RelativityOne Purview Sync

November 24, 2025

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

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1 Purview Sync

Purview Sync is an easy-to-use RelativityOne application for collecting your custodian's Microsoft 365 data directly from your Microsoft Purview Premium to RelativityOne.

This includes the following Microsoft 365 data:

- Outlook
- Teams
- Copilot
- OneDrive
- SharePoint

RelativityOne converts Teams and Copilot data into Relativity Short Message Format (RSMF), automatically overlays metadata load files, processes the data, creates custodians, and prepares it for review. For more information on RelativityOne converting Teams and Copilot data, see Data transformation.

1.1 Prerequisites

Before you get started, you will need the following access in Microsoft 365:

- Access to Entra ID by creating and updating Application registrations. For more information, see Register Purview Sync with Azure.
- A Microsoft 365 account with access to Purview eDiscovery Premium. Either *eDiscovery Manager* or *eDiscovery Administrator*. For more information, see Configure Purview Sync.

To use Purview Sync, you must:

1. Register an application with Microsoft Purview eDiscovery (Premium). For more information, see Register Purview Sync with Azure.
2. Update Azure permissions. For more information, see Grant users eDiscovery permissions in Microsoft Purview on page 18.
3. Connect RelativityOne to Microsoft Purview eDiscovery. For more information, see Configure Purview Sync.

For more information on the Microsoft Purview, see Microsoft's documentation for Microsoft Purview compliance portal.

1.1.1 Licensing requirements

To use Purview Sync, your organization must have an Office 365 E5 subscription for your custodians, or related E5 add-on subscription. If you only have E3 licenses, then you are only able to use Purview eDiscovery Standard, which does not currently work with the Purview Sync application.

- Microsoft 365 E5
- Office 365 E5
- Microsoft 365 Education A5
- Office 365 Education A5
- Microsoft 365 F5 Compliance add on or F5 Security and Compliance add on
- Microsoft 365 G5

- Microsoft 365 G5 with G5 eDiscovery and Audit add on
- Microsoft 365 E3 with E5 Compliance add on
- Microsoft 365 E3 with E5 eDiscovery and Audit add on

1.1.2 Permissions

To complete the entire Purview Sync workflow, you will need the following permissions in RelativityOne.

Tab Visibility	Other Settings
Purview Sync • Import • Configuration	Allow Purview Sync

1.2 Supported data formats

Purview Sync supports the whole Microsoft 365 data suite, including *Inactive* and *Archived Mailboxes*.

Here are prerequisites for particular formats:

- Teams—for more information, see Relativity Short Messaging File conversion on page 41.
- Modern attachments:
  - Teams chats: supported. Both Teams chats and their linked attachments are imported and converted to RSMF. A proper family relation is created between the parent Teams chat and its child attachment.
  - Emails: partially supported. Both parent email and its linked attachment are imported and converted to RSMF but Purview Sync does not currently establish a family relation between the email and its attachment.
- Sensitivity labels, retention labels, tags, and other Microsoft Purview labels—supported. Purview Sync imports whichever labels are included in a load file exported together with native files from Microsoft Purview. Please note that for now, Sensitivity Labels are exported as GUIDs and not value. This is an expected behavior confirmed with Microsoft.
- Text redacted in Microsoft Purview—unsupported as it is not a part of Microsoft load file.
- Cards, Viva Engage, loop components—partially supported. See Relativity Short Messaging File conversion for details.
- Fluid and White Board messages—currently unsupported.

1.3 Choosing to use Purview Sync or Collect

Relativity designed Purview Sync for customers who already use, or plan to use, Microsoft Purview Premium for eDiscovery work. The Purview Sync workflow supports imports of whole Review Sets, which can contain a variety of M365 data from Microsoft Purview.

Collect is a RelativityOne application designed to efficiently locate and collect relevant data from Microsoft 365 (M365), GCC, and GCC High environments. It leverages purpose-built connectors for Microsoft data sources—such as Exchange, OneDrive, SharePoint, and Microsoft Teams—to seamlessly ingest content directly into RelativityOne without intermediate systems.

Most collection workflows are supported with a standard M365/GCC E3 license. Microsoft Teams collections require a Premium (E5) license. Collect does not rely on Microsoft Purview to create cases or review sets, allowing end-to-end data collection entirely within RelativityOne.

With an intuitive interface and automated workflows, Collect streamlines evidence intake by enabling users to configure, run, and monitor collections from a single platform.

1.3.1 Delegated and application permissions

A crucial difference between Purview Sync and Collect applications are Azure Active Directory permissions.

- Purview Sync uses delegated permissions. Delegated permissions restrict access of a signed-in user to only what they have been granted.
- Collect uses Application Permissions which give the application a broader, tenant-level access without user context.

1.3.2 Inactive and archived mailboxes

Purview Sync supports inactive and archived mailboxes based on the application's integration with Microsoft Graph API.

Collect provides support for online archived mailboxes via the Exchange Web Services (EWS) API. Currently, it does not provide support for inactive mailboxes.

2 Install Purview Sync

This topic provides the prerequisites and the steps for installing the Purview Sync application.

2.1 Prerequisites

Before installing the application, note the following prerequisites:

- Purview Sync is a workspace-level application and you must have a workspace where you will install and configure it.
- You must install the Processing app in the same workspace that you installed Purview Sync. For more information, see Processing documentation.
  - In your processing profile, you must set the **Auto-publish set** field to *Yes*. For more information, see Processing documentation.
  - Setting the **Auto-publish set** to *Yes* automatically starts the publishing process after the completion of discovery.

2.2 Installing the app

To install the Purview Sync application to a workspace:

1. Navigate to the workspace where you want to install the application.
2. Navigate to the **Relativity Applications** tab.
3. Click **New Relativity Application** to display an application form.
4. Click the **Select from Application Library** radio button in the Application Type section.
5. Click in the **Choose from Application Library** field.
6. Select **Purview Sync** on the Select Library Application dialog.
   - This dialog only displays applications added to the Application Library.
7. Click **Ok** to display the application in the Choose from Application Library field. The application form also displays the following fields:
   - **Version**—displays the version of the application that you are installing.
   - **User-friendly URL**—displays a user-friendly version of the application's URL. This field may be blank.
   - **Application Artifacts**—displays object types and other application components.
   - **Map Fields**—there are no fields available in Relativity Legal Hold for mapping.
8. Click **Import** to install Purview Sync into the workspace.
9. Review the import status of the application. Verify that the install was successful or resolve errors.

Optionally, you can add the Purview Sync tab to the sidebar.

At the workspace level:

1. Navigate to the **Tabs** tab.
2. Select **Purview Sync**.
3. Click the **Edit** button.

4. Select, or confirm, the **Visible** toggle is on.
5. Click the **Show in Sidebar** toggle so it is *On*.
6. Select **Data Transfer**r for the *Icon* field.
7. Set the **Order** accordingly.
8. Click the **Save** button.

You can now find the Purview Sync icon in your tabs.

3 Register Purview Sync with Azure

Purview Sync uses the Microsoft Graph API. To use the API, you need to register the application with Azure. Authentication requires a reference to a dedicated Azure application that has the appropriate permission. This needs to be done on the client side by an Azure user with sufficient rights.

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.

Note: At different times in this guide, you will be instructed to take note of certain values and tokens. We recommend opening a text editor or Word document during this process to copy and paste these values, so they are readily available to paste into RelativityOne.

There are two ways to register Purview Sync application with Azure. These are:

- Automated script—run a PowerShell script as an Azure Admin where all permissions will be set automatically.
- Manually—log in to Azure as an Admin and setup the app registration manually.

Note: The person completing the application registration process needs to be an Azure Administrator with sufficient privileges. Refer to Microsoft's documentation for more details.

As a result of the App Registration Process, either automated or manual, final values required for RelativtiyOne Purview Sync configuration are collected. Save them in a safe location. These values are as follows:

- **Client ID:** For example, 1234567890abcdef1234567890abcdef
- **Authority URI:** For example, https://login.microsoftonline.com/abcdef1234567890ab1234567890abcd
- **Redirect URI:** For example, https://kcura.relativity.one/Relativity/CustomPages/4985c522-5931-41ba-bf67-7d58ee96e6d1/index.html
- **Client Secret:** For example, w7X...<onlyshownonce>...

3.1 Automating Purview Sync registration in Azure Active Directory with a script

You can automate your Purview Sync registration in Azure Active Directory using the provided PowerShell script: PvS-MSFT-Automation-Script.ps1. After you run the script, the registration process will complete automatically. If your organization restricts script execution, check with your IT or Security team to ensure you have the required permissions.

