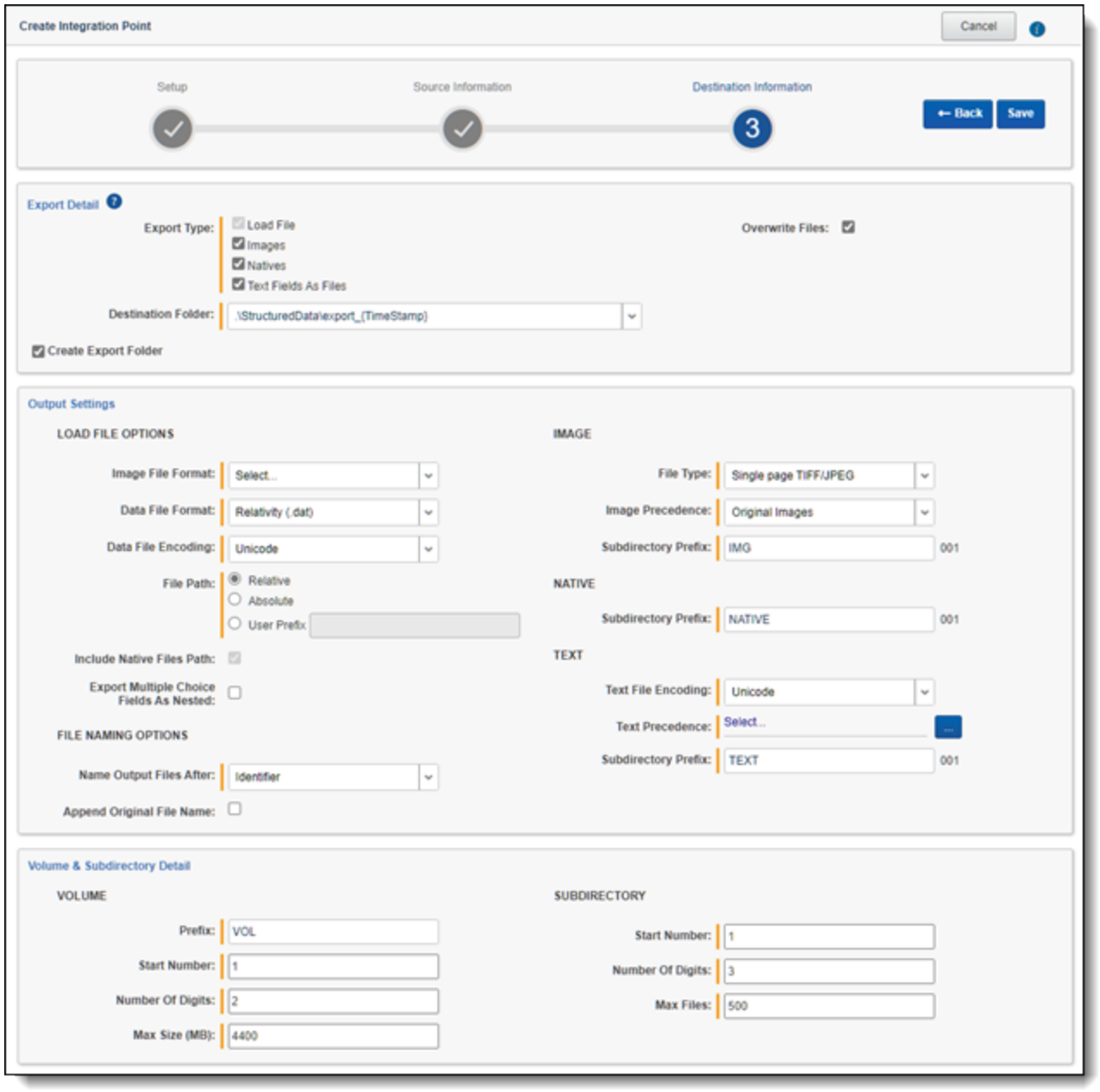
- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields | Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



  - **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
  - **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click the Update or Update and Next button below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
  - **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
  - **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
  - **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.

7. Complete the following fields on the **Destination Information** layout:



Load File Options

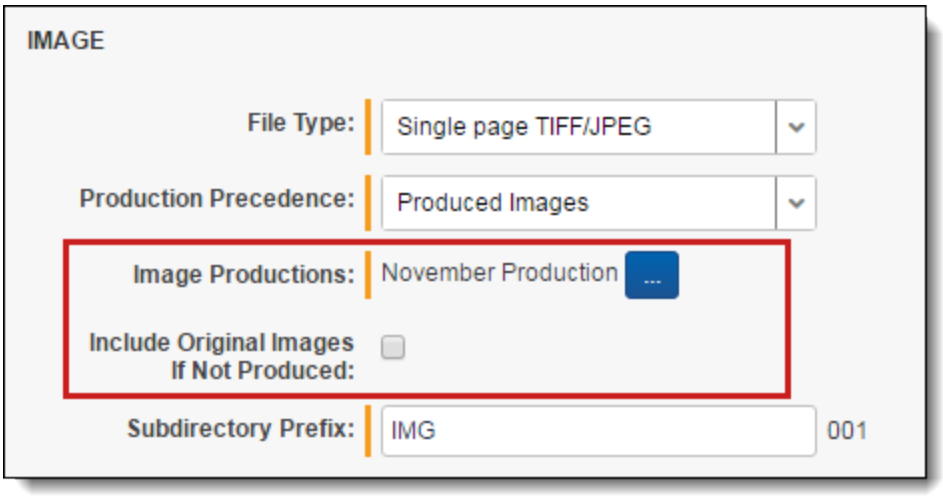
- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
    - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.

- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF

- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:



    - **Image Productions**—select the produced images that you want to act as the precedence.
    - **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

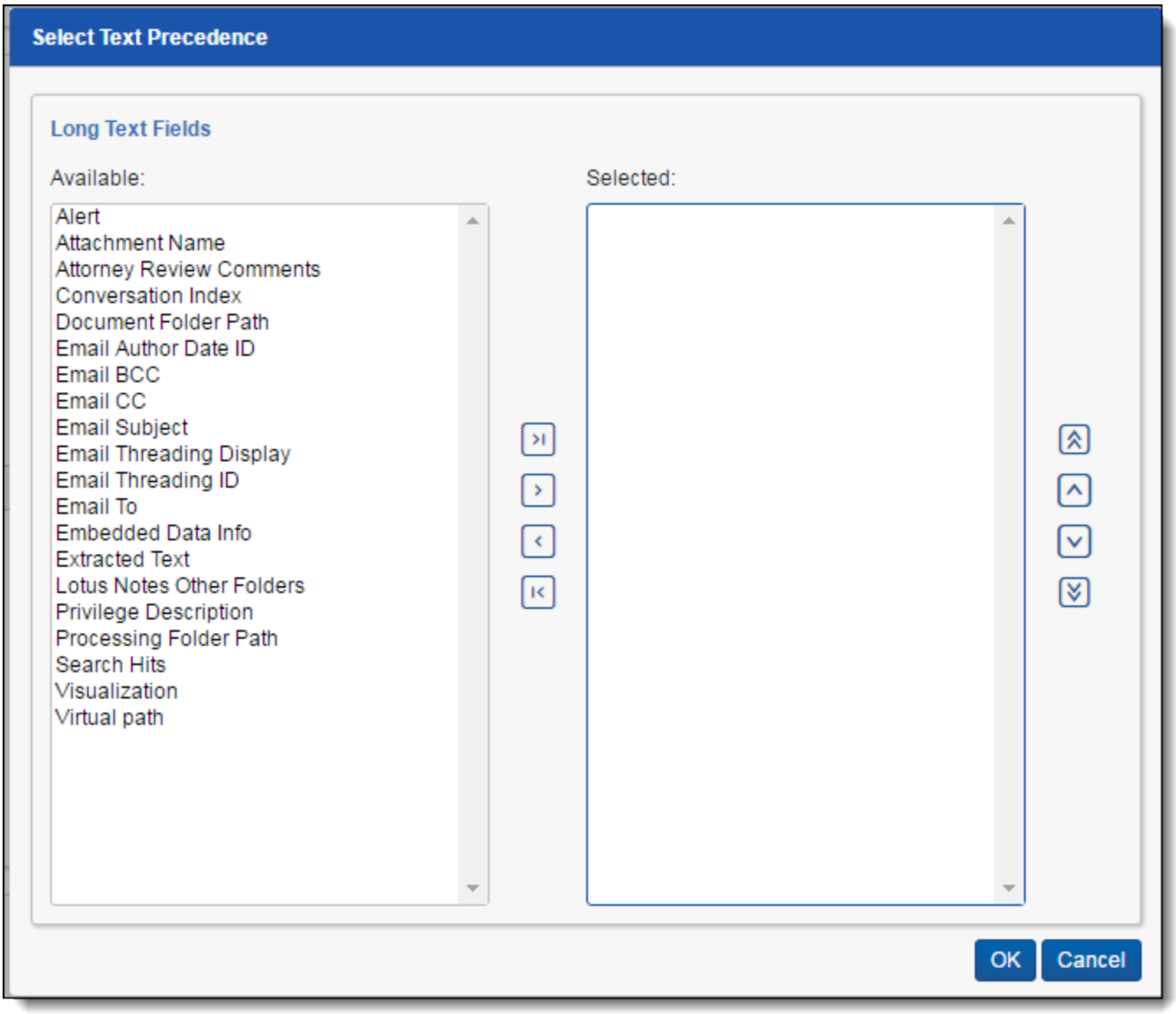
Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the

fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

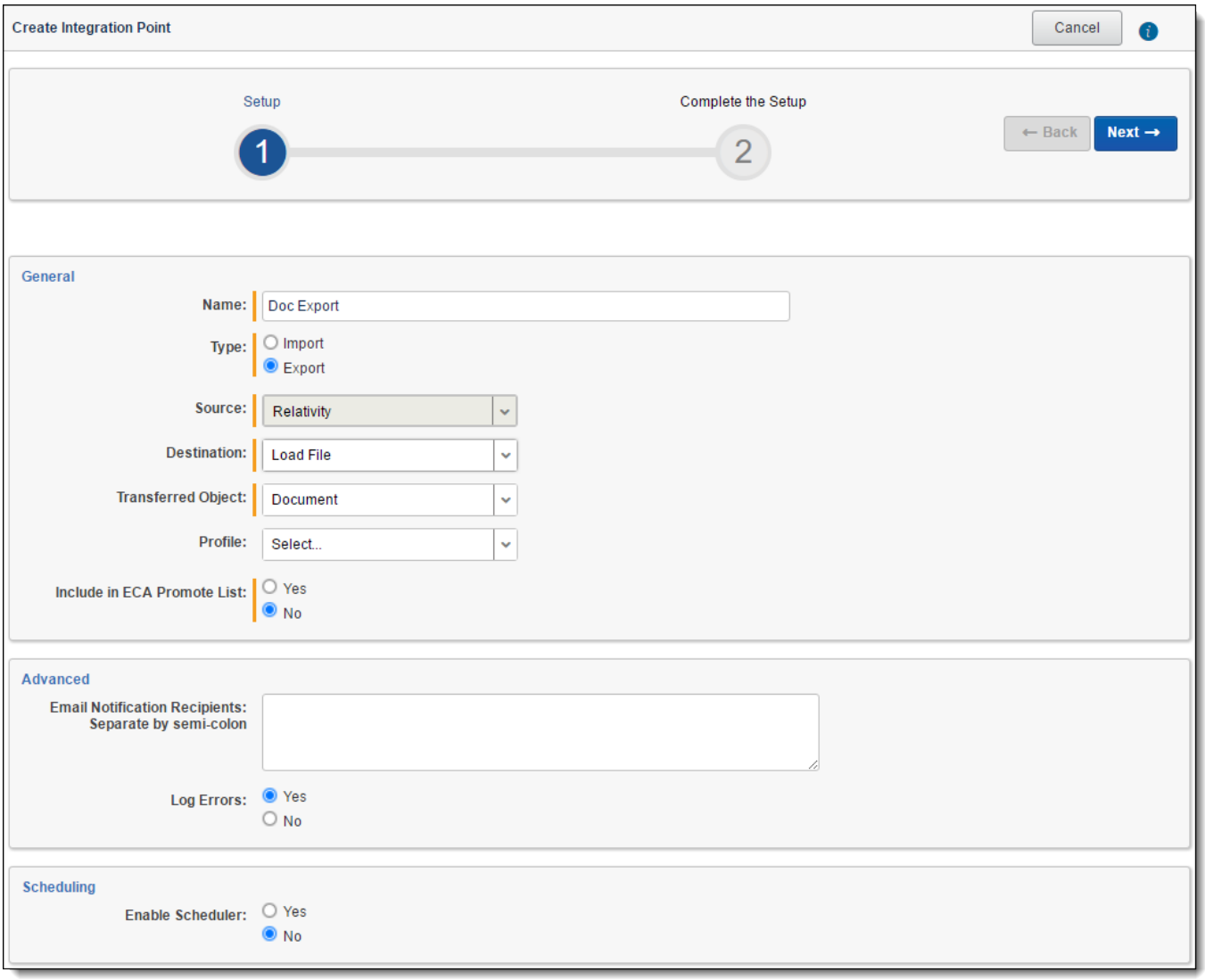
8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See Running the export job on page 84 for details.

5.3 Exporting a production to a load file

To create an integration point specifically for exporting a production set, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

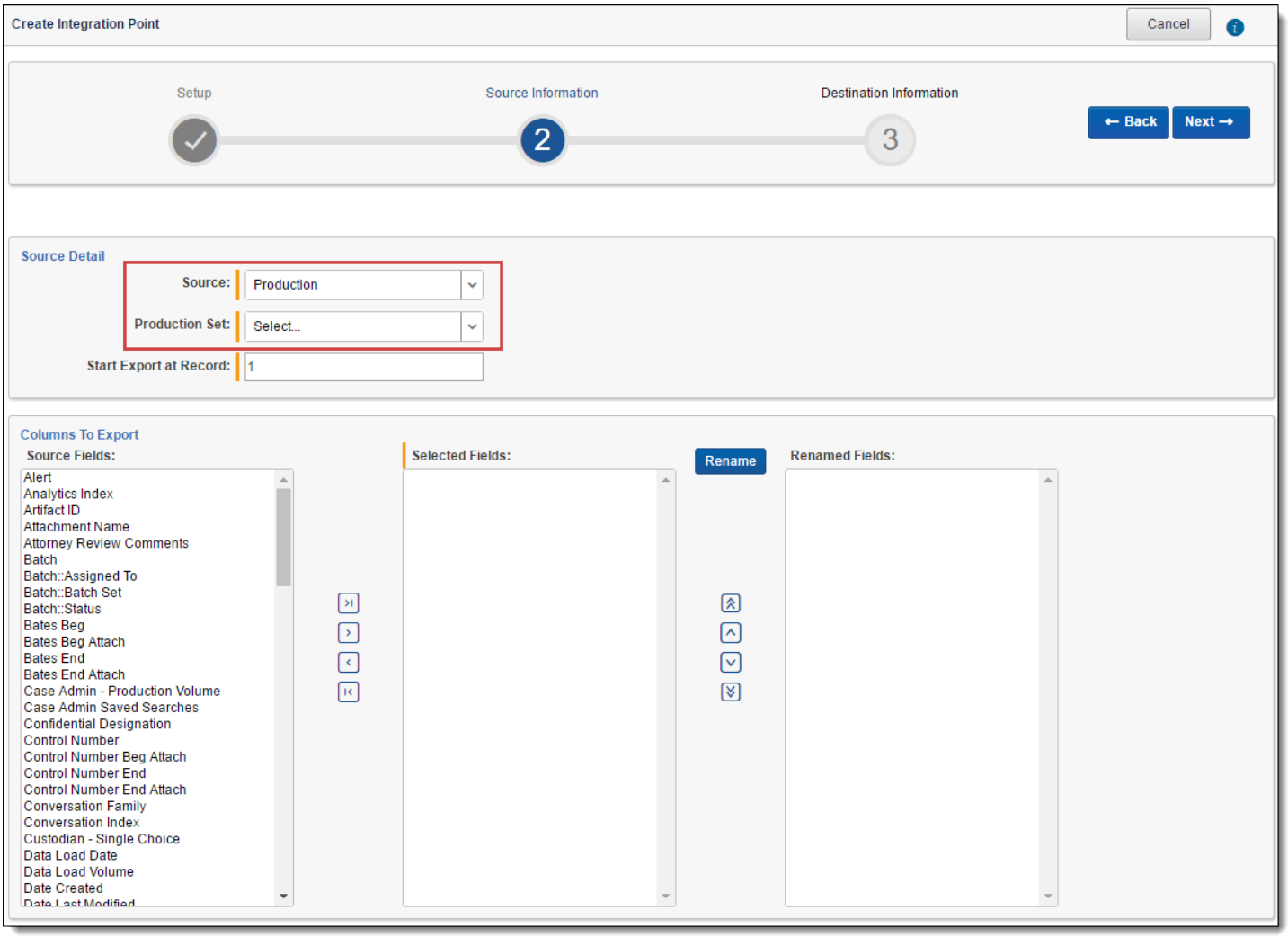


- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.

- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply an existing profile, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promotes data.
    - **Send On**
      - **Day __ the month**—select the day of the month that you want this integration point to promote data.
      - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promotes data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

5. Complete the following fields on the **Source Information** layout:



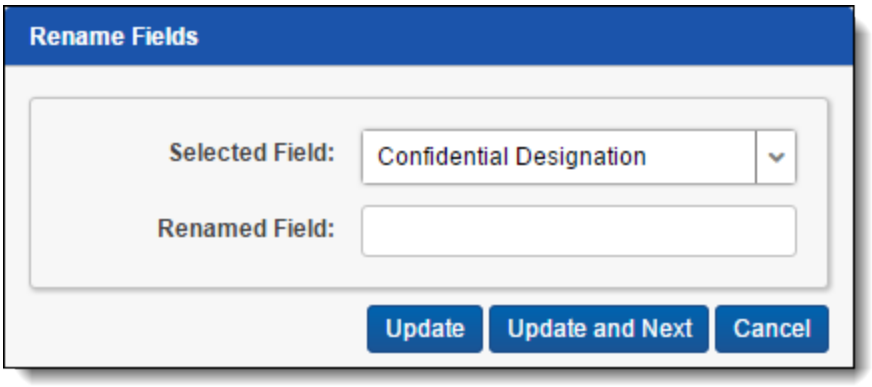
- **Source**—select **Production** from the drop-down list. specify that you want to select a production set, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Production Set**—click on the down arrow and select the production set that you want to act as the source for the load file. This field is only available if you have selected Production as the source above.

  Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your

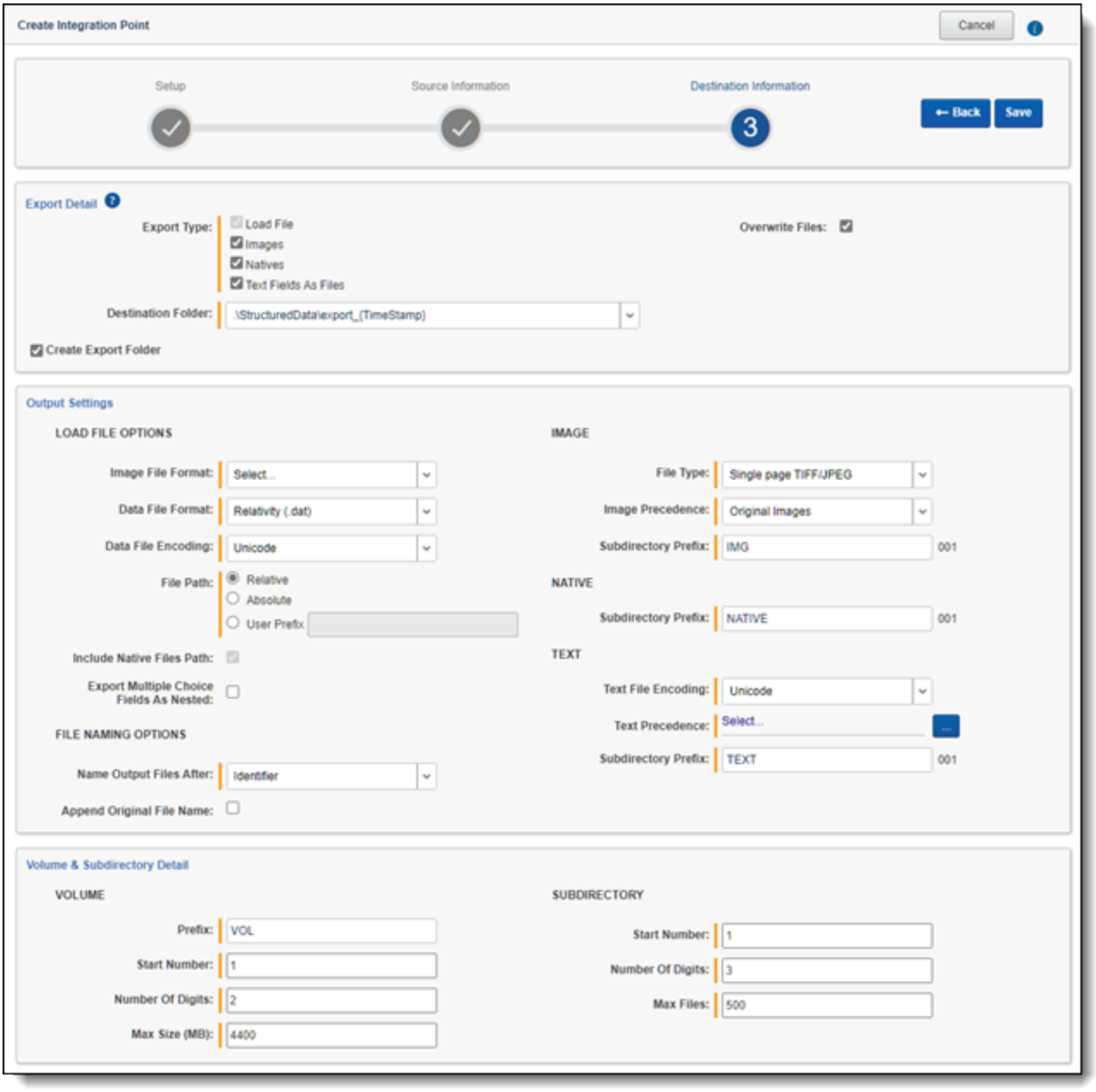
load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



  - **Selected Field**—displays the field that you have selected from the Source Fields column, the name of which you can change in the Renamed Field below.
  - **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
  - **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
  - **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
  - **Cancel** button—click this button to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.
7. Complete the following fields on the **Destination Information** layout:



Load File Options

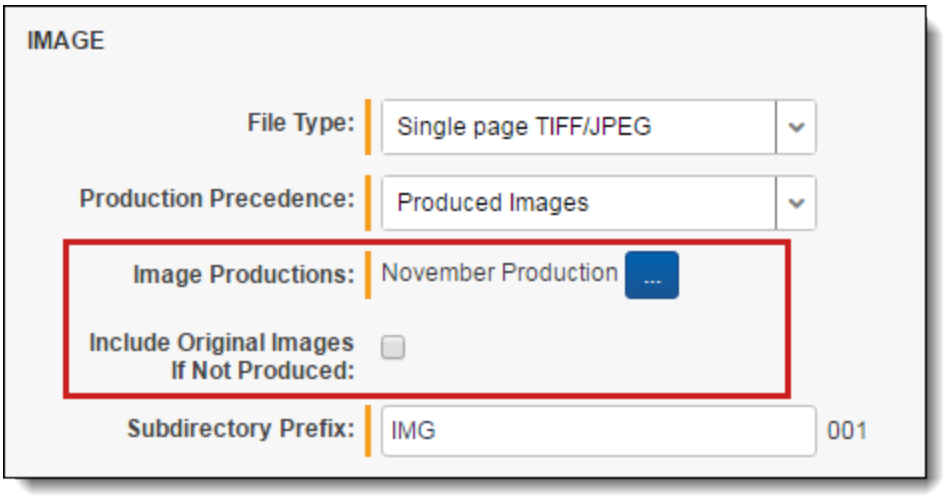
- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
  - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.

- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF

- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:



    - **Image Productions**—select the produced images that you want to act as the precedence.
    - **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

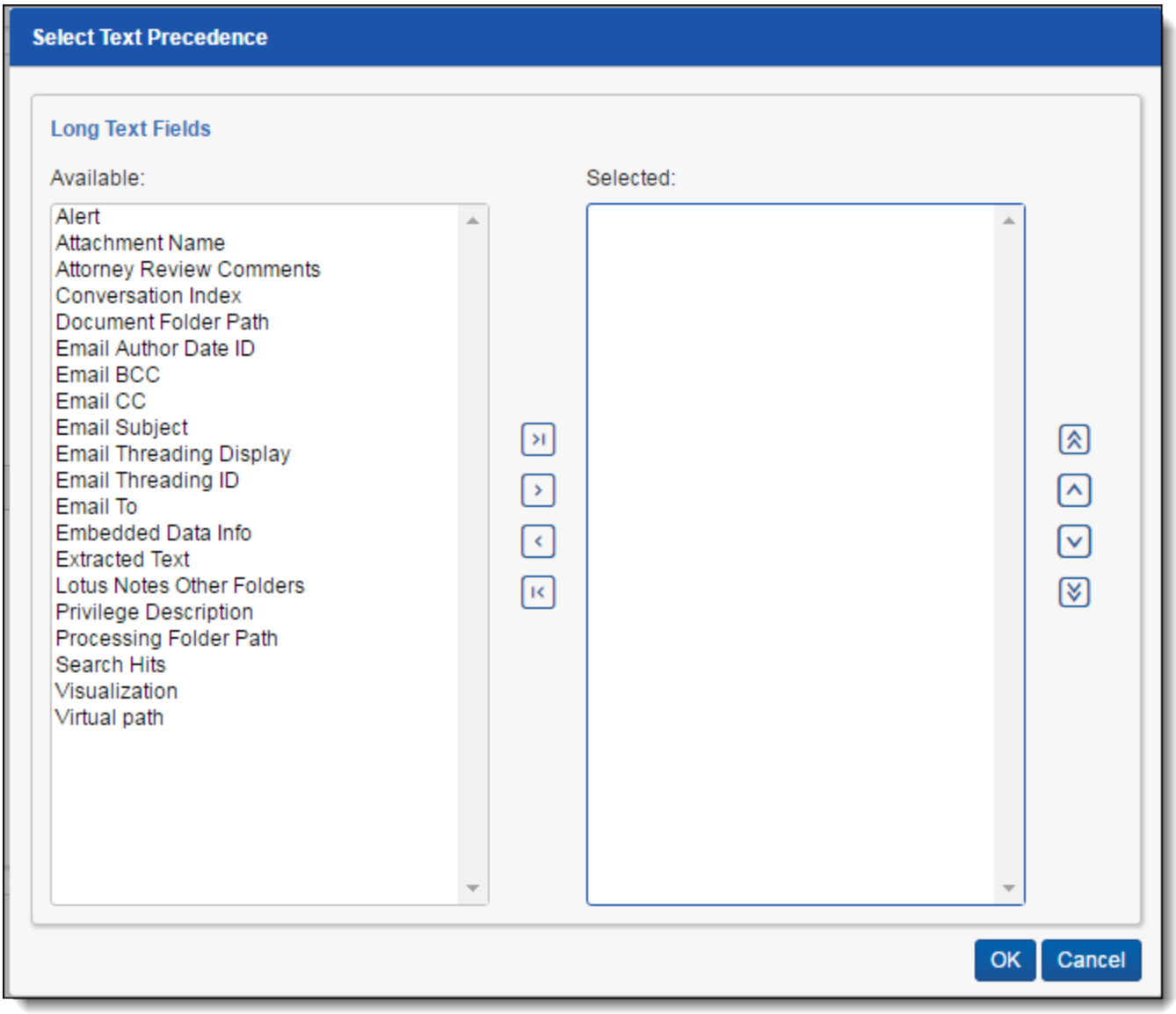
Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the

fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

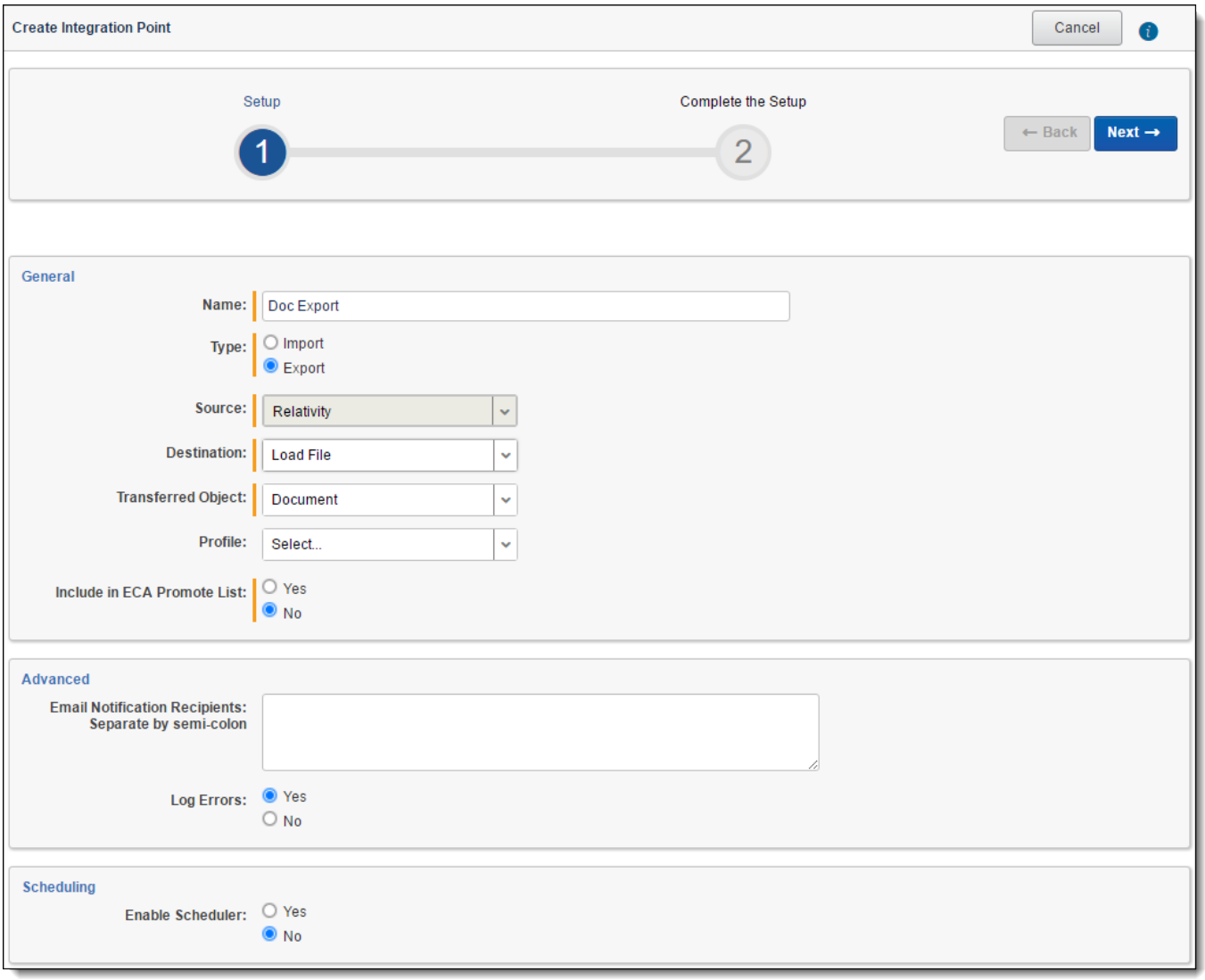
8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See Running the export job on page 84 for details.

5.4 Exporting a saved search to a load file

To create an integration point specifically for exporting a saved search, perform the following steps:

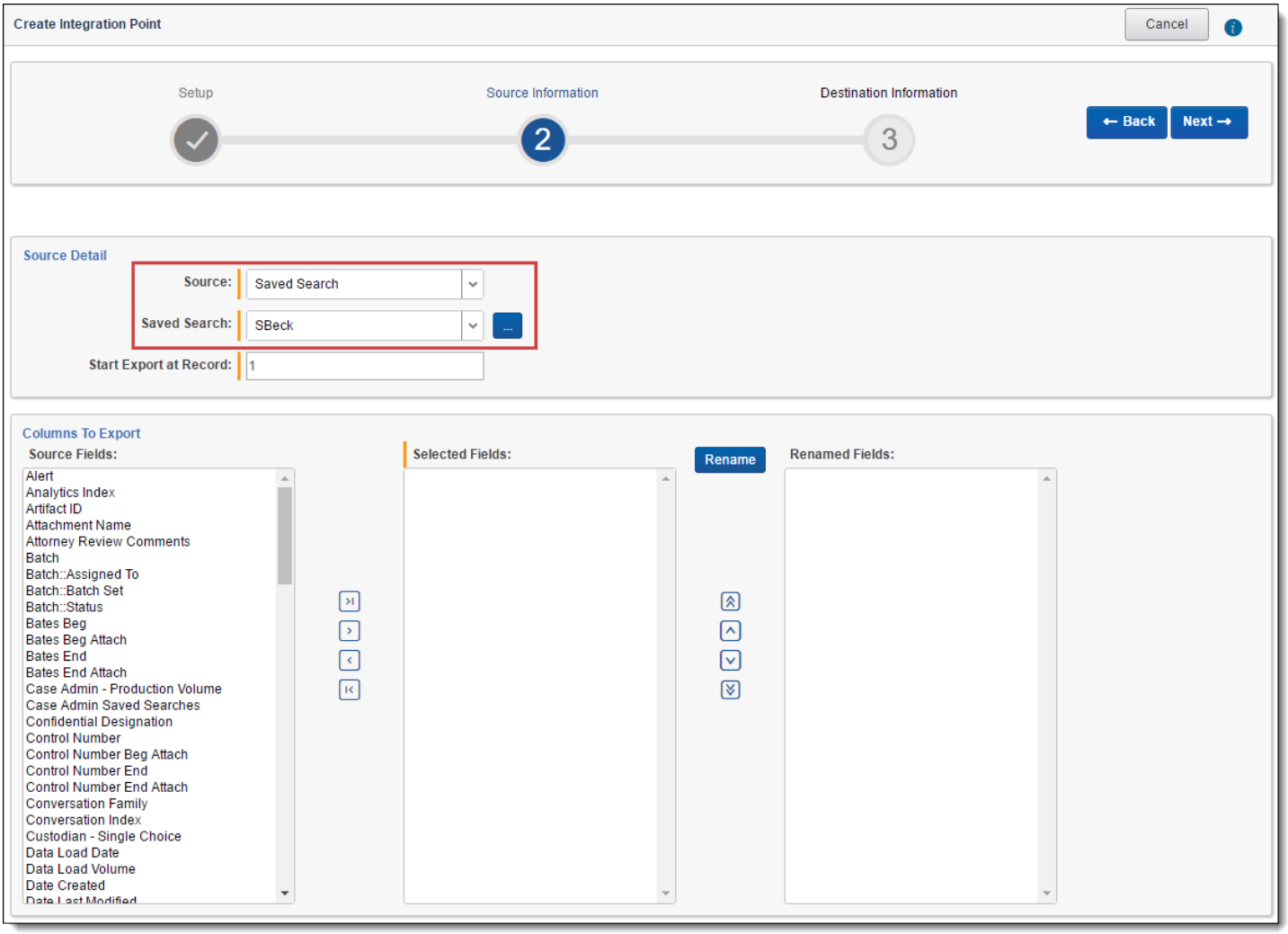
1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:



- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.