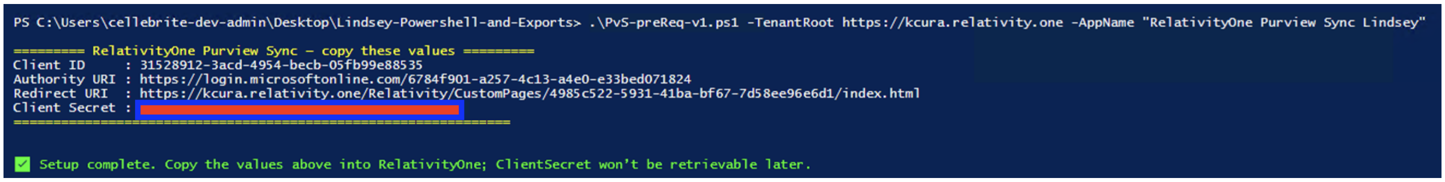
Requirements:

- You must be an Azure AD Global Administrator.PowerShell 5.1+ with execution policy allowing local scripts.
- Internet access to login.microsoftonline.com and graph.microsoft.com.
- The script auto-installs Microsoft.Graph modules if missing. This requires install-module privileges.

To register the app with the PowerShell script, follow the steps:

1. Download the PvS-MSFT-Automation-Script.ps1 file.
2. Open PowerShell Window.

3. Run the following command. Change *TenantRoot* to your Relativity instance name and AppName to the name you want to use for the Azure App Registration.
   .\PvS-preReq-v1.ps1 -TenantRoot "https://kcura.relativity.one" -AppName **"RelativityOne Purview Sync"**
4. After the script is run, copy the values from the PowerShell output to a safe location. You will need them to configure Purview Sync in RelativityOne later.



For more details, refer to the Community article RelativityOne - Purview Sync: Azure Active Directory Registration Script.

3.2 Registering an Azure application and credentials manually

Complete the steps in this section to create an application registration that you need for email and for syncing to Entra ID.

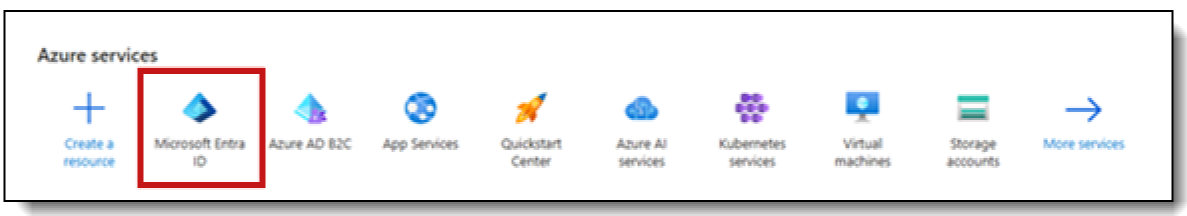
To create your application ID and secret, you must have Application Administrator privileges to log into your Azure Portal and register an app.

Store your application ID and Secret in a safe place as you will need it in Relativity.

To register your app:

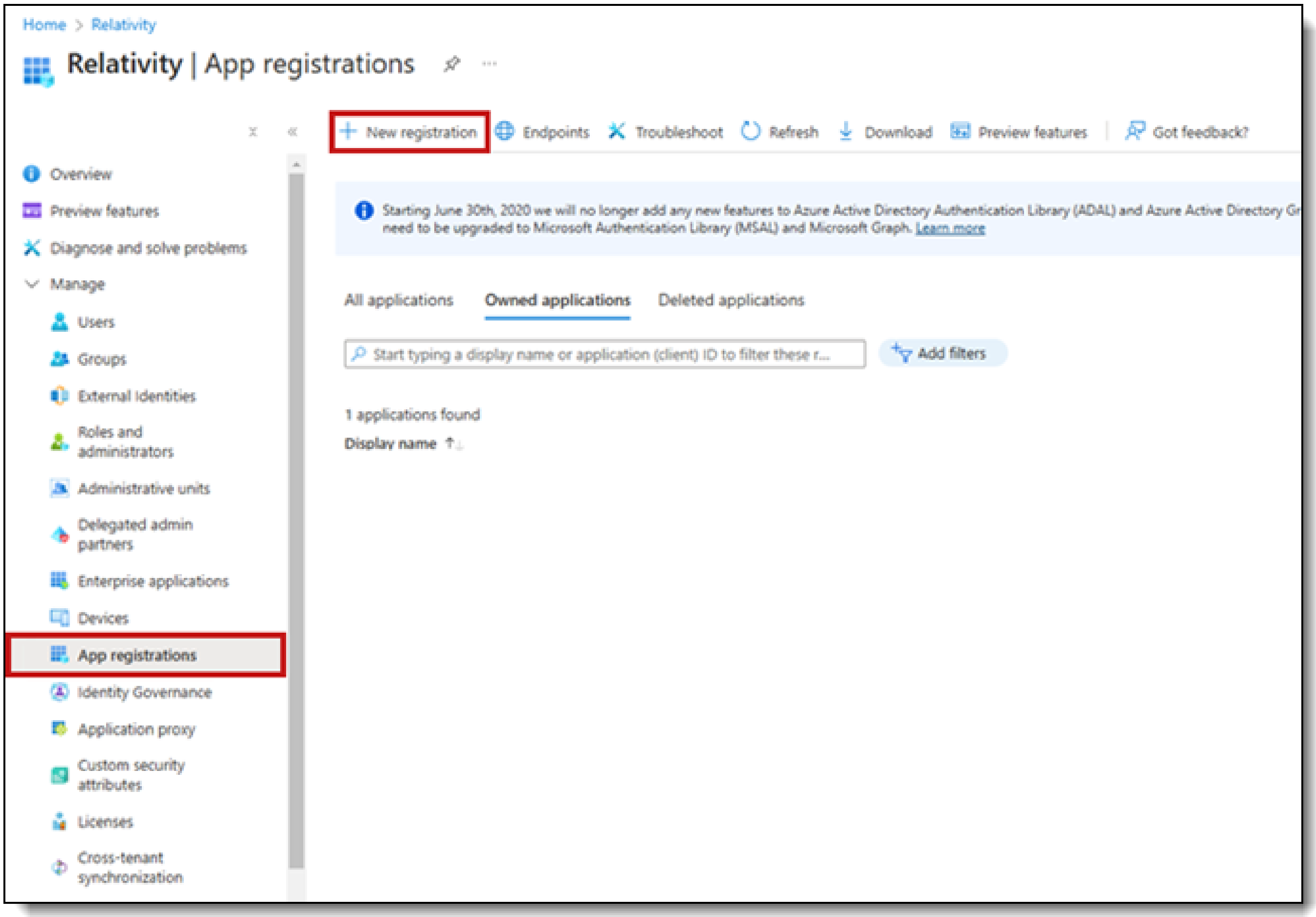
Note: The person completing the application registration process needs to be an Azure Administrator with sufficient privileges.

1. Open your Azure Portal.
2. Click **Microsoft Entra ID**.



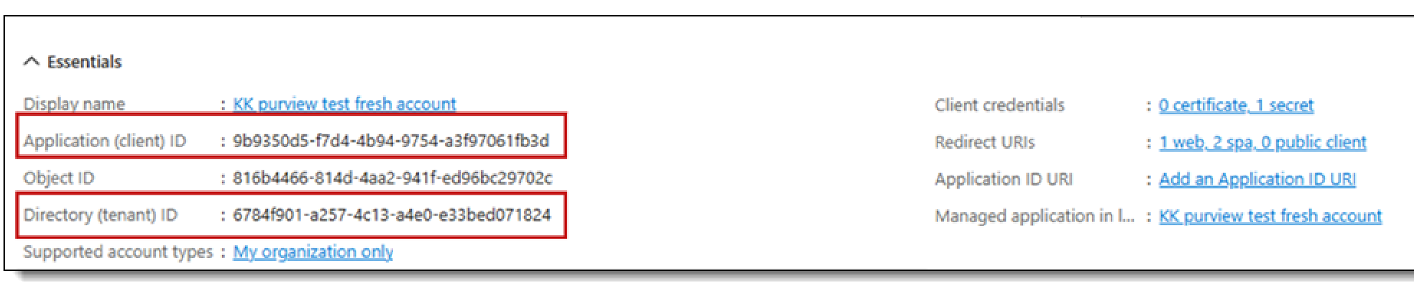
3. In the left-navigation menu, select **App registrations**.

4. Click **New Registration**.
   This will open the Register an application page.



5. Enter an application name in the **Name** field. For example, *RelativityOne Purview Sync*.
6. Select **Accounts in this organizational directory only - Single tenant** as the supported account type.
7. Select **Single-page application (SPA)** in the drop-down menu in the Redirect URI field.
8. Enter *https://[RelativityOne URL up to the word relativity forward slash] + CustomPages/ 4985c522-5931-41ba-bf67- 7d58ee96e6d1/index.html* for the Redirect URI field. For example, *https://-company.relativity.one/Relativity/CustomPages/4985c522-5931-41ba-bf67-7d58ee96e6d1/index.html*.
9. Click **Register**.

When you complete the application registration, take note of the Application (client) ID field and Directory (tenant) ID field. These will be later used in Relativity.



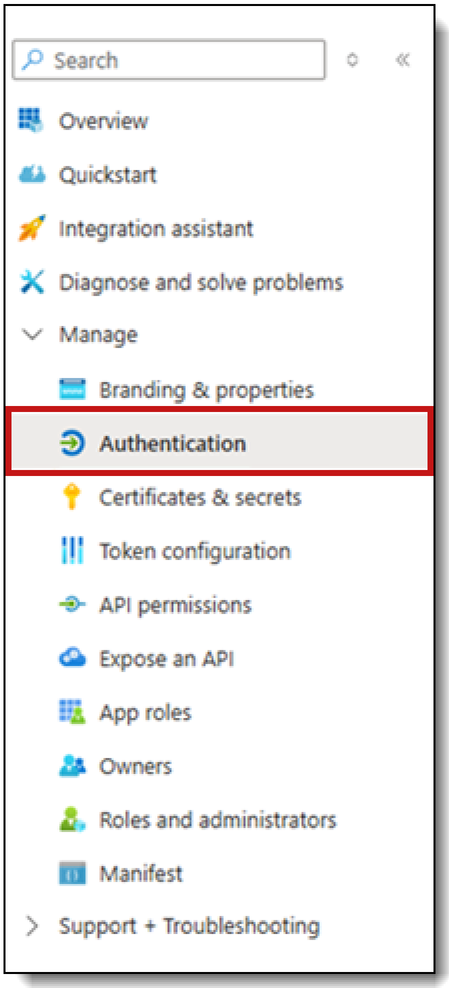
For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

3.2.1 Authentication

For authentication, you must add a *redirect URI*.

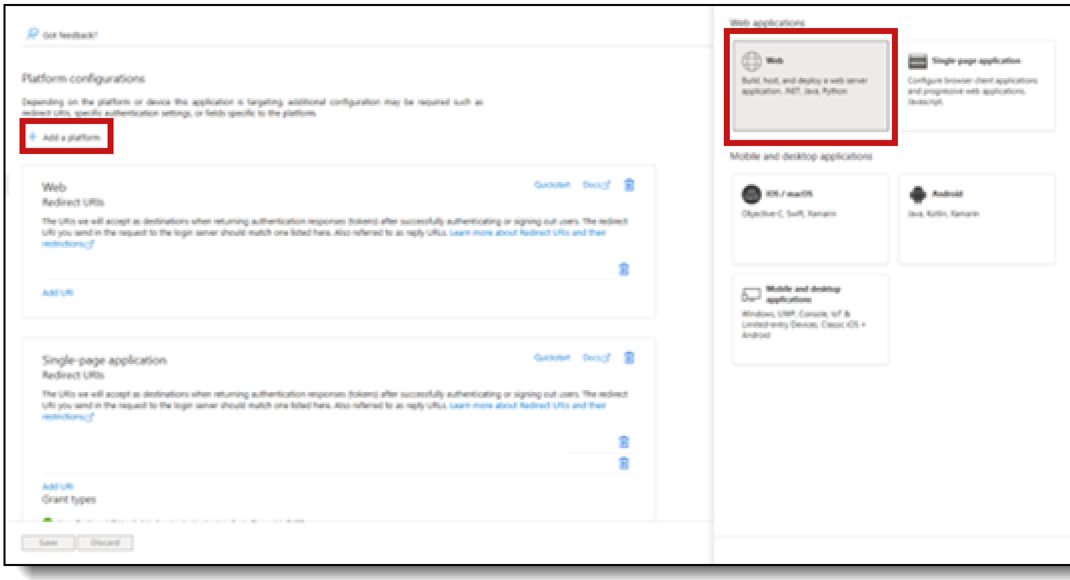
To add a redirect URI:

1. Select **Authentication** from the left-side menu.

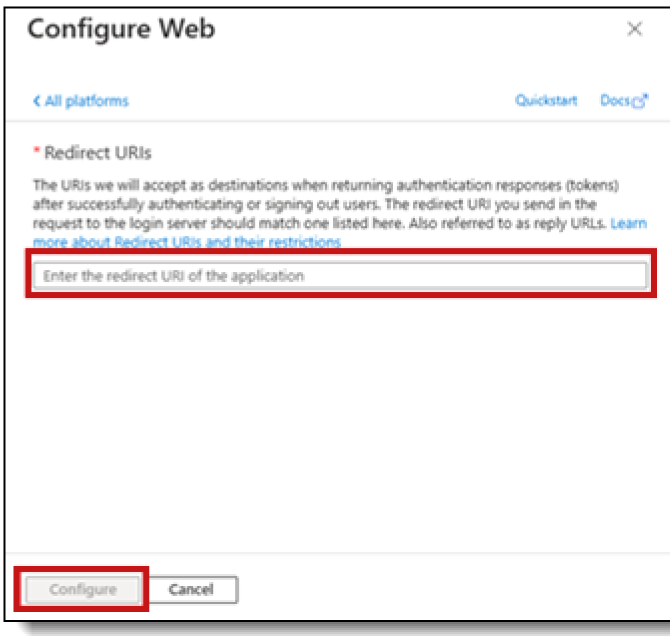


2. Locate the *Single-page application box* and select **Add URI**.
3. In the **Redirect URI** field, enter *https://[RelativityOne URL up to the word relativity forward slash] + CustomPages/ 4985c522-5931-41ba-bf67-7d58ee96e6d1/ms-auth-popup-redirect.html*. For example, *https://company.relativity.one/Relativity/CustomPages/4985c522-5931-41ba-bf67-7d58ee96e6d1/ms-auth-popup-redirect.html*.

4. Locate the **Web** box and select **Add URI**.



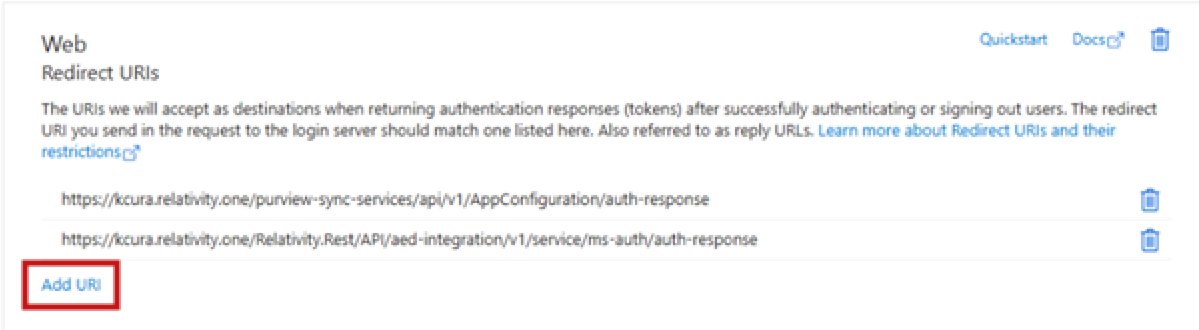
5. In the **Redirect URI** field, enter *https://[RelativityOne URL without including the word relativity forward slash]* + *Relativity.Rest/API/aed-integration/v1/service/ms-auth/auth-response*. For example, *https://-company.relativity.one/Relativity.Rest/API/aed-integration/v1/service/ms-auth/auth-response*.

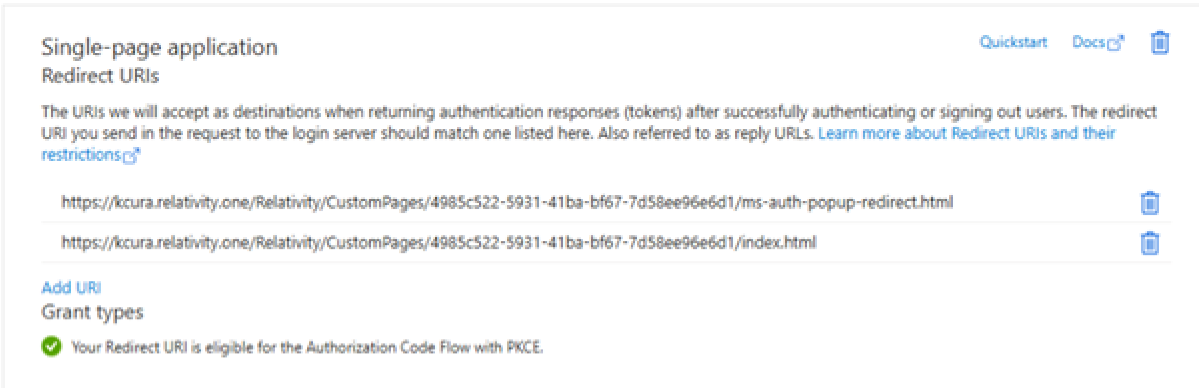


6. Select **Save**.

7. Add additional redirect URI under Web. Click the **Add URI** button again and enter *https://[RelativityOne URL without including the word relativity forward slash]* + *purview-sync-services/api/v1/AppConfiguration/auth-response.* For example, *https://company.relativity.one/purview-sync-services/api/v1/AppConfiguration/auth-*

response.