- **Destination**—select **Load File**.
- **Transferred Object**—select **Document**.
- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you previously created, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
  - If you select **Yes**, each job also logs any item level errors.
  - If you select **No**, Relativity does not log these item level errors.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
  - **Frequency**—the interval at which Relativity promotes data using this integration point.
    - **Daily**—select this option to promote data once every day.
    - **Weekly**—select this option to promote data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data promotion will take place by checking any of the days of the week listed.
    - **Monthly**—select the day of the month that you want this integration point to promote data once every month.
    - **Reoccur**—enter the number of month(s) in which this integration point recurrently promote data.
    - **Send On**
      - **Day __ the month**—select the day of the month that you want this integration point to promote data.
      - **The __ of the Month**—select this option for this integration point to promote data on the chosen day of every month. For example, "The **Second Friday** of the month."
  - **Start Date**—the date that you want Integration Points to start promoting the data.
  - **End Date**—(Optional) the date that you want Integration Points to stop promoting the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
  - **Scheduled Time**—the time at which this integration point promote data. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.
5. Complete the following fields on the **Source Information** layout:



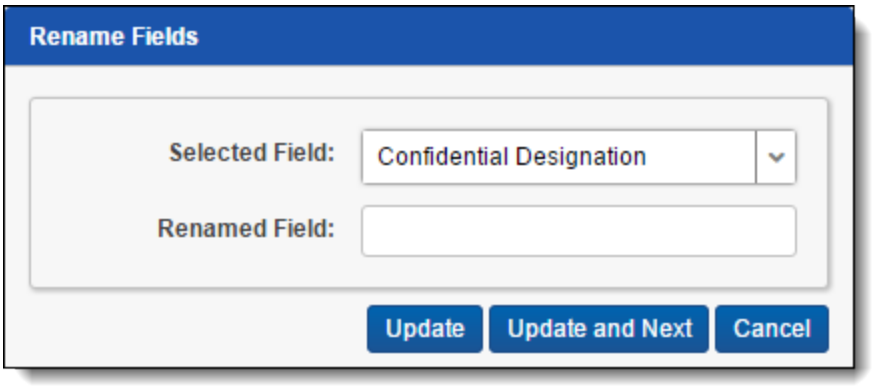
- **Source**—select **Saved Search** from the drop-down list. specify that you want to select a saved search, from which you want export the data in your load file. You will select this folder below from the folder structure in the Folder + Subfolders field. You will also need to select a View from the Views field.
- **Saved Search**—click on the down arrow and select the saved search that you want to act as the source for the load file. This field is only available if you selected Saved Search as the source above.

  Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record**—select a record number that identifies the initial document for export. Integration Points exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields**—choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your

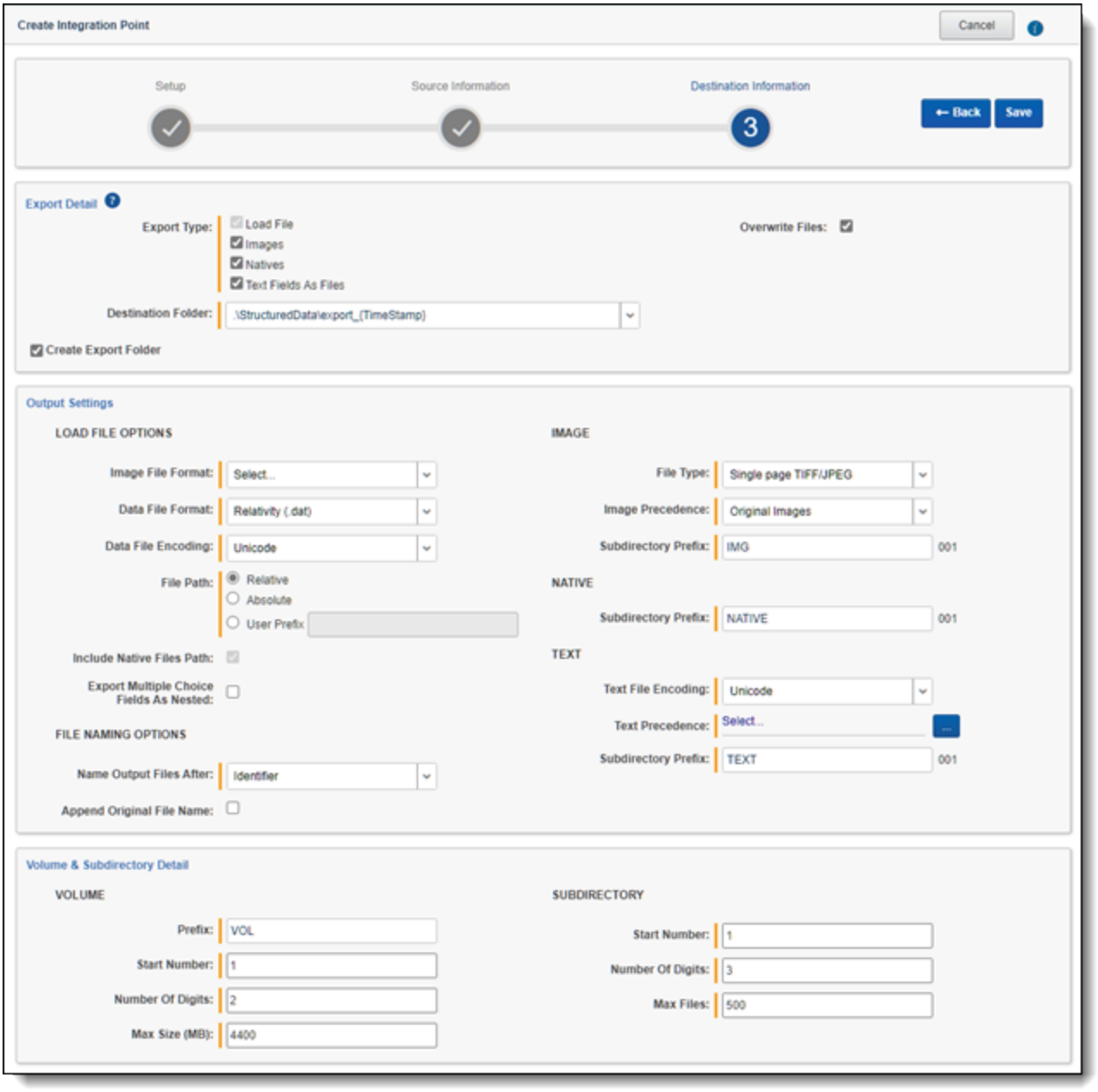
load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename**—gives you the option of renaming the fields in your load file before exporting them. When you click this button, you are presented with the following settings in the Rename Fields window:



  - **Selected Field**—displays the field that you selected from the Source Fields column, the name of which you can change in the Renamed Field below.
  - **Renamed Field**—enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you do not change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
  - **Update** button—click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
  - **Update and Next** button—click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
  - **Cancel** button—click this to exit the Rename Fields window without applying any changes to current field names.

6. Click **Next** to advance to the Destination Information layout.
7. Complete the following fields on the **Destination Information** layout:



Load File Options

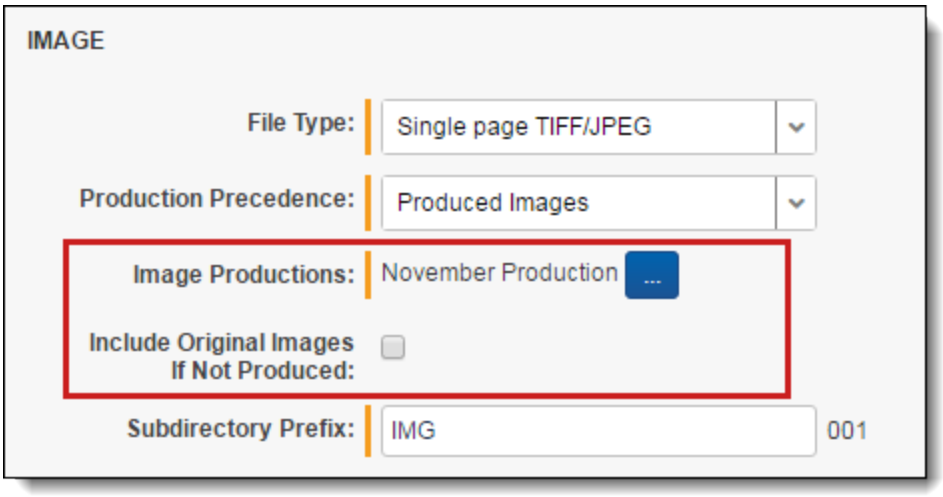
- **Export Type**—this field reflects the type of export job you are running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
  - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder**—specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.

- **Create Export Folder**—check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format**—select one of these formats for image-level load file:
  - Opticon
  - IPRO
  - IPRO (Full Text)
- **Data File Format**—select a the format for the document-level load file you are exporting:
  - **Relativity (.dat)**—load file exports with the standard Concordance delimiters.
  - **HTML (.html)**—load file is in HTML and contains hyperlinks to launch any exported files.
  - **Comma-separated (.csv)**—load file exports as delimited text file that uses a comma to separate values.
  - **Custom (.txt)**—load file exports with the custom delimiters that you select.
- **Data File Encoding**—select an encoding for the document-level load file from the drop-down box.
- **File Path**—controls how the export path for the files is referenced. Select one of the following options:
  - **Use absolute paths**—paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
  - **Use relative paths**—paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
  - **Use prefix**—a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path**—check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you are exporting.
- **Export Multiple Choice Fields as Nested**—select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After**—select one of the following naming convention for exported files:
  - **Identifier**—select this option to name the files after the identifier for your workspace.
  - **Begin production number**—select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name**—select this option to append the original name of the file to the end of the exported file name.

Image—the following fields are only available if you selected Images for the Export Type field above.

- **File Type**—select one of these file types:
  - Single-page TIF/JPG
  - Multi-page TIF
  - PDF

- **Production Precedence**—select one of the following groups of produced documents for export instead of the original images:
  - **Original Images**—exports only the original, non-produced images.
  - **Produced Images**—exports a produced version of the images. When you select this, the following fields become available:



    - **Image Productions**—select the produced images that you want to act as the precedence.
    - **Include Original Images If Not Produced**—exports only the original images in the event that they have not been produced.
- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

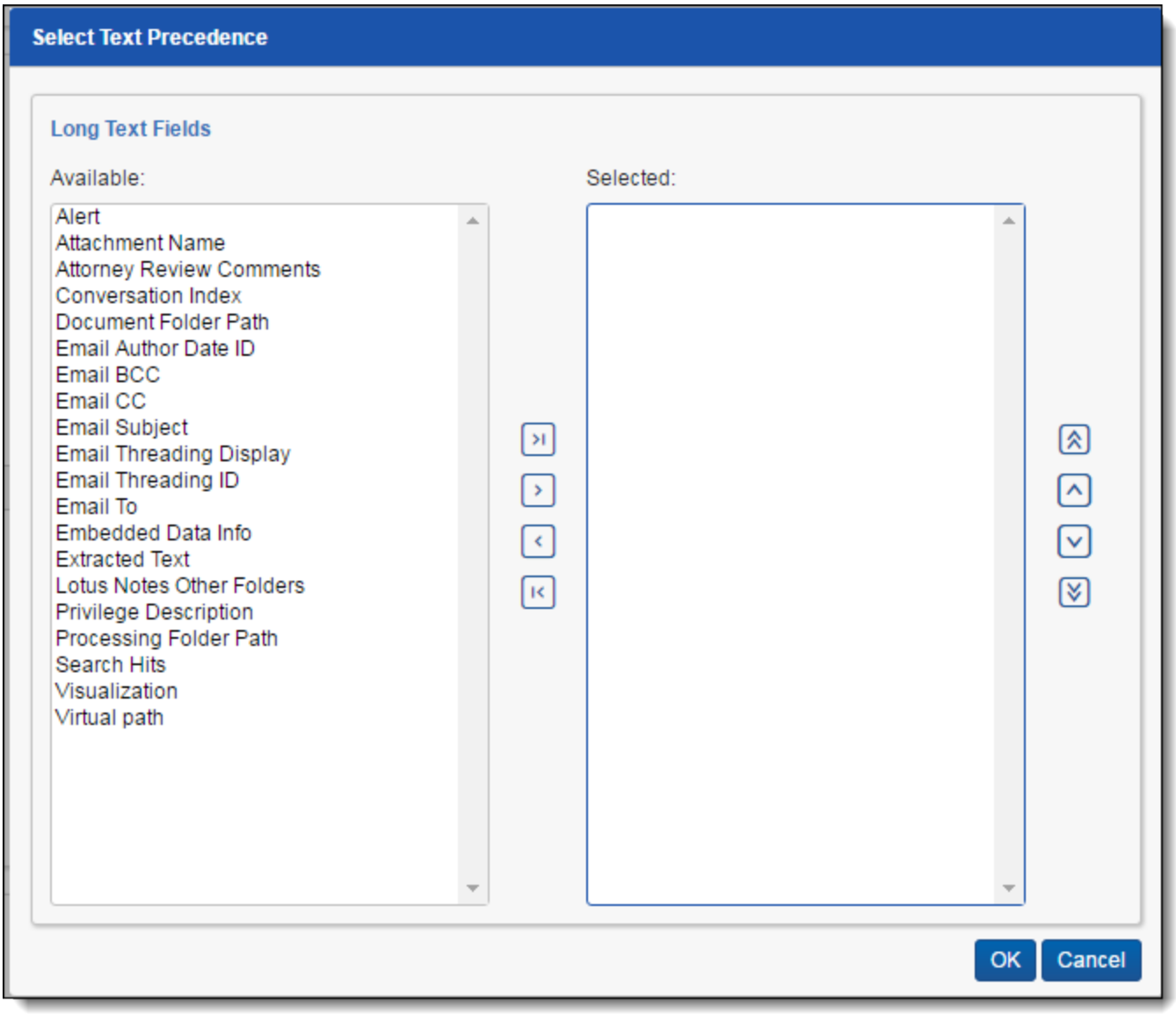
Native

- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text—the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding**—select the encoding for the document-level text files
- **Text Precedence**—select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of the

fields.



- **Subdirectory Prefix**—enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix**—enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number**—select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits**—select the number of digits attached to the prefix. (For example, if you select 2, the output is VOL001, VOL002, and so on.)
- **Max Size (MB)**—select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number**—select the starting number for the subdirectories.
- **Number of Digits**—select the number of digits of the subdirectory prefix (For example, if you select 3, the output is IMG001, IMG002, and so on.)
- **Max Files**—select the number of files to store in each subdirectory.

8. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See Running the export job below for details.

5.5 Exporting to a Relativity workspace

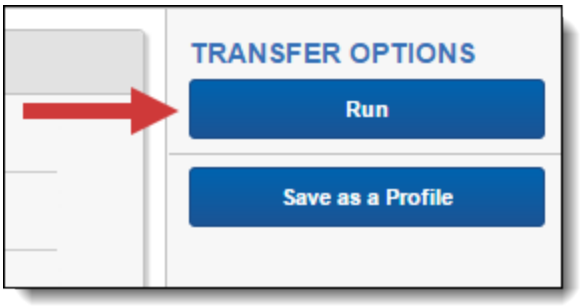
In addition to exporting to a CSV and load file, you have the option of exporting data from one Relativity workspace to another Relativity workspace. For more information on this capability, see Transferring (promoting) data between workspaces on page 90.

5.6 Running the export job

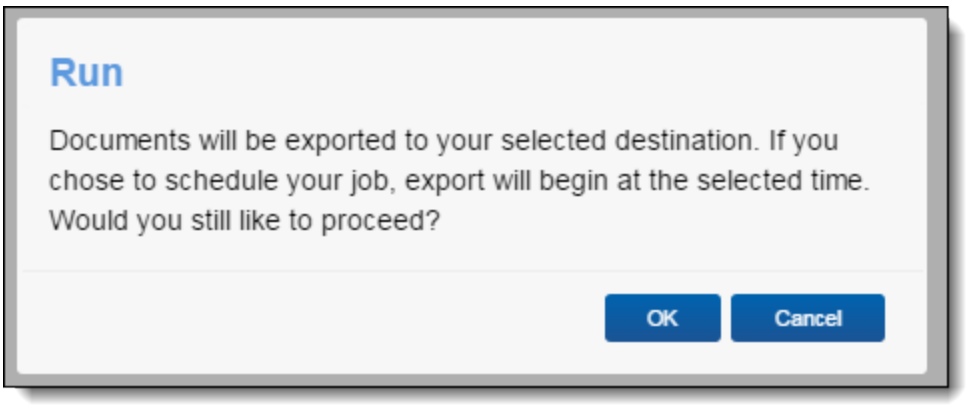
To export your load file based on the export settings you specified above, click **Run** on the Transfer Options console on the saved integration point.

Note: All Integration Points jobs are fully editable after run.

Note that you also have the option of saving this integration point as a profile through the Save as Profile button on the Transfer Options console. For more information on profiles, see Integration Points profiles on page 10.



Click **OK** on the run confirmation message, which informs you of where your documents will be placed.



The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You will see any of the following status values:

- **Pending**—the job has yet to be picked up by an agent.
- **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to

"Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."

- **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
- **Processing**—the agent has picked up the job and is in the process of completing it.
- **Completed**—the job is complete, and no errors occurred.
- **Completed with errors**—the job is complete and errors have occurred. You can view error details in the Job History Errors tab. See Monitoring job history and errors on page 104 for details.
- **Error—job failed**—a job-level error occurred and the job did not complete because it failed. You can view error details in the Job History Errors tab. See Monitoring job history and errors on page 104 for details.
- **Stopping**—you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped**—the job has been stopped.

5.6.1 Stopping and restarting an export job

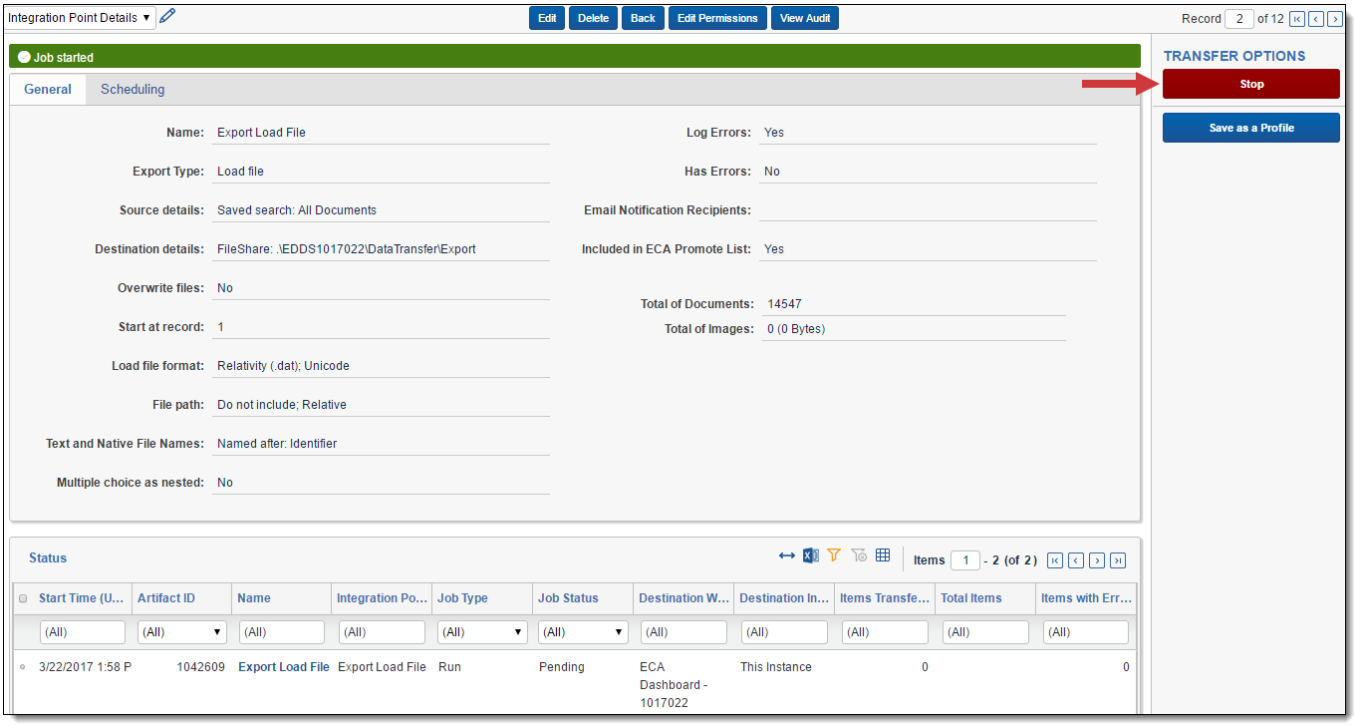
Relativity gives you the option of stopping an export job from proceeding in the event that you need to re-prioritize it or because you made a mistake when creating it. You can only do so when that job has a status of Pending or Processing.