8. Select **Save**.

3.2.2 Creating a client secret

A client secret from Microsoft Azure AD is needed to integrate Microsoft and Relativity.

To create a client secret:

1. In the left-navigation menu, click **Certificates & secrets**.
2. Navigate to the **Client secrets** tab.
3. Click the **New Client Secret** button.

   Note: Do not navigate away from the page once the client secret is created.

4. Populate the **Description** and **Expires** fields. You can leave the default, or recommended, values.
5. Click the **Add** button.
   If the client secret was successfully created, Microsoft will display the Client Secret on the table and the Value field in plain text.
6. Copy the **Value** field and securely store it.

Microsoft hides the Value field if you leave the page and then come back to get the value. At this point, you cannot copy it.

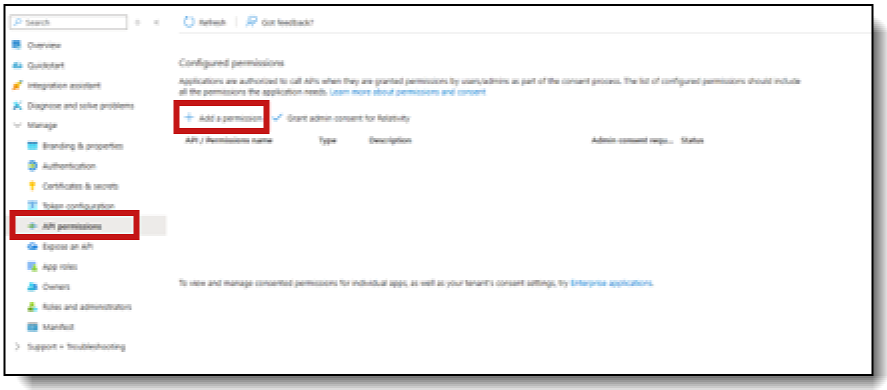
You can repeat steps 4-5 to generate a new client secret.

3.2.3 Setting API permissions

Open the application to view the application's homepage. From the application's page, add permissions to the web API.

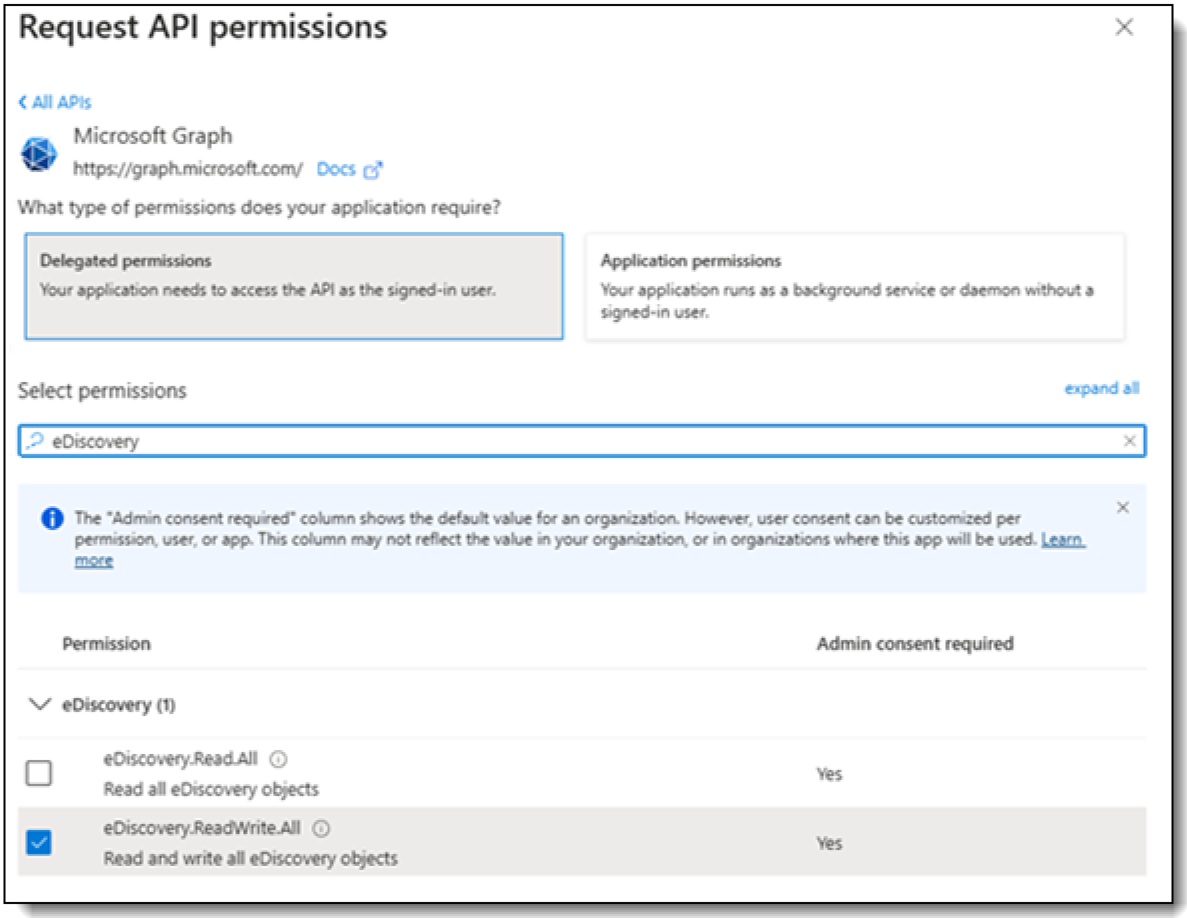
To add permissions:

1. Click **API permissions**.
2. Click **+ Add a permission**.



3. Click **Microsoft Graph**.
4. Select **Delegated Permissions**.
5. Select the **eDiscovery.ReadWrite.All** option from the Delegated Permissions section.

6. Click **Add Permissions**.



7. Click **Grant admin consent for [Tenant Name]**.

Notes: You need the *Global Administration* role to complete this action.

At this point the Application should be fully configured. It can take a few minutes to update.

3.2.4 Create the service principal

There is a special permission not available in an application registration by default. This is the *eDiscovery.Download.Read* permission that allows the transfer of data. It becomes available once you create a *Service Principal* for your Azure tenant. For more information, see Microsoft's documentation.

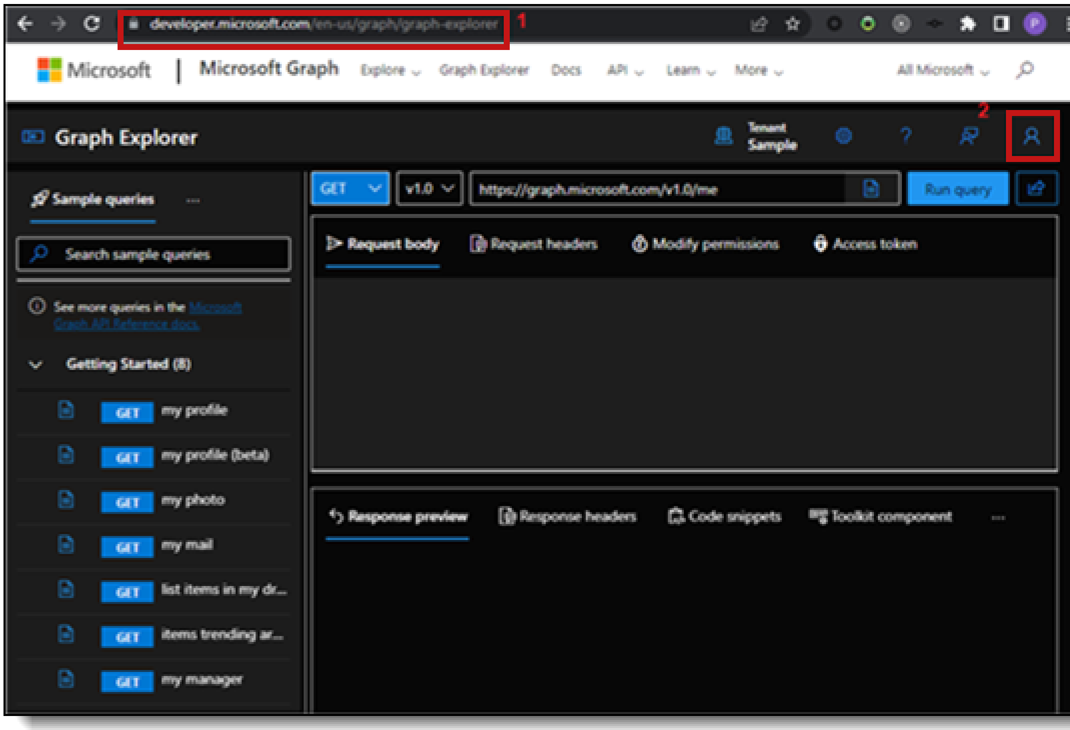
We recommend using Microsoft Graph Explorer to do this. The address to graph explorer is https://developer.microsoft.com/en-us/graph/graph-explorer.