Note the following about stopping an Integration Points job:

- You can also stop a scheduled job if it has a status of Pending or Processing.
- A job is cannot be stopped if it has any status other than Pending or Processing, or the point at which Relativity starts promoting documents with such as information as the user who tagged them and the source workspace.
- When you click Stop, Relativity immediately stops creating new errors for that job.
- When you click Stop on a run-now job, Relativity marks all errors associated with the current job history as Expired.
- When you click Stop on a retry job, Relativity marks all errors associated with the current job history and the previous job as Expired.
- You can start a scheduled job after you have already stopped it.
- The item counts on the Integration Points layout reflect all items promoted before the agent received the signal to stop the job.

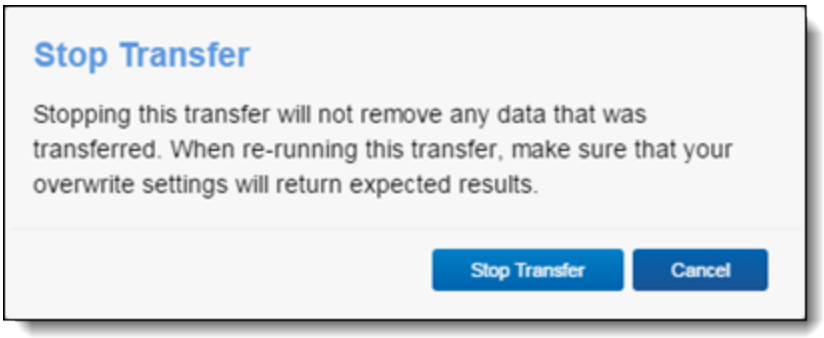
To stop an export job, follow the steps below.

1. Click **Stop** on the console.

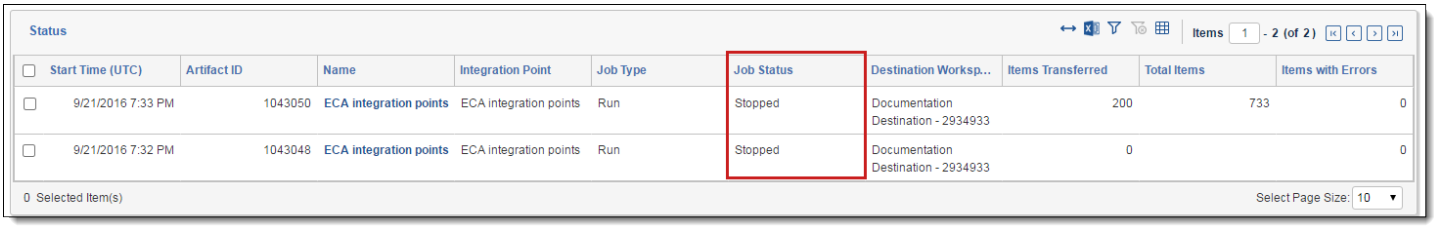


Relativity then informs you that you will not be removing any data by stopping the transfer and that you should check to make sure that the overwrite setting you previously entered is still appropriate for the re-run.

2. Click **Stop Transfer** to proceed.



Once Relativity stops the job, the Job Status field on the Status view reflects the stopped job.

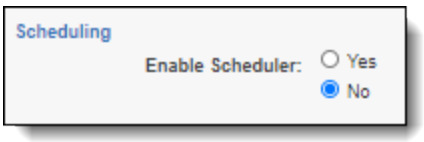


To re-start a stopped job, click **Run**. When you do this, Relativity begins to transfer data again from the beginning but does not remove any data already transferred.

5.7 Stopping (disabling) an Integration Point from promoting data

To stop, or disable, an integration point from promoting data, simply disable, or turn off, the scheduler option.

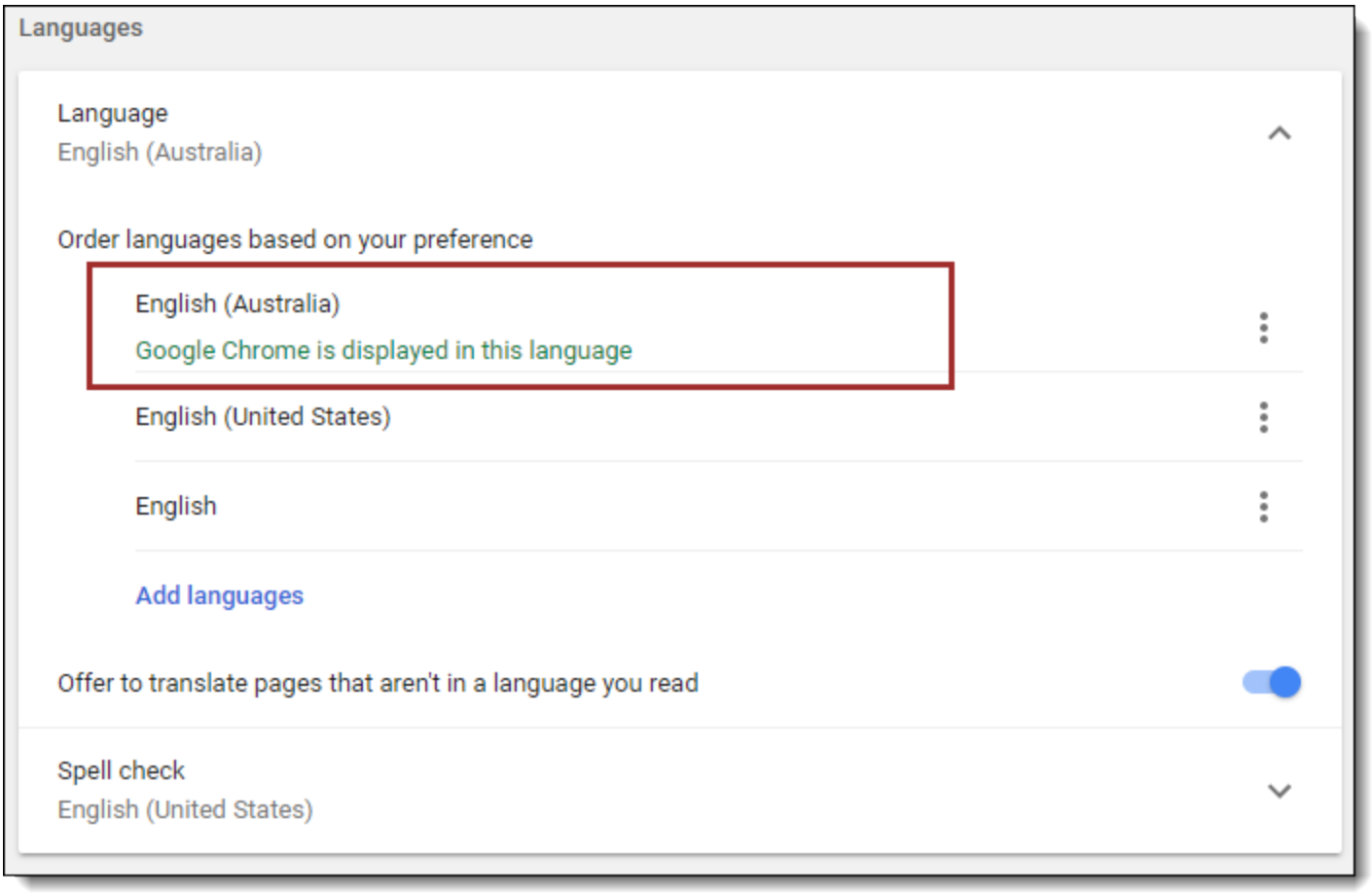
1. From the Integration Points landing page, click the Integration Point **Name** that you wish to disable.
2. Click **Edit**.
3. From the Import Scheduling section under Enable Scheduler, select **No**.This disables the scheduling mechanism for that integration point.



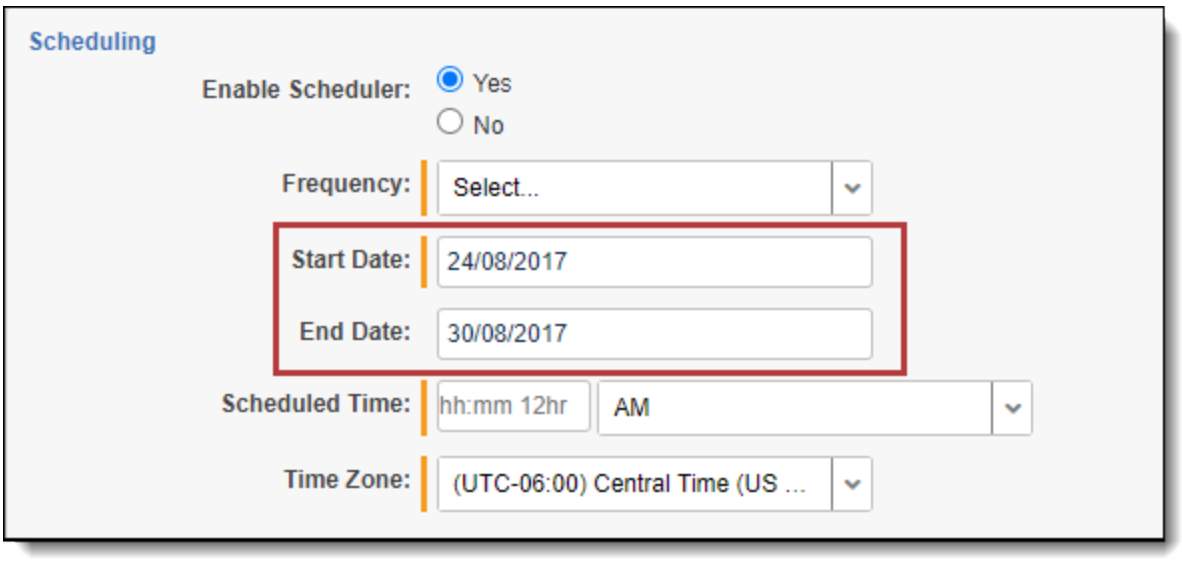
5.8 Scheduler date format considerations

The integration points scheduler accepts non-U.S. date formats to further accommodate, for example, users in Australia.

In this case, the default language in your browser settings is set to English (Australian) or any other language that would display a non-U.S. date format of Day/Month/Year instead of Month/Day/Year.



Relativity then properly displays the date when you select it for the Start and End Date fields in the Scheduling category.



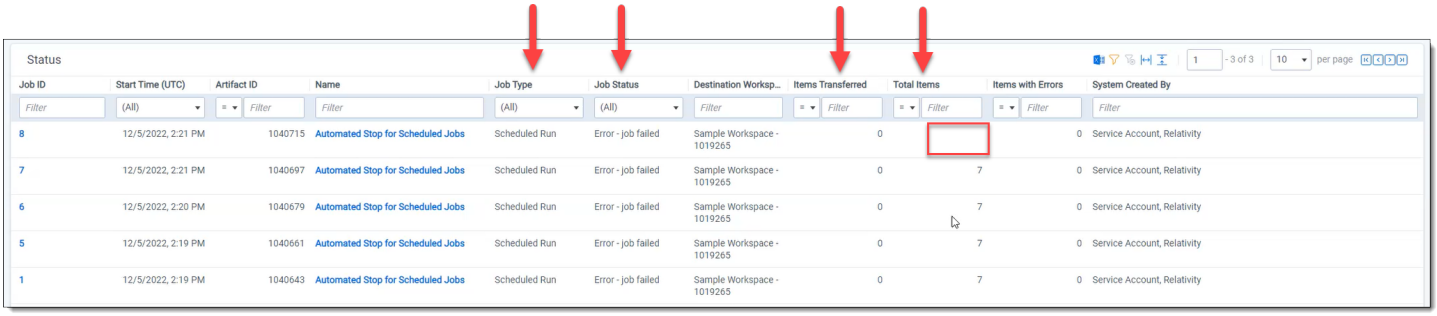
This date format will also appear anywhere else in Relativity where a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

5.9 Automatically stopping a scheduled job that repeatedly fails

In some cases, a scheduled job may fail each time it is executed, such as when a job needs reconfiguring, and it may take some time before you become aware of these failed attempts. To mitigate this situation, you can configure an instance setting which will specify the maximum number of consecutive failed attempts encountered before the job is automatically stopped. For example, you may want to stop the scheduled job after four consecutive failed attempts at running.

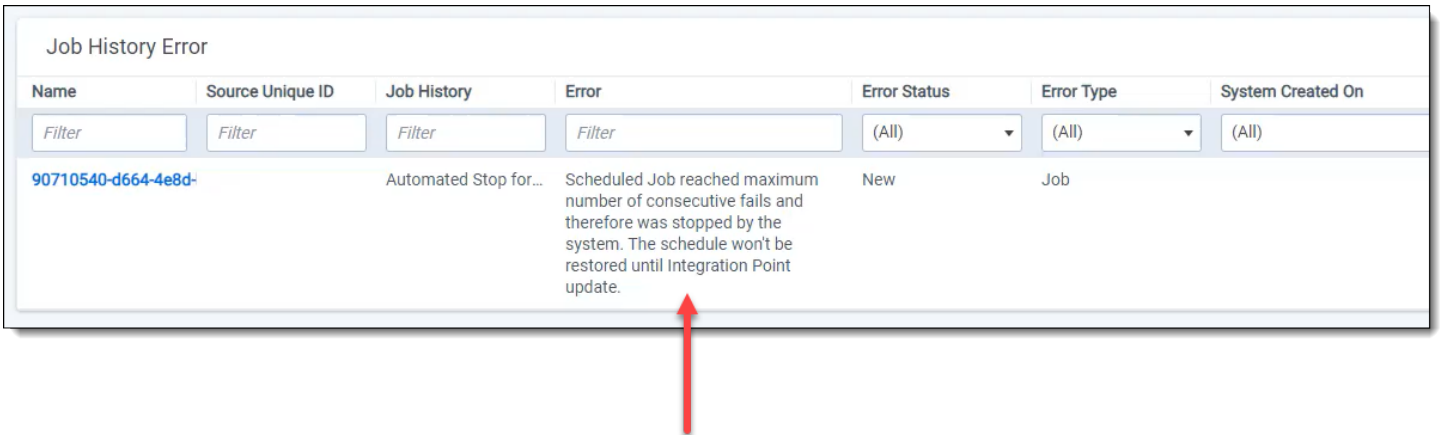
1. Navigate to the **Instance Settings** page.
2. Create a new instance setting with the following settings.
    - **Name**—enter **MaxFailedScheduledJobsCount**.
    - **Section**—enter **kcura.IntegrationPoints**.
    - **Value Type**—select **Integer 32-bit**.
    - **Value**—enter the number of consecutive failed attempts to be executed before the scheduled job is stopped.

The integration point's Scheduling tab will display the failed jobs with a Job Type of "Scheduled Run," Job Status of "Error - job failed," Items Transferred of "0," and Total Items based on the number of items in that job. The system will attempt one more run after the configured maximum number of consecutive failed attempts before it stops the scheduled job and the Total Items column will be blank.



The "Next Scheduled Runtime (UTC)" field on the Scheduling tab will be blank, letting you know that job is not scheduled to run again. You will need to correct the error(s) before it will run again as scheduled.

When you go to the Job History page to view the job, you will see the system-generated error description explaining why the scheduled job was stopped.



6 Transferring (promoting) data between workspaces

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

You can use Integration Points to transfer (promote) data from one Relativity workspace to another Relativity workspace. This can be thought of as a one-way sync process from a source workspace to a destination workspace and not a back and forth syncing process between them.

Once you have tagged documents for inclusion in or exclusion from the data you want to transfer to review, you can access Integration Points to start the job or jobs that will send those documents to the review workspace.

This topic provides details on Integration Points as it is used to transfer data between workspaces. For information, see the Integration Points GuideIntegration Points on page 5.

6.1 Considerations

For large data transfer workflows, we recommend configuring integration point jobs into batches. The following suggestions can be used when creating job batches:

- When using Tag Documents with Job Name option, the job document count should be no more than 500,000.
- When Tag Documents with Job Name is not selected, no limit on document count applies.
- The recommended number of fields to be mapped should not exceed 100. Additionally, it is best to map as few long text fields as possible.
- The following file types cannot be transferred to a Relativity workspace:
  - **Stored/Searchable PDFs**
  - **Native redactions**—the native file will be transferred without redactions.
  - **Produced natives and PDF**—the production flow allows the transfer of images only.

6.2 Exporting to a Relativity workspace

In addition to exporting to a CSV and load file, you have the option of transferring, or exporting, data from a source workspace to a destination workspace in Relativity. You can do this by selecting **Relativity** as the destination for the data that you intend to transfer and then selecting a specific workspace where you want that data to go. This is the most efficient way to move documents from one workspace to another. Since it's a one-step process, it does not require you to export and re-import your data.

6.2.1 Considerations

Consider the following when exporting data from a source to a destination workspace using Integration Points:

- You can transfer document objects and non-document object metadata to a destination workspace. The non-document object must already exist in the destination workspace for non-document object metadata to be transferred.
- You can move original images, native documents, or metadata. You are not required to have Integration Points installed on the destination workspace.