Before using Microsoft Graph Explorer, you need an account that has *Application.ReadWrite.All* permission. If you are not sure what this means, ask someone in your organization with the Global Administrator role in your Azure tenant. For more information on the required permissions, see Microsoft's documentation, https://learn.microsoft.com/en-us/graph/api/serviceprincipal-post-serviceprincipals.

Creating the service principal steps:

1. Navigate to *https://developer.microsoft.com/en-us/graph/graph-explorer*.

2. Click on the avatar icon on the top right. This should open a login window, where you can login with your credentials.



3. Click on the blue **GET** button. Select **POST** as the query method.

4. Enter **https://graph.microsoft.com/v1.0/servicePrincipals** in the URI field.

5. Under Request body, enter: **{ "appId": "b26e684c-5068-4120-a679-64a5d2c909d9" }**.

Note: Do not forget the curly brackets.

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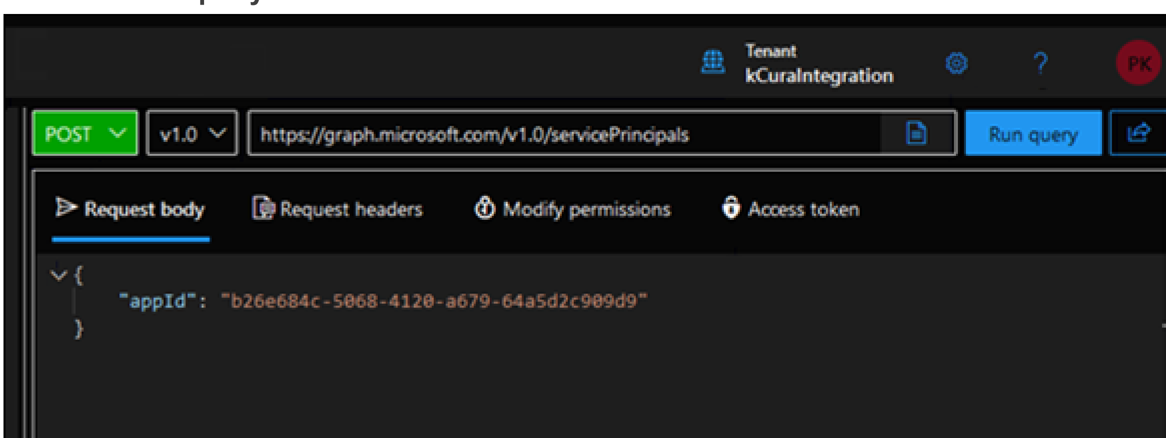
6. Press the **Run query** button.



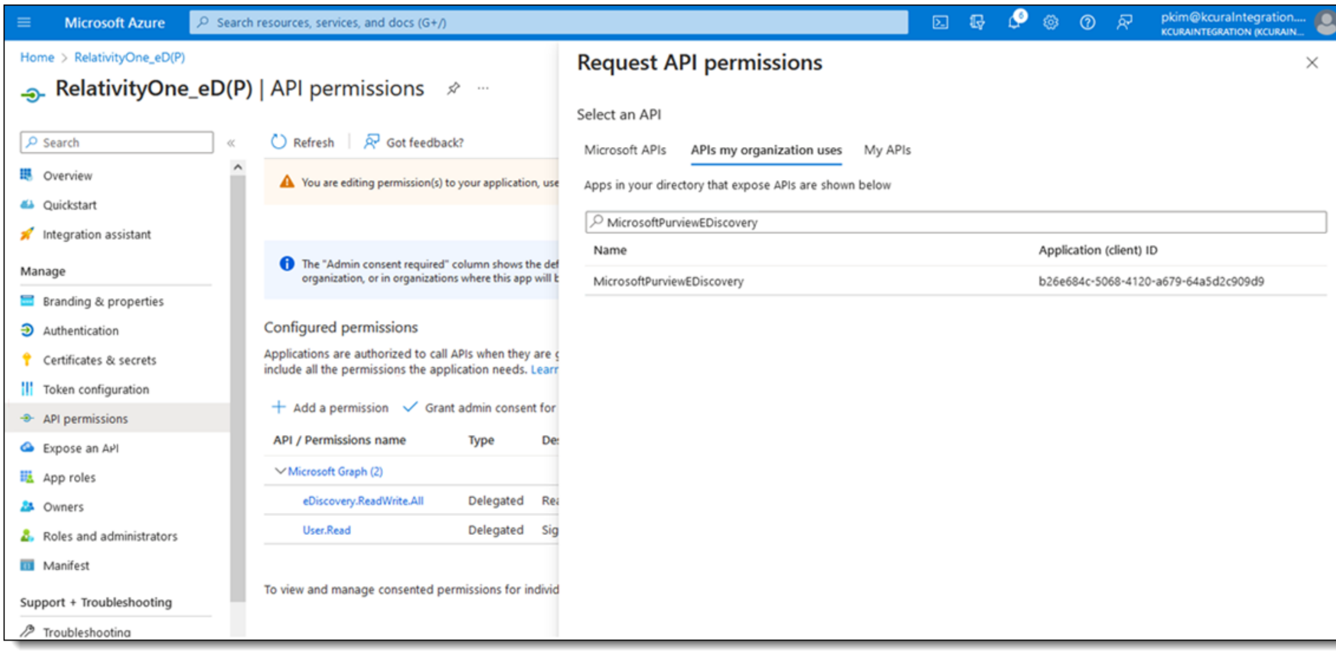
7. Confirm you received a **Created – 201** response.

Note: If it's already set up, you will see a 409 error.

3.2.4.1 Configure permissions

Now you need to add the *eDiscovery.Download.Read* permission we made available by adding the service principal in the *Create a Service Principal* section. Navigate back to Microsoft Azure Portal, to the application registration you set up earlier.

1. Click the **API permissions** in the left-hand side menu.
2. Click **+ Add a permission**.
3. Select the **APIs my organization uses** tab.
4. In the search bar, enter *MicrosoftPurviewEDiscovery*.
5. Select the application **MicrosoftPurviewEDiscovery** search result.



6. Select the **Delegated Permissions** box.
7. Select **eDiscovery.Download.Read**.
8. Click **Add permissions**.
9. Click **Grant admin consent for [TENANT NAME]**.

Notes: You need the *Global Administration* role to complete this action.

10. In the pop-up modal that appears, click **Yes**.

You completed configuring the application registration with Azure. Now onto Relativity.

3.3 Grant users eDiscovery permissions in Microsoft Purview

There are two categories of permissions to use the Purview Sync app:

- **Azure Active Directory roles**—necessary to grant eDiscovery permissions.
- **Purview eDiscovery Premium roles**—necessary to execute actions in Purview eDiscovery Premium, and the Purview Sync application within RelativityOne.

Note: If there is already a user with Azure eDiscovery Admin permissions to create cases within Purview eDiscovery Premium, you can skip this section and move to Configure the Connection Between RelativityOne and Purview eDiscovery Premium.

Before starting, the user performing the actions in this section must have:

- **Azure Active Directory role**—Compliance Administrator, to be able to read, configure, and manage compliance permissions with Microsoft Purview, formerly known as Security & Compliance Center.
- **Azure Active Directory role**—Compliance Data Administrator, to be able to create and manage compliance content within Microsoft Purview.

Once the Compliance Administrator and Compliance Data Administrator roles have been assigned to the person configuring this user, that user will then be able to configure permissions within the Microsoft Purview compliance portal here.