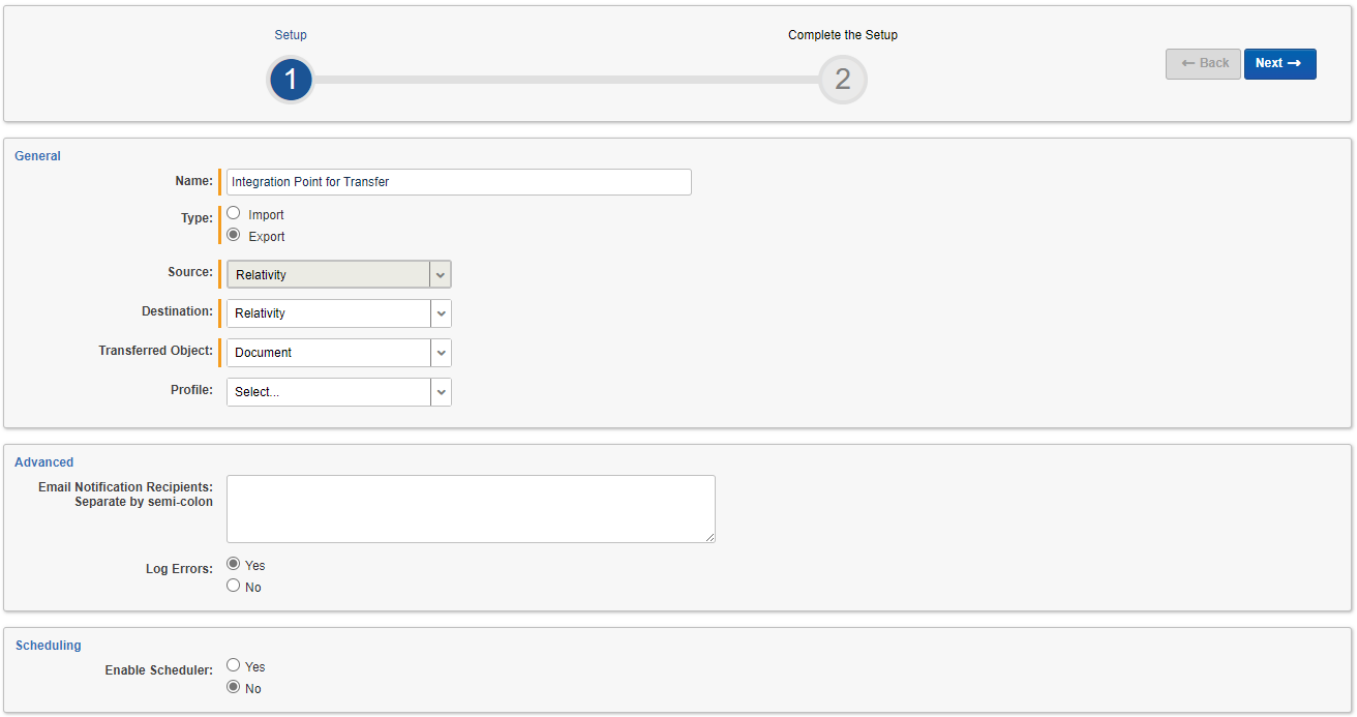
- The data transfer process supports transfer of non-document objects linked to the Relativity Applications installed in the destination workspace. For example, if you want to push entities object to another workspace, make sure that the proper application is installed there, for example Legal Hold. You need to have the Relativity Application permission in both the Workspace Security and Object Security sections set to View.
- The export process sorts documents and images by name, which is typically the Control Number. This process takes into account entire names, which means that for names with numbers, it is advised to preserve the number of digits in the names by filling with leading zeros. For example:
  - Test2_1, Test2_2, Test2_10 will be sorted as: Test2_1, Test2_10, Test_2
  - Test2_01, Test2_10, Test2_02 will be sorted as : Test2_01, Test2_02, Test2_10
- If transferred fields have associative objects, these objects need to be transferred first to ensure successful promotion of fields having references to them.
- The data transfer process will not transfer custom objects created by users in a workspace.
- The data transfer process cannot transfer complex objects that have relationships to other objects, such as Search Terms Report (STR), structured analytics sets, and Integration Points profiles, because related objects' ArtifactIDs may be different in the source and destination workspaces.
- When the **Copy Images** radio button is selected, the field mapping section is disabled because only the control number is required and available in this scenario. If you want to transfer other field metadata, you must create a new integration point without choosing to copy images.
- Integration Points uses the following delimiters to configure the Import API for the destination workspace. Other delimiters typically configured with the Import API are not utilized:
  - Multi-value delimiter: ASCII 029
  - Nested-value delimiter: ASCII 030

6.2.2 Setup

To create an integration point specifically for exporting a workspace, follow the steps below:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.

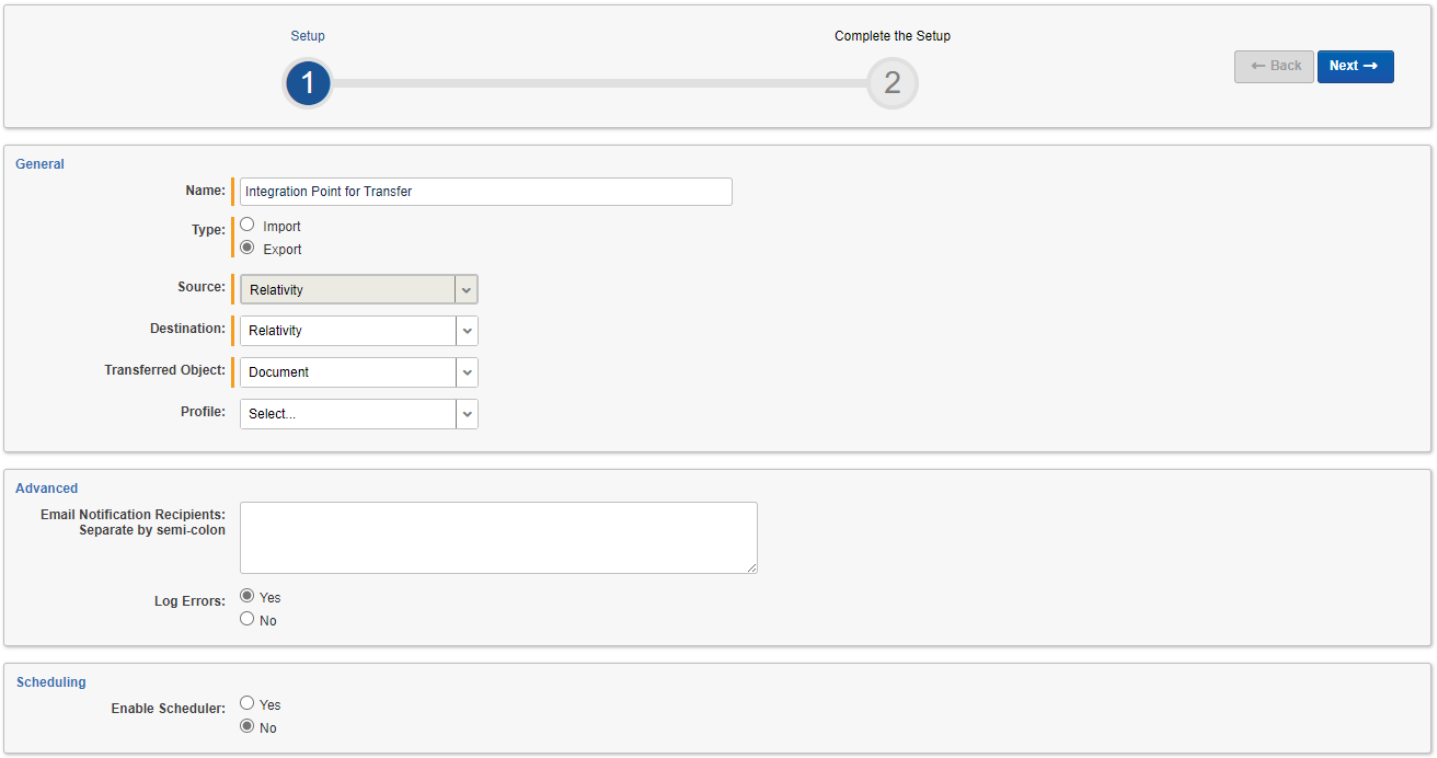
3. Complete the fields in the **Setup** layout. For more information, see Setup fields below.



4. Click **Next** to advance to the **Connect to Source** layout.

6.2.2.1 Setup fields

Complete the following fields in the **Setup** layout:



- **Name**—the name of your integration for reference purposes.
- **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.

- **Source**—this is automatically set to **Relativity** since you are exporting data out of a Relativity workspace.
- **Destination**—select **Relativity**.
- **Transferred Object**—select the available Document or non-document object meta data you want to transfer to the destination workspace. The non-document object must already exist in the destination workspace. The data transfer process will not transfer custom objects created by users in a workspace. Refer to the Notes above for additional information.

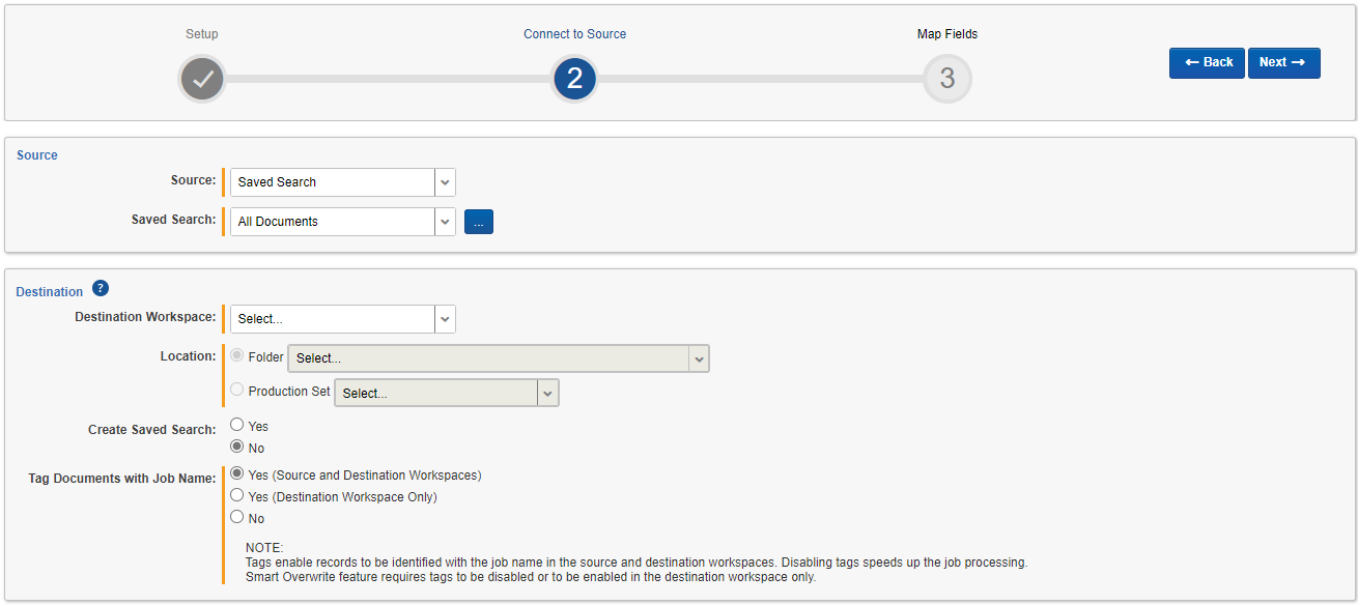
  Note: You will need to create a new integration point for each object type that you want to export to the destination workspace.

- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the **Connect to Source** layout, as well as field mappings. If no profiles exist in the workspace, you do not have the option of selecting them. To apply a profile that you have already created, select it from the drop-down list. For more information on profiles, see Integration Points profiles on page 10.
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons to separate email addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item-level errors.
  - If you select **Yes**, each job also logs any item-level errors.
  - If you select **No**, Relativity does not log these item-level errors.
    Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
- **Frequency**—the interval at which Relativity runs this integration point.
  - **Daily**—select this option to transfer data once every day.
  - **Weekly**—select this option to transfer data on a weekly basis. You can specify how often in the **Reoccur** field, in which you will provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the data transfer will take place by checking any of the days of the week listed.
  - **Monthly**—select the day of the month that you want this integration point to transfer data once every month.
  - **Reoccur**—enter the number of month(s) in which this integration point repeatedly transfer data.
  - **Send On**:
    - **Day __ the month**—select the day of the month that you want this integration point to transfer data.
    - **The __ of the Month**—select this option for this integration point to transfer data on the chosen day of every month. For example, "The **Second Friday** of the month."
- **Start Date**—the date that you want Integration Points to start transferring the data.
- **End Date**—(Optional) the date that you want Integration Points to stop transferring the data. Leaving the End Date blank causes the integration point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point transfers data. This time is local to your PC, not to the server.

6.2.3 Connect to Source

Continue to create your import integration point by connecting Relativity to the data source by following the steps below:

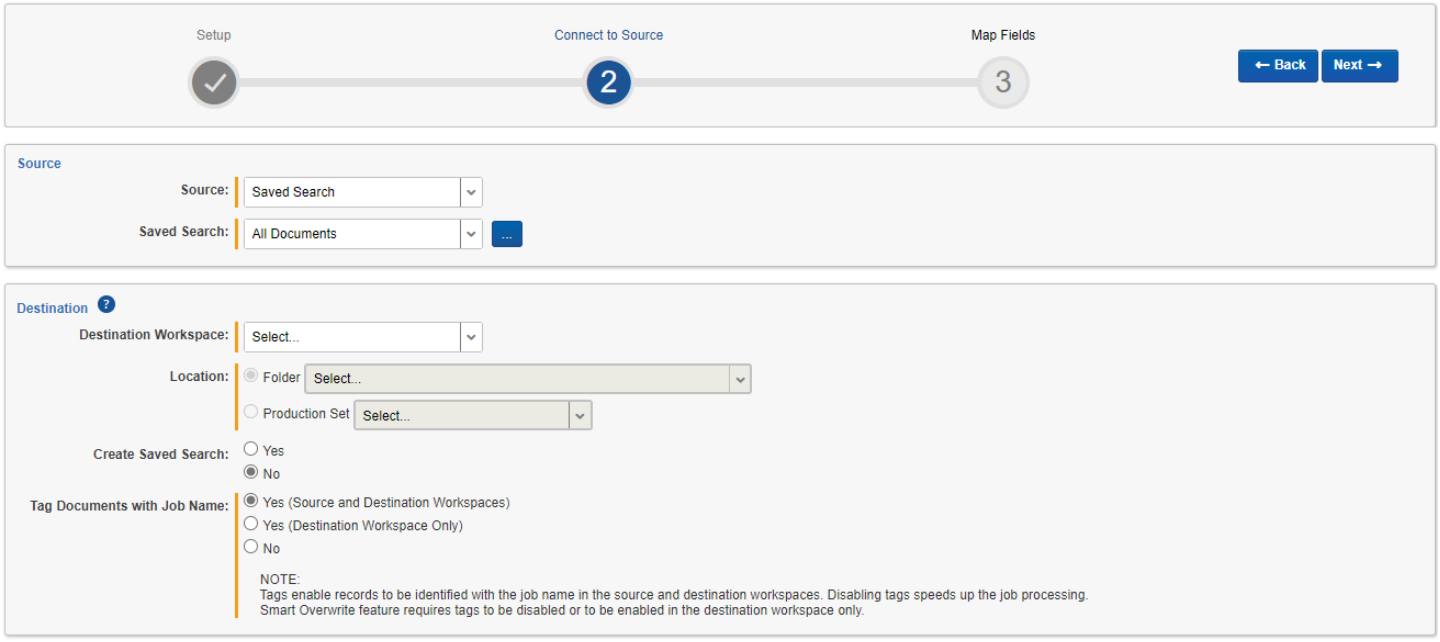
1. Complete the fields in the **Connect to Source** layout. For more information, see Connect to Source fields below.



2. Click **Next** to advance to the **Map Fields** layout.

6.2.3.1 Connect to Source fields

Complete the following fields in the **Connect to Source** layout:



Source—select **Document** as the transferred object during setup, then select **Saved Search** or **Production** from the drop-down list. If you select any other object as the transferred object during setup, this is automatically set to View.

- **Saved Search/Production/View**—depending on the selected Transferred Object, one of the following fields displays:
  - **Saved Search**—select an existing saved search to use from the drop-down list or click the ellipsis button for an alternative way to select a saved search.
  - **Production Set**—select an existing production set to use from the drop-down list.
  - **View**—select an existing view to use from the drop-down list.
- **Destination Workspace**—select an existing workspace to export your saved search or production to.

  Note: Relativity will validate whether the selected object is available in the destination workspace and transfer only objects linked to Relativity Applications installed in the destination workspace. If the selected object is not available in the destination workspace, an error message will appear.

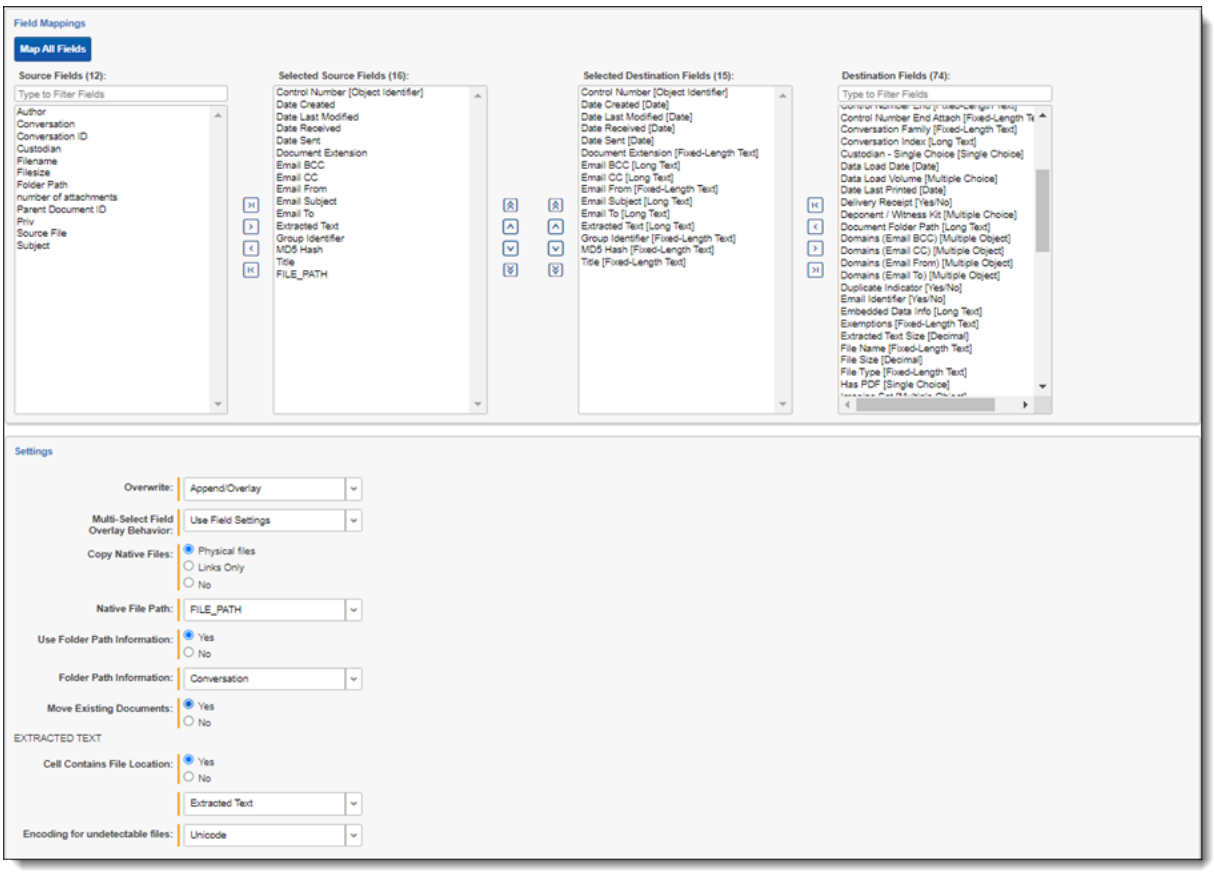
- **Location**—select a folder or production set as the destination location.
  - **Folder**—select the drop-down menu to expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you have selected Folder.

    Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to create the integration point, these fields are updated to reflect the newly selected source.

  - **Production Set**—select a production set to export the data to. Click the plus sign to create a new production set. For successful operation, transfer Production Set with Append/Overlay mode.
- **Create Saved Search**—select **Yes** to create a saved search in the destination workspace. This saved search's name will take the name given to the integration point. This choice is enabled only if Yes is selected for the Tag Documents with Job Name field.
- **Tag Documents with Job Name**—select one of the following options below. See Considerations on page 90 for document count considerations:
  - **Yes (Source and Destination Workspaces)**—to tag all documents in the scope of the job with a unique ID in both the source and destination workspaces, which allows you to easily identify these documents in both workspaces. This is the default option.
  - **Yes (Destination Workspace Only)**—to tag all documents in the scope of the job with a unique ID in the destination workspace only, which allows you to easily identify these documents in the target workspace.
  - **No**—to not tag documents with a unique ID in either workspace.
  - The following fields are populated when you select **Yes**:
    - **Relativity Destination Case**—the workspace ID where the documents were transferred to.
    - **Relativity Source Case**—the workspace ID where the documents were transferred from.
    - **Relativity Source Job**—Integration Points job ID that moved the document.

6.2.4 Map Fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields by following the steps below:



1. Map fields in the **Field Mappings** wizard. For more information, see Field Mappings below.
2. Complete the fields in the **Settings** category. For more information, see Settings fields on the next page.
3. Click **Save** to save this integration point with these export settings.

6.2.4.1 Field Mappings

In the **Field Mappings** wizard, you have the following options for mapping fields:

- Use the Shift+click and Ctrl+click method to select multiple fields at a time.
- Use the text search boxes above the Source and Destination lists to find a particular field.
- Use the single and double arrows or double-click a field to move selected fields between columns.
- Use the horizontal scroll bar in each column as needed to fully view long field names.
- Each column displays the total number of fields available in that column. This allows you to quickly compare the number of mapped fields to ensure they match. If they do not match, an error will display when you attempt to save the Integration Point.
- The field names in the Destination column include the type of each field listed.
- Click the **Map All Fields** button between the Source and Destination columns to automatically map all fields with matching names, except single or multiple object fields. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity also tries to find name matches between these Catalog Fields.
    - The Field Mappings process excludes certain fields that are used internally by the Integration Points application. The following fields are excluded from the Source and Destination lists: Relativity Source Case, Relativity Source Job, Relativity Destination Case, ErroredDocuments, Job History, and Document.ProcessingFileID.

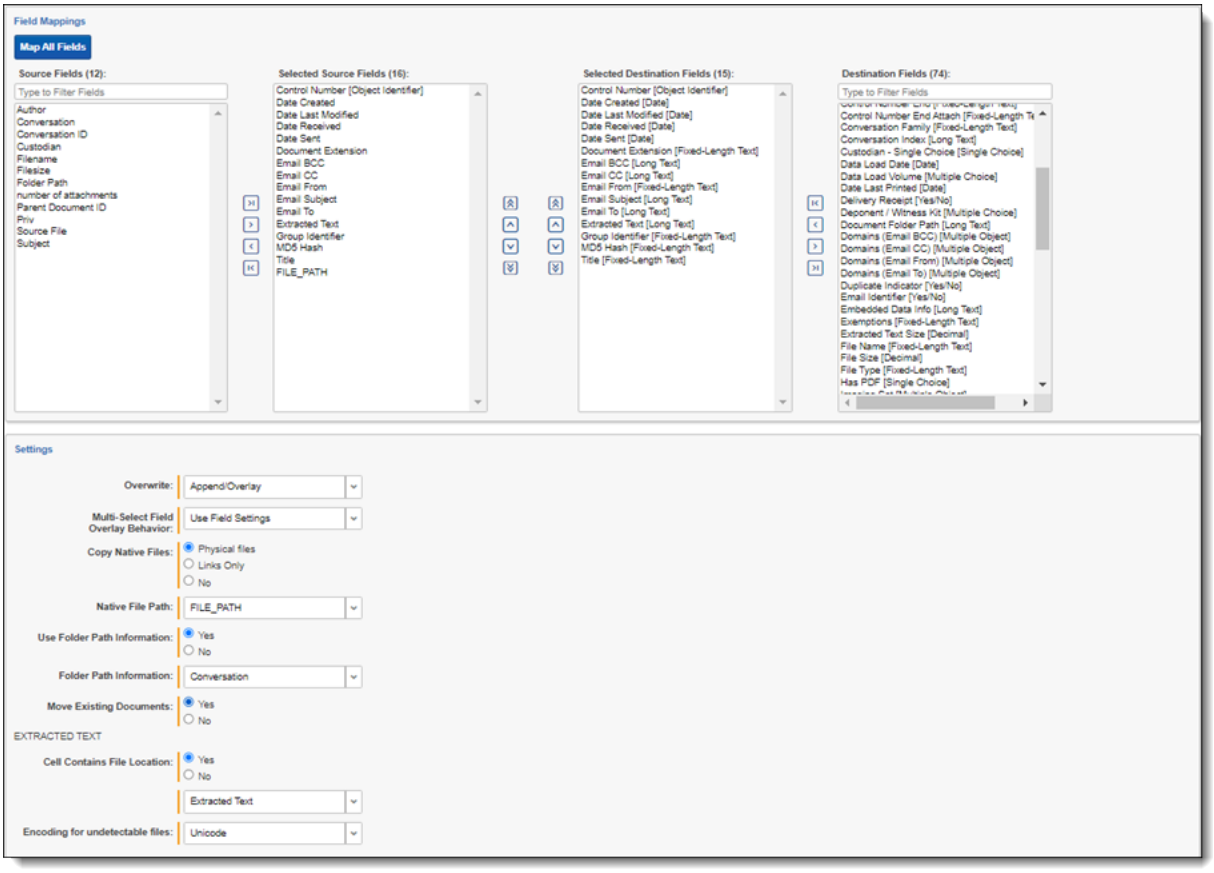
- If the WebAPIPath instance setting in the kCur.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list will not be able to display any attributes and will be empty. As a result, you will not be able to map fields.
- You do not need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.

- Click the **Map Saved Search** button between the Source and Destination columns to automatically map fields that were configured in the Saved Search, which was selected as a data source on the previous screen. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity also tries to find name matches between these Catalog Fields.

Note: The Map Saved Search functionality only supports searches created with a Keyword Search. Other search conditions, such as dtSearch and Analytics Indexes, are not yet supported for this functionality.

6.2.4.2 Settings fields

Complete the following fields in the **Settings** category:



- **Overwrite**—determines how the system overwrites records once you transfer data to the review workspace.
  - **Append Only**—transfer only new records into the review workspace.

    - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. When you select this option, you must complete the Multi-Select Field Overlay Behavior field described below.
    - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this option, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
    - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
    - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Images**—determine whether you want to copy images to the destination workspace:
    - **Yes**—click if you want to copy images to your destination workspace. Then select options in the *Image Precedence* and *Copy Files to Repository* fields.
        - When you click *Yes* to copy images, it removes the option to include natives in your job.
        - To get transfer images and natives to your other workspace, you must run two separate Integration points.
            - The first job where you select images.
            - The second job where you select natives. The second job you will just need to select Append/Overlay.
        - **No**—click if you do not want to copy images to the destination workspace. Then select options in Copy Native Files and Use Folder Path Information fields.
- **Image Precedence**—this field appears when Yes is selected for Copy Images. Select **Original Images** or **Produced Images** to copy to the destination workspace.
- **Copy Files to Repository**—determine if you want to copy physical image files to the destination workspace:
    - **Yes**—click if you want to copy physical image files to the destination workspace.
    - **No**—click if you want to add reference links in the destination workspace directing to images located in the source workspace. Links to the images will be accessible in the destination workspace Viewer.
- **Production Precedence**—this field displays when Produced Images is selected for Image Precedence. Use the pop-up screen to select and order the productions, and click *OK* on the screen to save.
- **Include Original Images If Not Produced**—this field displays when Produced Images is selected for Image Precedence. Select this checkbox to include the original image.
- **Copy Native Files**—if No was selected for Copy Images, determine how to copy native files to the destination workspaces by selecting one of these radio buttons:

- **Physical files**—select to copy any physical native files from the source workspace to the destination workspace.
- **Links Only**—select to add only reference links in the destination workspace that direct back to the source workspace documents. No physical files will be copied to the destination workspace, but native files will be accessible in the destination workspace Viewer.

Note: We do not recommend overlaying documents' native files with Links Only option from Review workspace back to Repository workspace. This action may lead to overlaying the original native file with its link, that has been previously sent to Review workspace. And that will result in deleting the native file and the data loss. When choosing this option to transfer documents by only using links from repository to review workspace, be aware that the links to the transferred documents will be broken in the review workspace if you delete the native files in the repository workspace or if you delete or archive the repository workspace itself. In this situation, if you wanted to maintain the files in the review workspace, you first need to transfer the physical files to that workspace before deleting them from the repository workspace or before deleting or archiving the repository workspace. For details on transferring subsets of data, see the Admin Guide.

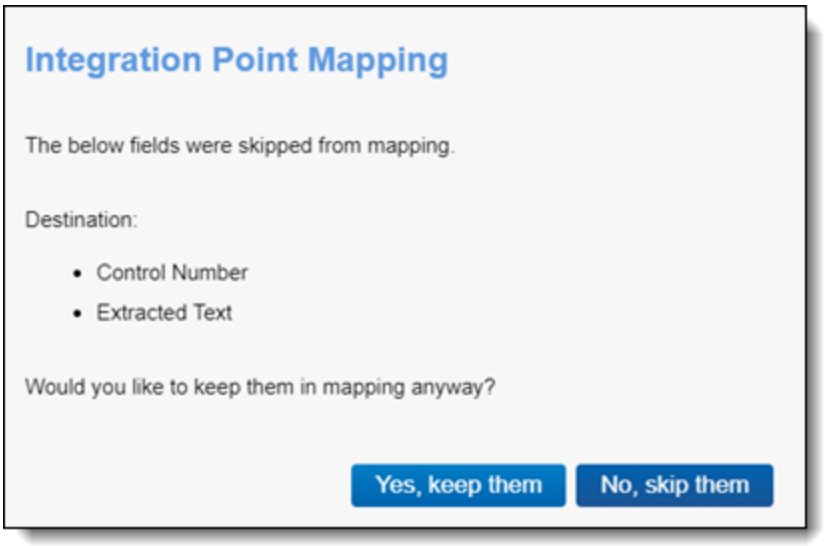
Note: Be aware that when a non-administrator user copies native files by selecting the Links Only option, the System Created by column on the Job History tab will list the system administrator's name instead of the non-administrator user's name.

- **No**—select to not create additional copies of your native files. No physical native files or links will be pushed to the destination workspace. You will not be able to look at native files in the Viewer. Only metadata, such as extracted text or coding decisions, will be pushed. For example, if you have a document with native files and coding decisions, and you select the No option, only metadata (the coding decisions) will be transferred to the destination workspace. Refer to additional notes below regarding this choice:
  - Doing this maintains a single copy of that data file no matter how many times you use the document in your workspace.
  - You have the option of selecting No for an initial run of an integration point and then Yes for a subsequent run. Doing this saves you time on the initial job while then retaining copies of the native files on the final job.
  - The benefit of selecting No for this field is that you save on storage and speed.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you transfer to the review workspace.
  - **No**—select if you don't want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the transfer destination, and you create no new folders in the destination workspace.
  - **Read From Field** or **Read From Folder Tree**—select to use a metadata field to build the folder structure for the documents that you transfer to the review workspace.
  - **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you transfer to the review workspace.
    - You have the option of creating folders or re-foldering documents when you select Append/Overlay for the Overwrite field.
    - You have the option of re-foldering documents for the Overwrite field through the Move Existing Documents field.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in

which you want to add new data to the destination workspace while overlaying existing data.

- Select **No** if you don't want to re-folder existing documents.
- Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder. Now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's sub-folder, so you would select Yes.

During the mapping process, Relativity validates whether the selected objects are available in the destination workspace in the final step of the wizard. When fields cannot be mapped from the Source to the Destination, a pop-up modal displays them. You can either choose to keep the fields in the Source column or skip them and remove them.



Another solution that Integration Points data transfer provides is automatically remapping fields when the destination workspace is changed. When you change the destination workspace in either the integration point or integration point profile, fields can vary between the source and destination workspace. When the destination workspace is changed, the new fields in the workspace are automatically mapped.

The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. They are mapped so that the integration points job will not fail. This means that if the source workspace fields cannot match to the new destination workspace fields, those unmatched fields are presented at the end of the mappings list for easy identification. Relativity also informs the you that the original source fields from the profile were mapped with corresponding fields from the destination workspace. The message will be similar to this, "We restored the fields mapping as destination workspace has changed."

6.3 Mapping saved searches

The **Map Saved Searches** button automatically maps the fields from the saved search. It also maps the object identifier fields, even when such field is not selected in the saved search. If any unsupported fields are manually mapped, clicking the **Save** button displays a pop-up modal stating that the job might fail.

Once Relativity saves the integration point, you will be able to run it and export the data based on the settings you specified. See Running the export job on page 84 for details.

6.4 Working with transferred documents

To view the documents you transferred to the destination workspace, for which Tag Documents with Job Name option was enabled:

1. Navigate to the destination workspace.
2. Click the **Documents** tab and make sure you are on the **Folders** browser.
3. Note the following fields on Documents view (if these fields are not yet added to the view, edit it and add them in the **Fields** tab):
    - **Relativity Source Case**—the name of the workspace from which the tagged documents were transferred to the destination workspace.
    - **Relativity Source Job**—the name of the Integration Point job that you used to transfer the tagged documents to the destination workspace.
4. If option Create Saved Search had been selected for the transferred documents, you can also view them in the created saved search. To do so:
    I. Navigate to the **Saved Search** browser.
    II. Locate Integration Points folder and expand it.
    III. Click on the saved search with the name of the Integration Point job that transferred the documents.

You can now review these documents and apply coding decisions for responsiveness and/or issues designation.

6.4.1 Reusing coding decisions

You can re-use the coding decisions you made on reviewed documents and transfer them back into the source workspace through another Integration Point. For example, you could run another transfer job to conduct a privilege overlay on documents in the source workspace.

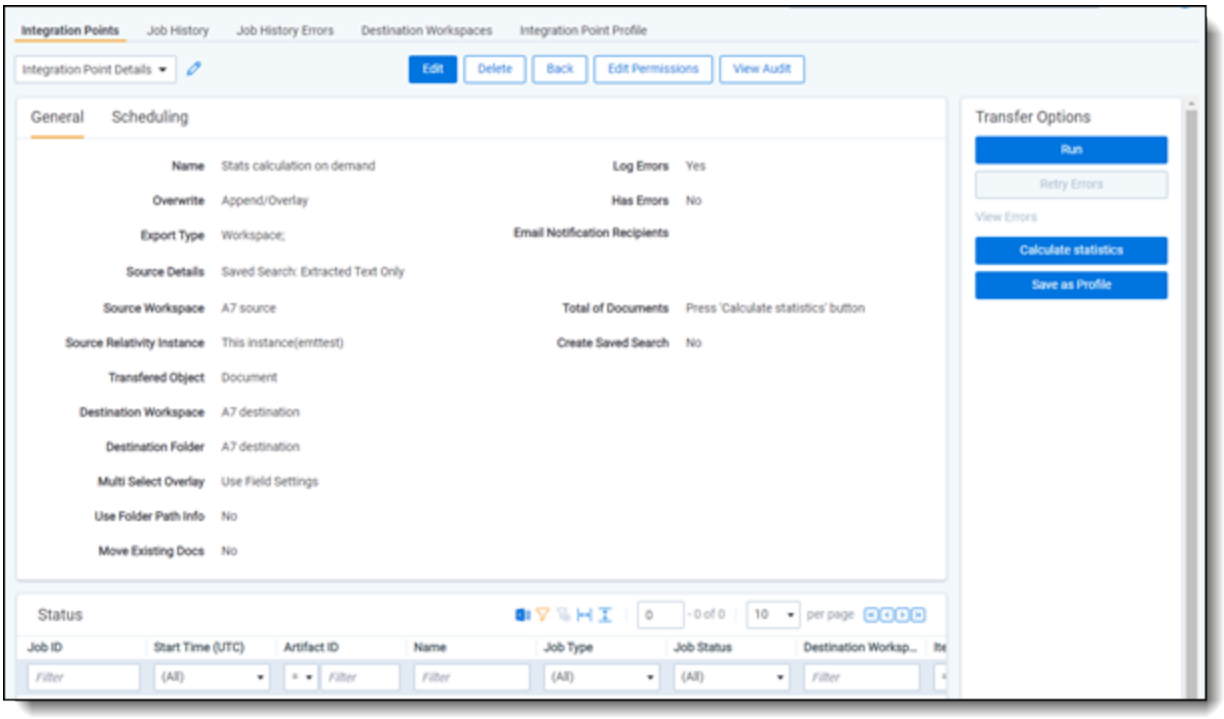
To do this, follow the steps below:

1. Select the saved search you created to transfer documents back to the source workspace.
2. Navigate to the **Integration Points** tab.
3. Create a new integration point that specifies the following values, which differ from those you entered for the transfer job you ran previously:
    - **Destination Workspace**—select the original source workspace, specifically the workspace from which you previously transferred documents to the review workspace.
    - **Saved Search**—select the saved search you created to transfer documents back to the source workspace.
    - **Field Mappings**—map only **Control Number (Object Identifier)** and **Privilege Designation**.
    - **Overwrite**—select **Overlay Only**.
4. Click **Run**.