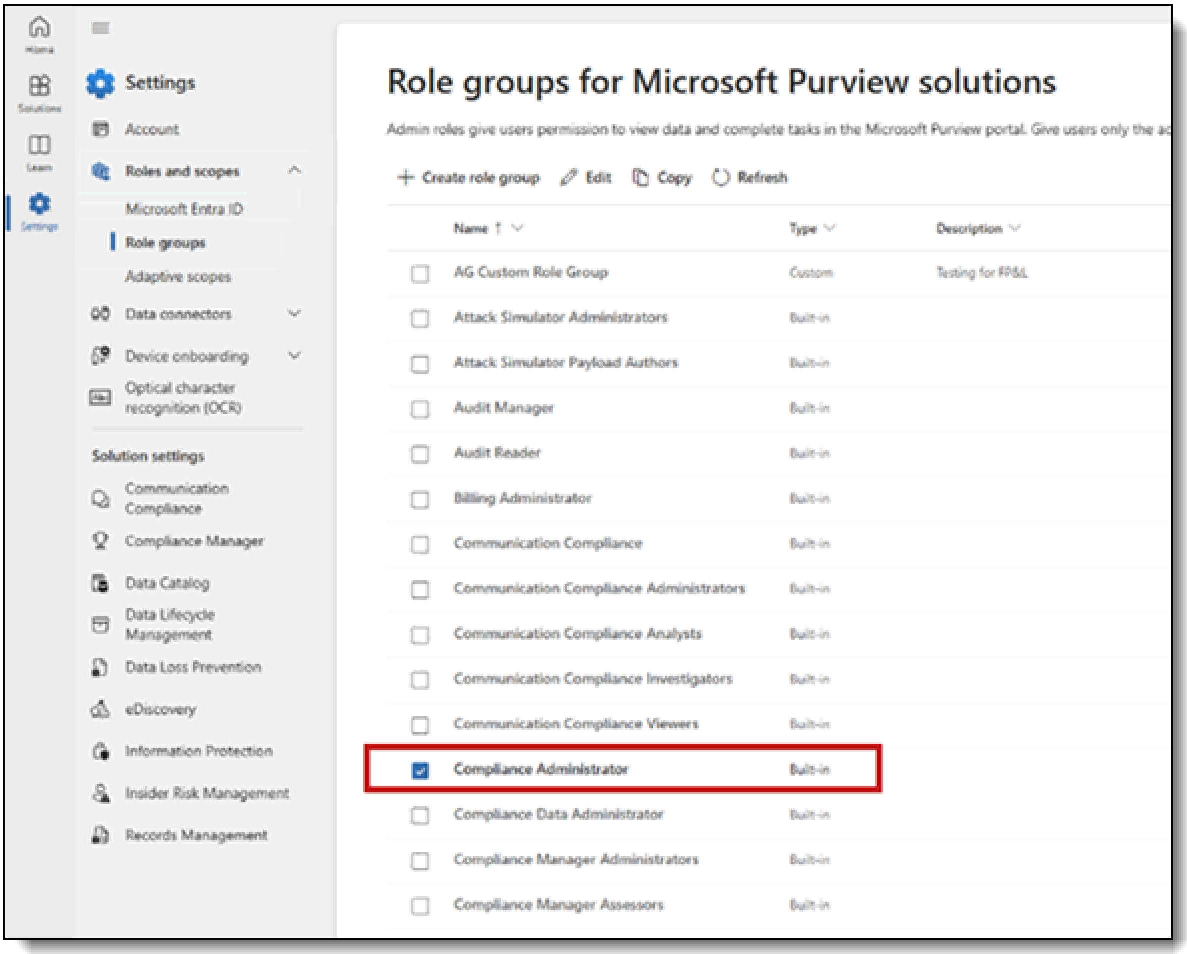
Note: If you see a screen that the Microsoft compliance portal is retired, it might mean that you are using the old Microsoft compliance portal that was disabled in November 2024. Navigate to the new Microsoft Purview instead.

3.3.1 Setting up Compliance Admin roles

To set up Compliance Admin roles to use Azure AD:

1. Navigate to https://purview.microsoft.com and log in.
2. Click **Settings > Roles and scopes > Role groups**.
3. Click the **Compliance Administrator role > Edit > Choose users**.
    - Ensure all users, including service accounts that will be using Purview Sync in RelativityOne, are assigned this role.
    - If there are users that need to be added, click the **Add assignments** button to add them.

- Close the **Assignments** page once all the appropriate users have been added.



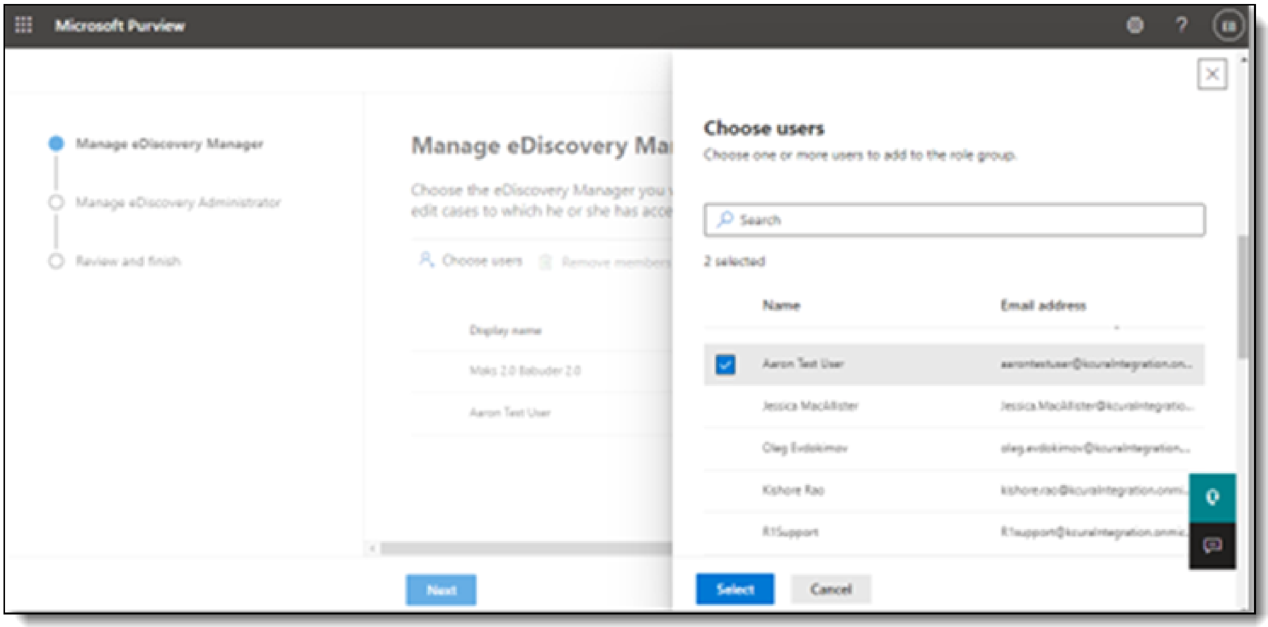
4. Click the Compliance **Data Administrator role > Edit > Choose users**.
   - Ensure all users, including service accounts that will be using Purview Sync in RelativityOne, are assigned this role.
   - If there are users that need to be added, click the **Add assignments** button to add them.
   - Close the **Assignments** page once all the appropriate users have been added.

3.3.2 Purview eDiscovery Premium Permission Management for users

1. Navigate to https://purview.microsoft.com and login.
2. Click **Settings > Roles and scopes > Role groups** under the Microsoft Purview solutions section.
3. Click **eDiscovery Manager**.
4. Select **Edit**.
5. Assign that user to the **eDiscovery Manager** role by following these sub-tasks if you want a user to be able create cases in Purview eDiscovery Premium, but not see other cases. If not, skip to step 6:
   a. Click the **Choose users** button.
   b. Select the users to add to the eDiscovery Manager role in the right-side menu.
   c. Click the **Select** button.

d. Click the **Next** button at the bottom of the page until you navigate through **Manage eDiscovery Administrator** and **Review and finish** options.

e. Click the **Save** button.



6. If you want to allow a user the capability to create cases and see cases that other users have created, then assign that user to the **eDiscovery Administrator** role by following these sub-tasks, otherwise skip to the next section.

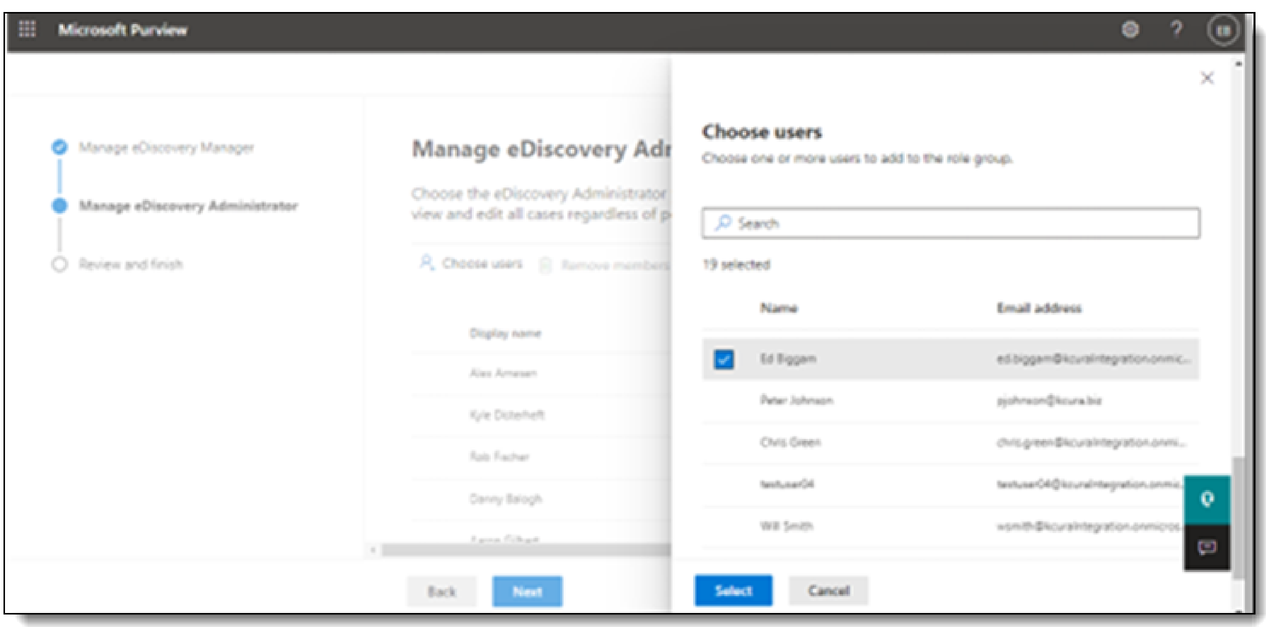
   a. Click the **Next** button to navigate to the **Manage eDiscovery Administrator** options.