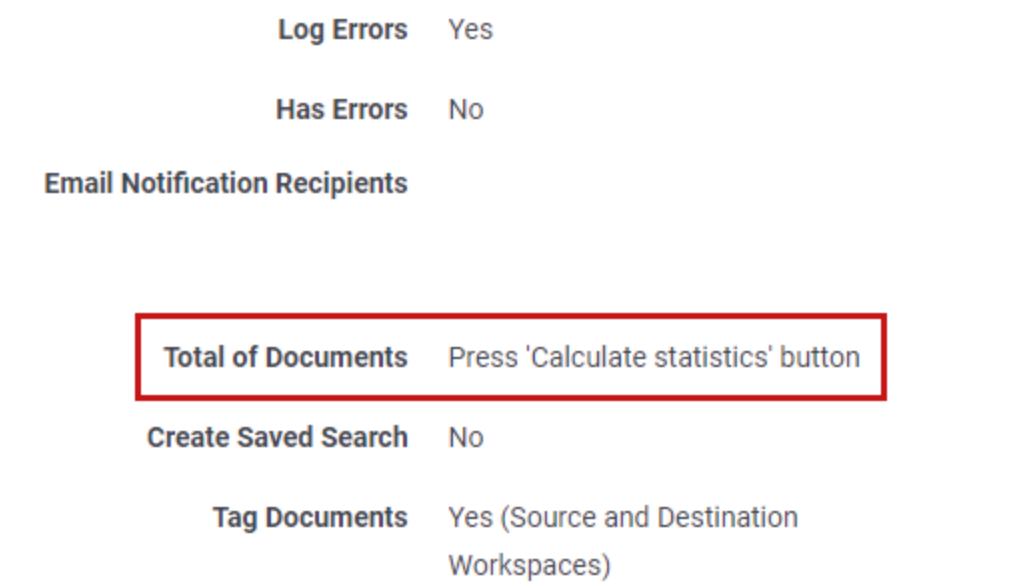
6.5 Calculating integration point job statistics on-demand

You can calculate the number of documents, as well as images and natives if applicable, to be transferred in the scope of a particular Integration Point.

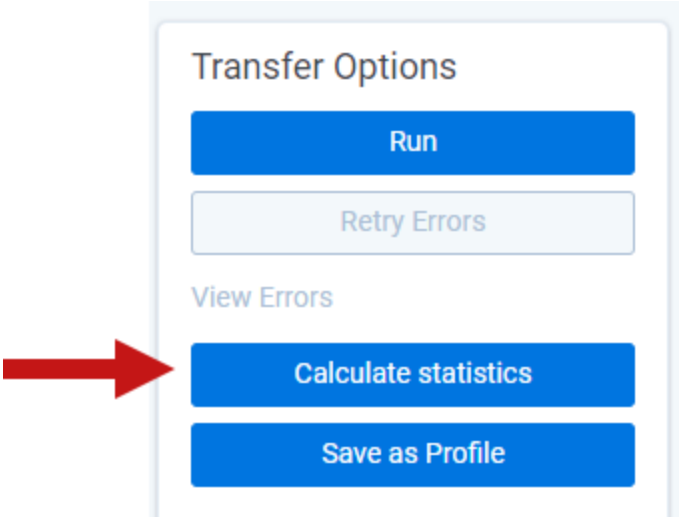
1. Navigate to the **General** tab of **Integration Points > Integration Points Details** for a particular integration point job.



Note: Before the first calculation for this integration point, you will see the "Press 'Calculate statistics' button" message in the Total of Documents field.

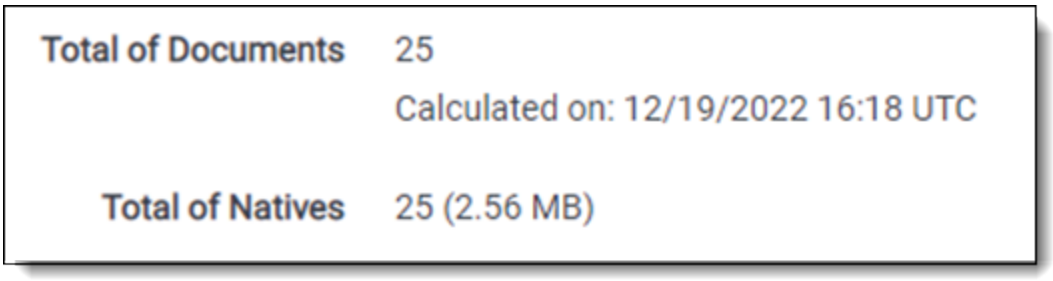


2. Click the **Calculate statistics** button under Transfer Options in the right-hand panel.



A message box displays indicating that this action will launch the calculation of Saved Search or Production content, depending on the chosen Integration Point, and that this operation can be time consuming, depending on the size of the content. The statistics calculation will run in the background so you can still use other Transfer Options or leave this page and return to it for the results later.

Calculation results appear on the details page and depend on Integration Point content. The total number of documents with a date/time mark of the last calculation will display. Depending on the transferred content, the total number and size of images or natives may also display.



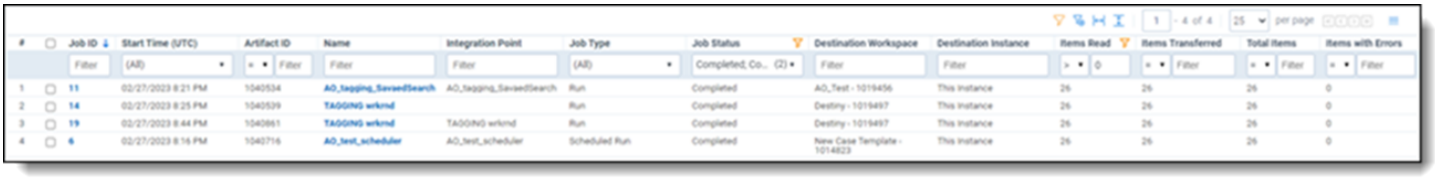
7 Monitoring job history and errors

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

After you create an integration point and initiate the import process, you can monitor the job status on the Job History tab and resolve errors on the Job History Errors tab.

7.1 Job History

This tab lists an entry for each integration point job, and also provides you with the ability to view additional details for a specific job.



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

- **Start Time (UTC)**—the date and time that a job started running in Coordinated Universal Time (UTC).
- **Artifact ID**—the artifact ID of the workspace.
- **Name**—the name for a specific job run by the integration point.
- **Integration Point**—the name of the integration point used to run the job.
- **Job Status**—the current status of an integration point job. The following job statuses are available:
  - **[blank]**—the job has not started or was not run.
  - **Pending**—the job has been submitted but an agent hasn't picked it up, so the import process hasn't started.
  - **Suspending**—the system is performing the application update. The job prepares for being suspended, completing the current task.
  - **Suspended**—the system is performing the application update. The job has been suspended, and waits for the Integration Points agent to pick it up.
  - **Validation**—an agent is validating the job to make sure it has the required settings, such as access to the source and destination objects (saved searches, workspaces, etc.). If validation fails, the status changes to "Validation failed," and Relativity logs an error. If the validation succeeds, the job moves on to a status of "Processing."
  - **Validation failed**—the job validation has failed, resulting in an error, the details of which are saved in the Job History Errors tab.
  - **Processing**—the job is currently running.
  - **Error - Job Failed**—a job-level error occurred and the import wasn't completed. The integration point may have been able to import some of the records before the error occurred.

- **Completed with Errors**—the import job completed but at least one item-level error occurred. If you set the Log Errors field to Yes for the integration point, you can view the item-level errors in the section called Job History Errors on the Job Details layout. See Viewing job history details below.

  Notes: When transferring custodians and associating them to managers, errors can occur. If transferring custodians and the manager isn't associated with a manager, the custodian transfer is completed successfully. It will show up as Completed with Errors even though the Items Transferred field and Total Items field will match, while the Items with Errors field states zero errors. This is because the custodian has been imported correctly, but the manager wasn't associated correctly.

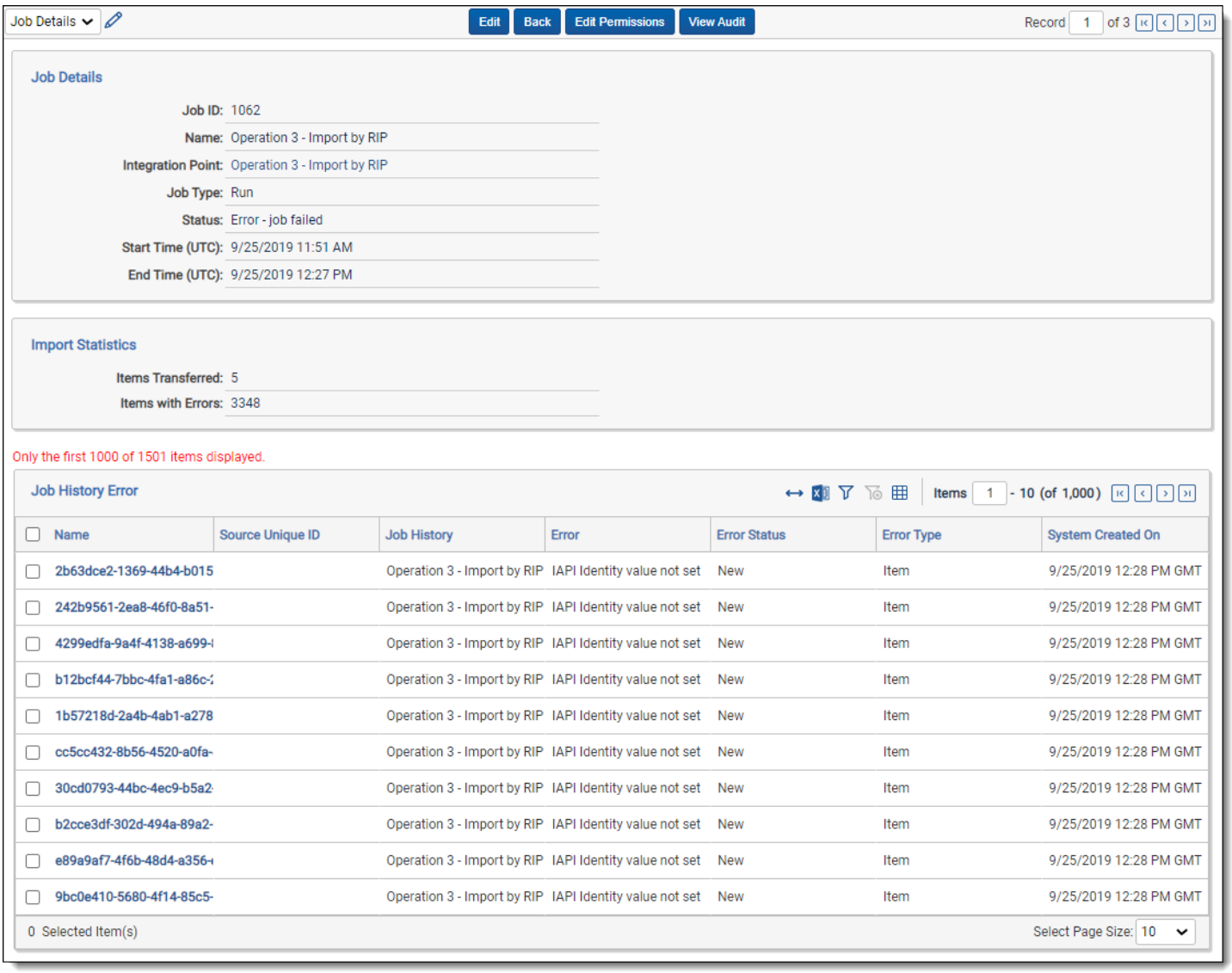
- **Completed**—the import job completed without any item-level errors.

- **Destination Workspace**—the workspace specified as the destination for the transferred files.
- **Items Read**—the number of records successfully read from the job source and passed for transferring.
- **Items Transferred**—the number of records successfully transferred when the job ran.
- **Total Items**—the total number of items originally designated to be transferred, including those that ended up having errors.
- **Items with Errors**—the number of records that the integration point failed to import due to item-level errors.

7.1.1 Viewing job history details

To view additional history information, click the name of a specific job listed on the Job History tab. The Job Details layout displays basic job information, import statistics, and a detailed list of errors.

The Job History Error section always logs job-level errors. If you set the Log Errors field to Yes, then it also logs item-level errors. For more information on setting the Log Errors field, see Importing data through Integration Points on page 15.

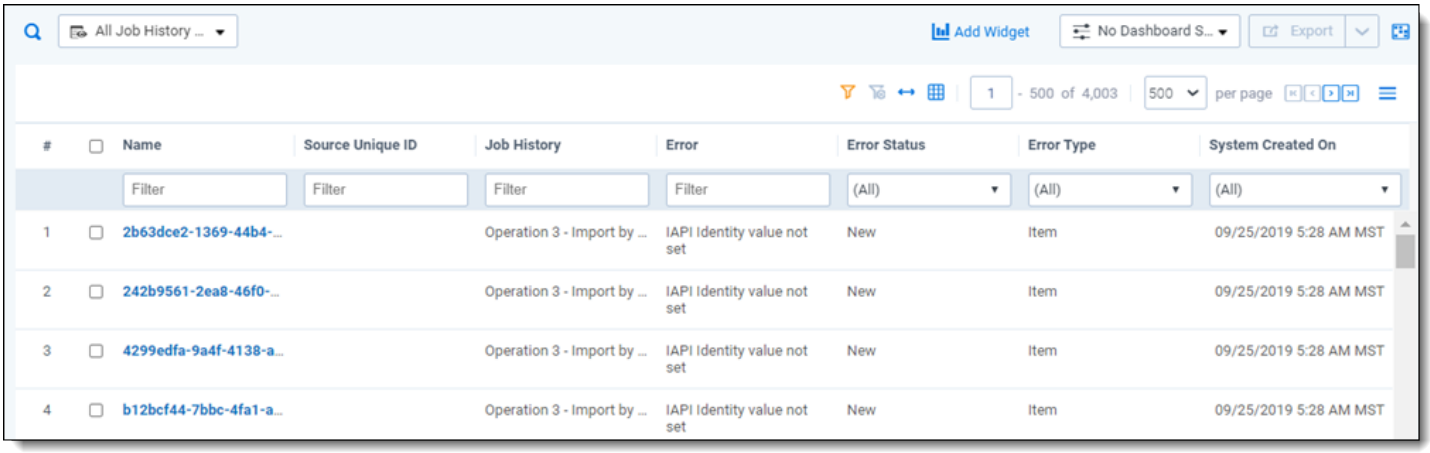


The Job Details layout includes many of the same fields displayed on the Job History tab. The following list includes the additional fields displayed in this layout:

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

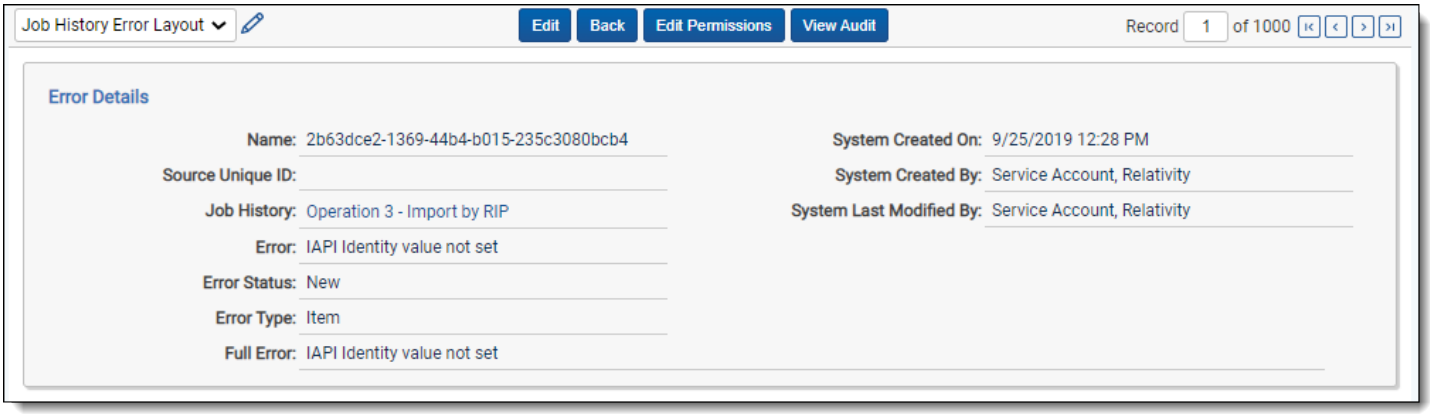
7.2 Job History Errors

In the Job History Errors tab, you can use the condition lists at the top of the view to find errors based on any error-related metadata fields, such as Artifact ID, Error, Error Status, Error Type, JobHistory, Name, Source Unique ID, Stack Trace, System Created By, System Created On, System Last Modified On, and Timestamp (UTC).



Once you specify your conditions, you can search for the targeted errors by clicking **Search** on the right side of the condition lists.

You can then open any of the individuals errors returned in the list by clicking the **Name** value.



The Job History Error Layout provides the following fields:

- **Name**—the system-generated name of the error.
- **Source Unique ID**—the identifier of the item in which the error occurred.
- **Job History**—the name of the integration point containing the file in which the error occurred.
- **Error**—the error message.
- **Error Status**—the current state of the error. You'll see any of the following values for the status field:
  - **New**—the error is new and no action has been taken on it yet.
  - **Expired**—the state assigned to an item level error in either of the following scenarios:
    - You received an item-level error on a job, you didn't retry the error, and the job ran on a schedule, meaning the Enable Scheduler field is set to Yes on the integration point.
    - You received an item-level or a job-level error, you didn't retry the error, and you click Run Now on the integration point, or it is a scheduled job.
  - **In Progress**—the error is currently in the process of being retried.
  - **Retried**—the item level error in a job has been retried, meaning you clicked Retry Errors on the integration point and the retry job is complete.
- **Error Type**—an indicator of whether the error is item or job-level.

- **Full Error**—the error message with details, including a stack trace of the error, when available.
- **System Created On**—the date and time at which the error was created by the agent during the integration point job.
- **System Created By**—the agent that created the error during the integration point job.
- **System Last Modified By**—the agent that last updated the status value of the error.

With the information provided in the Job History Errors Layout, you can identify those files on which errors occurred. You can then access those files to manually address the causes of those errors. From there, you can return to the integration points console and retry the errors.

7.2.1 Item-level errors versus job-level errors

Note the following differences in the way Relativity handles item-level and job-level errors.

Relativity handles a mix of item-level and job-level errors in the following way:

- When you click **Run** on an integration point that contains item- and job-level errors, the entire job is re-run.
- When you click **Retry Errors** on an integration point that contains item- and job-level errors, the entire job is re-run.

Relativity handles item-level errors in the following way:

- When you click **Run**, the entire job is re-run.
- When you click **Retry Errors**, a retry job starts, including only those documents that caused errors.

Relativity handles job-level errors in the following way:

- It registers only one job-level error for an integration point.
- When you click **Run**, the entire job is re-run.
- The **Retry Errors**button is not available.

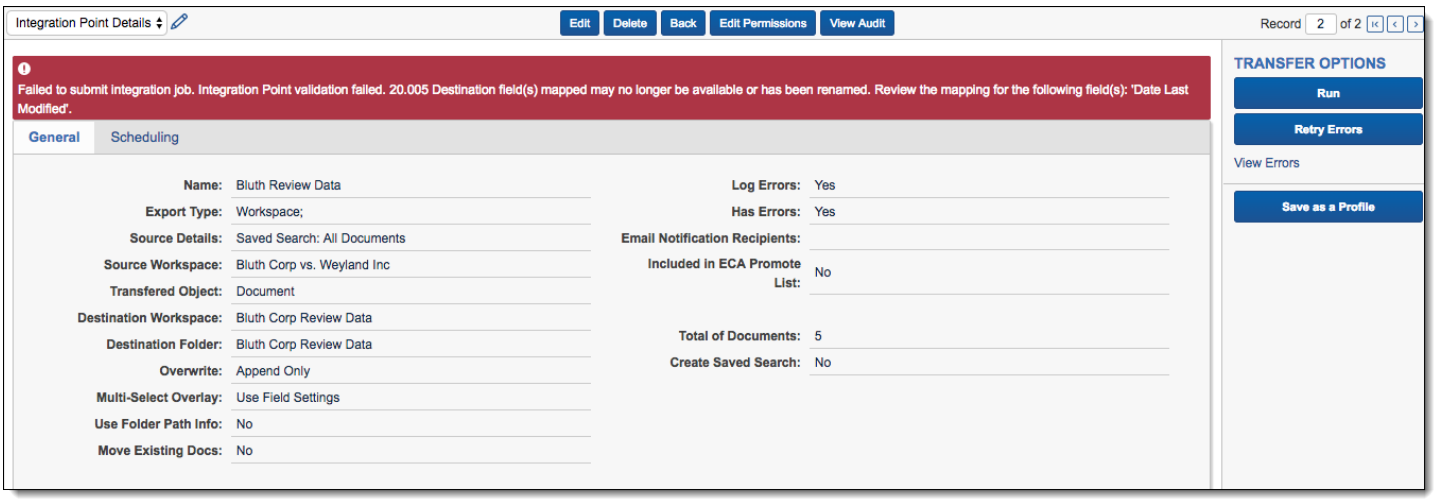
Clicking the **Retry Errors** button starts a new job only for documents that caused errors in the previous run. If you edit an integration point settings before running the retry job, they will be applied to the retry job (except data source changes).

You can change, for example, Fields Mapping or Overwrite settings to allow the documents that caused errors to be transferred successfully.

Note: When you run Retry Errors for a job configured to copy physical files like natives or images in Append mode, the retry job mode is automatically set to Append/Overlay.
This intended behavior is to ensure consistency between copied metadata and native and image files. It may happen that during a job that has failed, only part of a given document (either metadata or files) has been transferred successfully. In such case, Append/Overlay mode allows transferring all the document data.
If you want to have the documents that caused errors transferred in other mode, you need to edit the integration point before running the Retry Errors job.

7.3 Troubleshooting job history errors

Relativity provides informative and actionable error messages when you attempt to save and run an integration point in any of the following situations:



- The destination workspace is missing.
- The destination field is missing.
- You do not have permissions to a saved search, production, or destination workspace.
- The destination field has missing child object data.
- The production is missing from the destination workspace.

The following table provides some of the errors you could encounter when attempting to run an Integration Points job, along with information on how to resolve them:

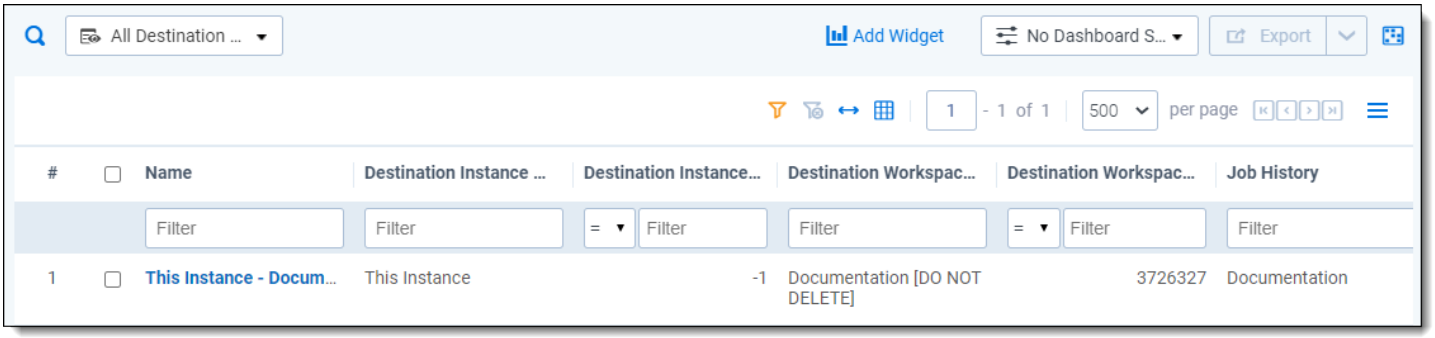
Error	Likely resolution
Destination field(s) mapped has different type. Review the mapping for the following field(s): field_1, field_2	Review the fields listed in the error message, and check if you have the same type as expected. If the reason for changing the type was to delete the file and re-create it, then it will be un-mapped. Correct the mapping saved in the Integration Point job, and run the job again.
Destination field(s) mapped may no longer be available or has been renamed. Review the mapping for the following field(s) [field name].	Review if the failing field(s) still exist in the destination workspace, correct the mapping saved in the Integration Point job, and run the job again.
Destination workspace is not available.	Verify if destination workspace exists.
Failed to copy source field into destination field due to missing child object. Review the following destination field(s): [field names]	Review the list of failing fields, create the child/parent relation in the destination workspace as it is in the source workspace and try again.
Saved search is not available or has been secured from this user. Contact your system administrator.	Verify that you have the required permissions for the saved search, or check to see if the saved search has been deleted. If needed, contact your system administrator to verify the saved search configuration.

Error	Likely resolution
User does not have sufficient permissions to access destination workspace. Contact your system administrator.	Confirm that you still have access to the destination workspace. It is also required that a System Admin account is present (used by an Integration Points Agent) and has access to the destination workspace.
Verify if a folder in destination workspace selected in the Integration Point exists or if a user has a proper permission to access it.	Verify that the folder used for the integration point still exists. Also, check the permission settings for the folders in destination workspace to confirm that it's not secured for the user's group.
Verify if a Production Set used as the location in destination workspace exists or if a user has a proper permission to access it.	Verify that the production set used as the location in the destination workspace still exists. Also, check the permission settings for productions in the destination workspace to confirm that it's not secured for the user's group.
Verify if a Production Set used as the location in destination workspace is in New status.	Verify that the production set used as the location in the destination workspace still has a status of New. Only productions with a status of New can be used as a production set in an integration point. If the production set was already staged or run, it isn't a eligible to be used for the integration point.
Verify if production, which is the data source of this Integration Point, still exist or if user has required permissions for it.	Check to see if the production used as the data source of the integration point still exists. Also, verify that you have the required permissions for the production used as the data source. If needed, contact your system administrator to verify your production permissions.
Verify if the user still has permission to create saved search on destination workspace.	Verify that you have the required permissions for creating a saved search in the destination workspace for this integrated point job. If needed, contact your system administrator to verify your production permissions. One of missing permissions could be Search in Object Security and Advanced & Saved Searches in Other Settings, both of which are set in the group permission on destination workspace.

8 Viewing destination workspaces

Note: We've streamlined our Staging boundaries to more effectively separate staging data from workspace and system data. With this change, you can no longer write to or access data outside of the four defined staging area folders. The four defined staging area folders: *ARM*, *ProcessingSource*, *StructuredData*, and *TenantVM*. Folders removed in the update include *FTA*, *Temp*, *Export*, and *dtSearch*. In addition to any other folders you manually created. Refer to the Staging Area FAQ in Community for more details.

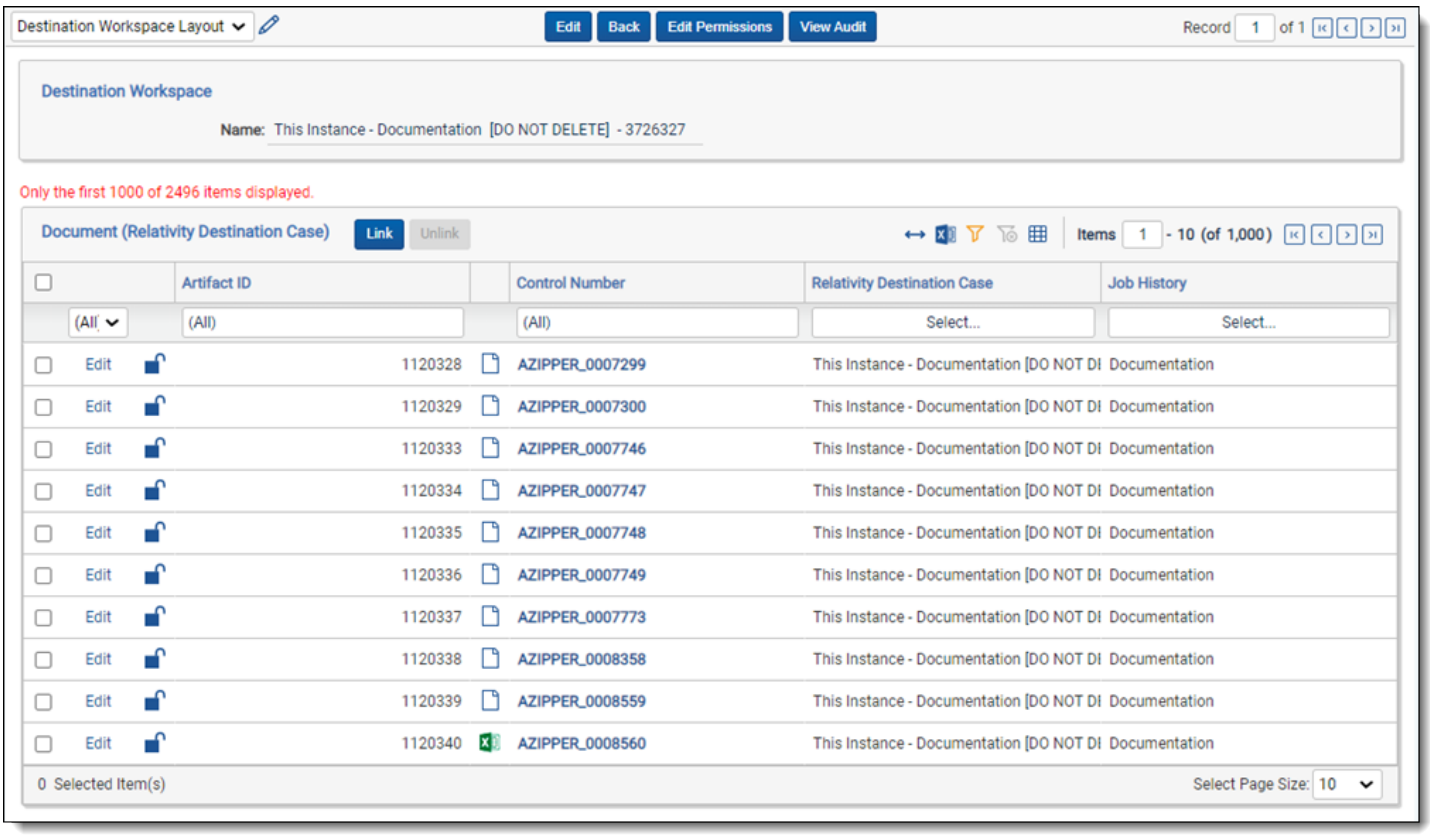
You can go to the Destination Workspace tab to view all of the workspaces that are designated as destinations for documents that you push through integration points.



The default All Destination Workspaces view provides the following fields:

- **Name**—the name given to the workspace, plus the artifact ID of the actual destination workspace.
- **Destination Workspace Name**—the name given to the destination workspace.
- **Destination Workspace Artifact ID**—the identifier of the destination workspace.
- **Job History**—a list of all the Job History entries associated with the destination workspace.

An individual destination workspace layout provides the following information in the associated **Document (Relativity Destination Case)** view.



- **ArtifactID**—the identifier of the document.
- **Control Number**—the control number of the document.
- **Relativity Destination Case**—a list of all the destination workspaces in which the document can be found.
- **Job History**—a list of audited actions associated with the document.

9 Microsoft Entra ID provider

Note: Microsoft has renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to Microsoft documentation for more information.

Relativity can import Entity (Employee/Custodian) data from Microsoft Entra ID (formerly known as Azure Active Directory) through Integration Points. The following prerequisites must be established:

1. In Relativity:
    a. You will need to install Integration Points into your workspace. See Installing Integration Points for details.
    b. Once Integration Points is installed, you will then need to install the Entra ID provider application. To do so, follow the steps:
        I. Go to the **Files** tab in Community and click **Relativity Applications**.
        II. Locate in the library and download Azure AD Provider for Integration Points ZIP file (old naming convention is temporary).
        III. Extract the downloaded archive.
        IV. Use the extracted RAP file for installing Entra ID application provider in your Application Library in Relativity. The application name is RIP AAD Provider (old naming convention is temporary).

    Completing these two installations adds Integration Points to your workspace and adds Microsoft Entra ID as a source within Integration Points.
2. In Microsoft Azure:
    - Set up an application in Microsoft Azure which can be used to configure an Integration Point in Relativity. Only an Application Administrator with access can create an application, find credentials, and delete an application. If you do not have permissions, contact your admin. For more information on Application Administrators, see Microsoft's documentation.
3. The final step is to import Microsoft Entra ID into Relativity. For more information, see Importing from Microsoft Entra ID on page 41.

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see Terms of Use.

9.1 Registering an Azure application and credentials

To create your application ID and secret, you must have Application Administrator privileges to log into your Azure Portal and register an app.

Start with registering your application in the Azure portal by following the steps below. For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

Note: These steps must be completed by a Microsoft 365 administrator.

1. Open your Azure Portal.
2. Click **Microsoft Entra ID** (formerly known as Azure Active Directory).

3. Click **App registrations**.
4. Click **New Registration** to display the Register an application page.
5. Enter an application name in the **Name** field.
6. Accept the default setting, **Accounts in this organizational directory only**, as the supported account type.
7. Click **Register**.
8. Once the application is registered, make note of the **Application (client) ID** and **Directory (tenant) ID** for use later when configuring the data source in RelativityOne Collect.

Next, from the app's page, add permissions to the web API by following the steps below:

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:
   - Directory – **Directory.Read.All**
   - Group – **Group.Read.All**
   - User – **User.Read.All**

   Note: This permission is required if Filter by Group functionality is used.
6. Click **Add Permission**.
7. Click **Grant Permission**.

Finally, grant Admin consent for the API by following the steps below:

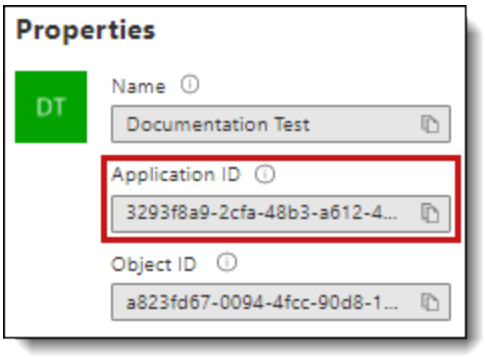
1. Click the **API Permissions** tab.
2. Click **Grant admin consent for [tenant]**.
3. In the pop-up window, click **Accept**.

9.2 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. For more information, see relevant Microsoft documentation on the Microsoft site.

1. Open your Azure Portal.
2. Click **Microsoft Entra ID** (formerly known as Azure Active Directory).
3. Navigate to **Enterprise applications**.
4. In the list of applications, locate and click on your application.The application page displays.
5. Navigate to **Properties**.

6. Click the **copy icon** next to the **Application ID**. The ID is copied to your clipboard to use as needed.



9.3 Removing application access

Removing access to an application can be done outside of Relativity in Microsoft Entra ID. To remove access, follow the steps below in the Azure Portal:

1. Click **Microsoft Entra ID**(formerly known as Azure Active Directory).
2. In the navigation menu, click **Enterprise applications**.
3. In the list of applications, locate and open the desired application.
4. In the application, click **Delete**.

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