   b. Click the **Choose users** button.

   c. Select the users to add to the **eDiscovery Administrator** role in the right-side menu.

   d. Click the **Select** button.

   e. Click the **Save** button.



You have now granted a service or user eDiscovery permissions in Microsoft Purview.

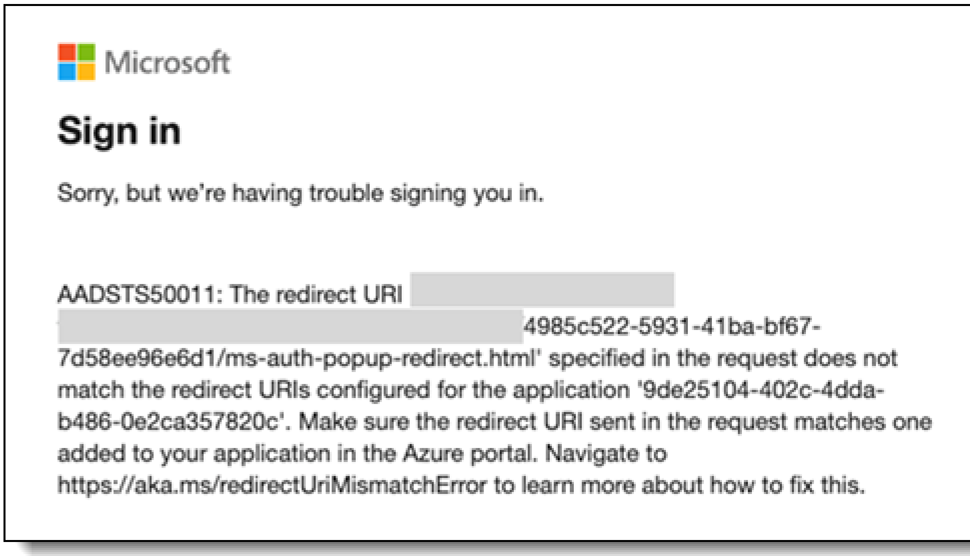
4 Purview Sync Application registration issues troubleshooting

In this topic, you can find solutions to common issues when registering the Purview Sync application with Microsoft.

4.1 Common issues

Click on any of the scenarios to see the cause of the issue and the resolution.

User cannot log in and gets an error. Error message informs about mismatch in redirect URI configuration.



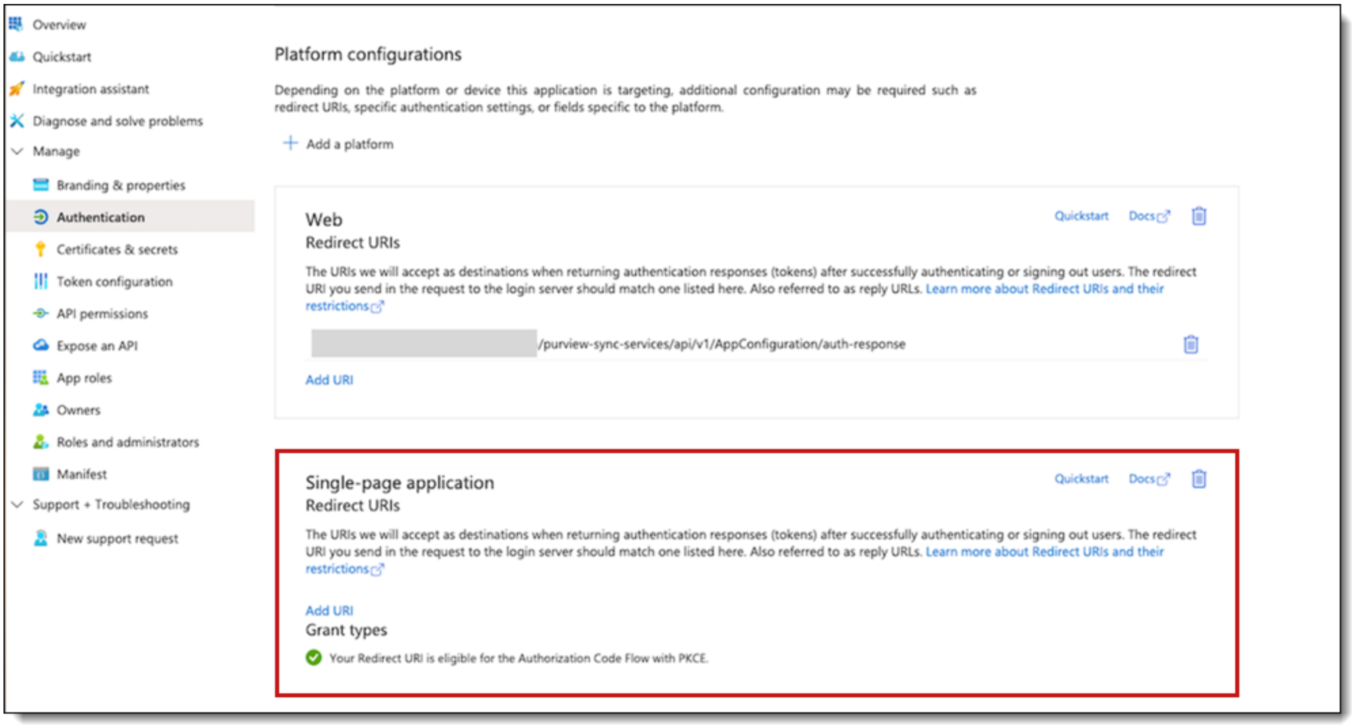
Cause

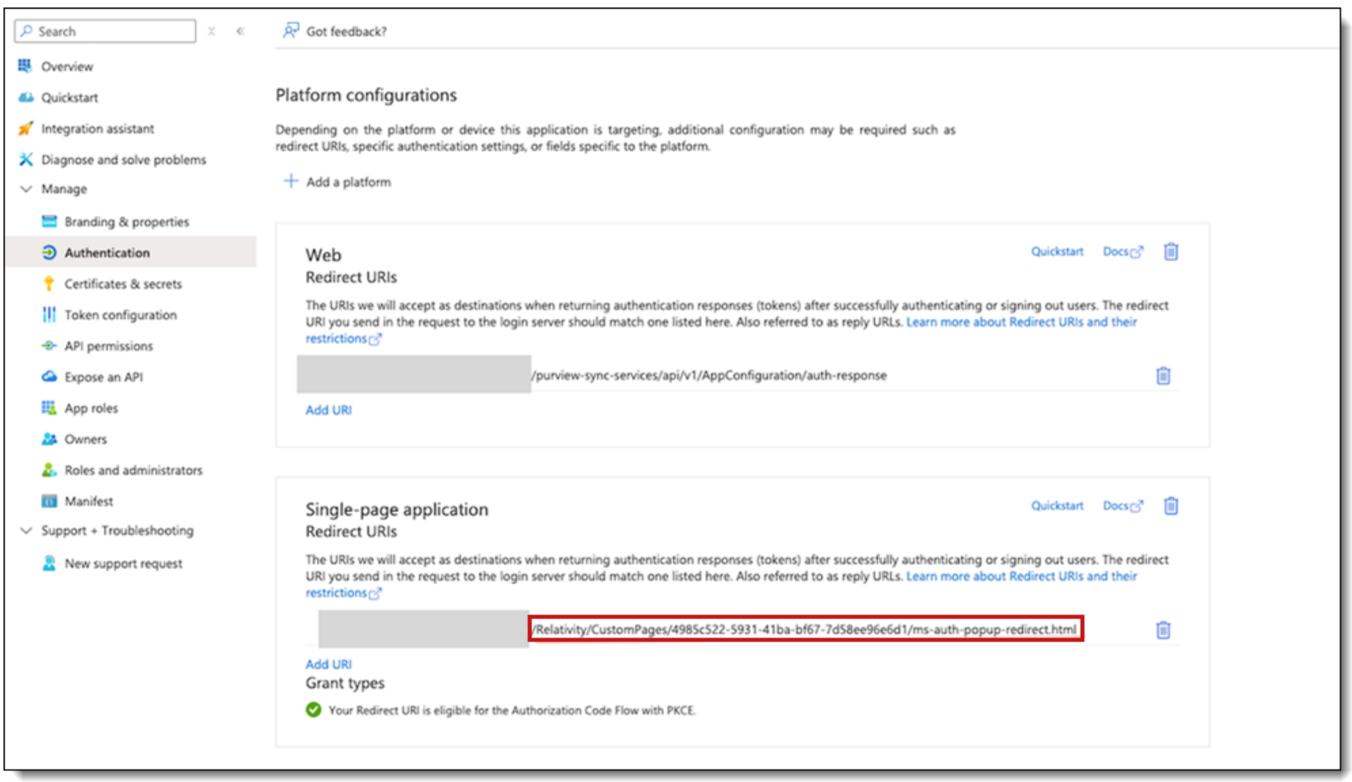
You have not configured the redirect URI. On the Authentication page, in the section Single-page application, the Redirect URIs does not have a configured URI.

Fix

To resolve this issue:

1. Copy the redirect URI mentioned in the error message.
2. Paste the redirect URI to Single-page application.
   You can also create a URI. For more information, see [Authentication](#).





You can now sign into Microsoft.

When you Validate/Refresh Data Transfer Authorization user gets error message :This page isn’t working.

Cause

User Client Secret is wrong or expired.

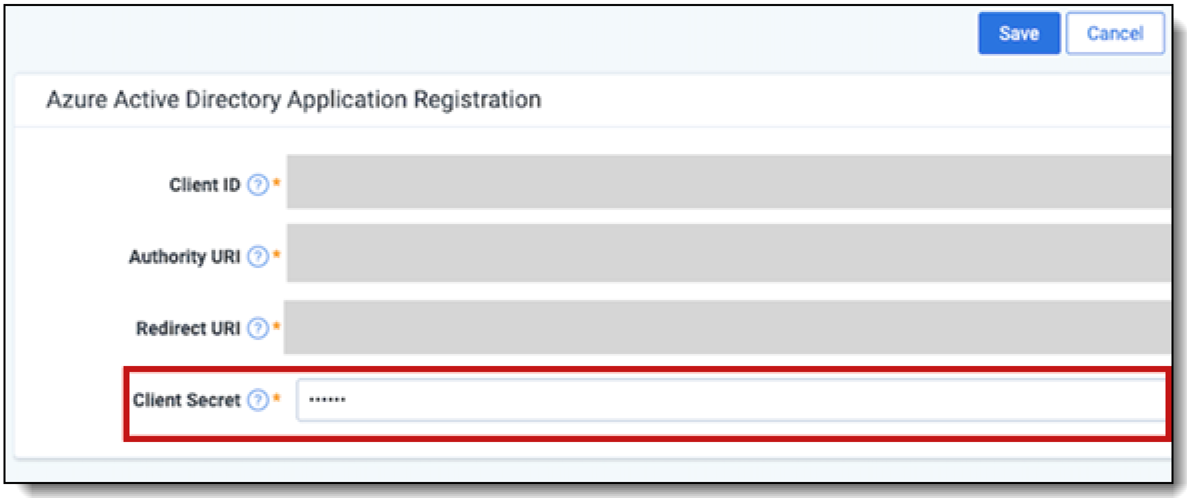
Fix

Check that you provided Client Secret that is not expired.

To update the client secret:

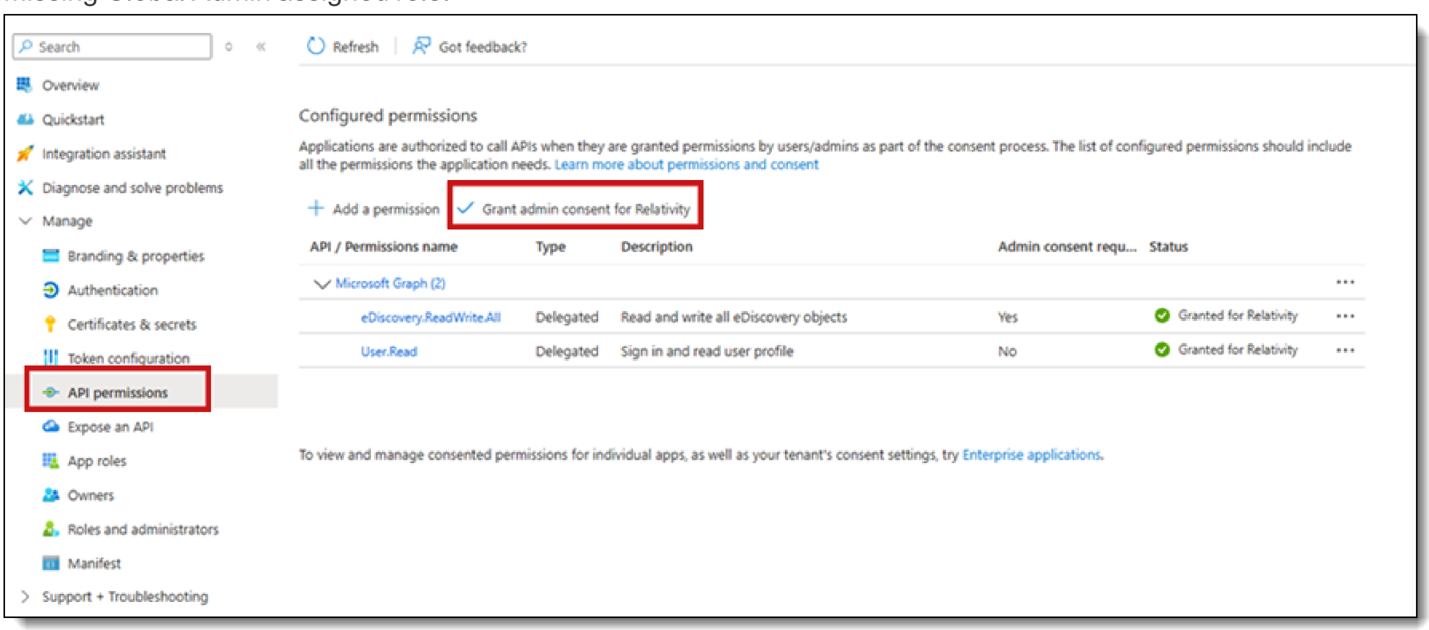
1. In RelativityOne, navigate to **Purview Sync > Configuration**.
2. If secret is not expired, click **Edit** Purview Sync configuration.
3. Update the Client Secret field.
4. Click **Save**.

For more information, see Creating a client secret.



Azure -> Application Configuration ->API permission: Grant admin consent button is not active.
Cause

Missing Global Admin assigned role.



Fix

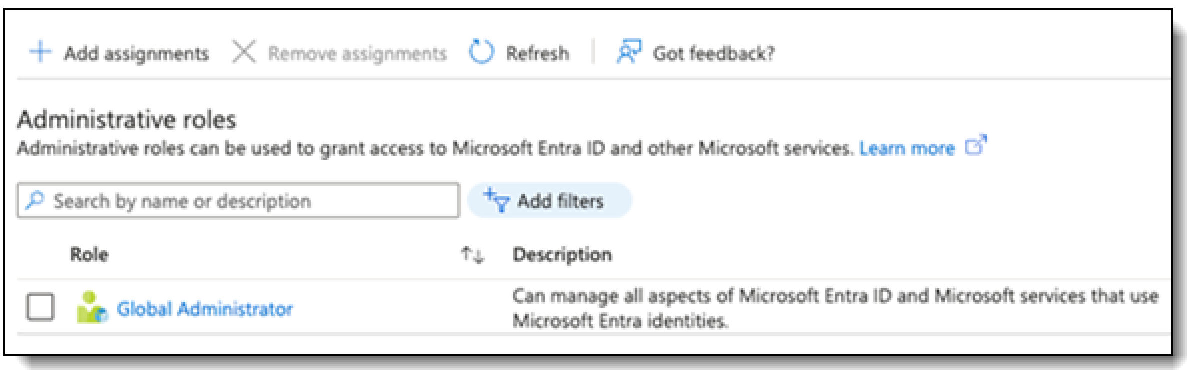
To update the missing Global Admin role:

1. In Azure, navigate to **Users**.
2. Search for your user.

3. Go to **Assigned roles** and click link next to the text.

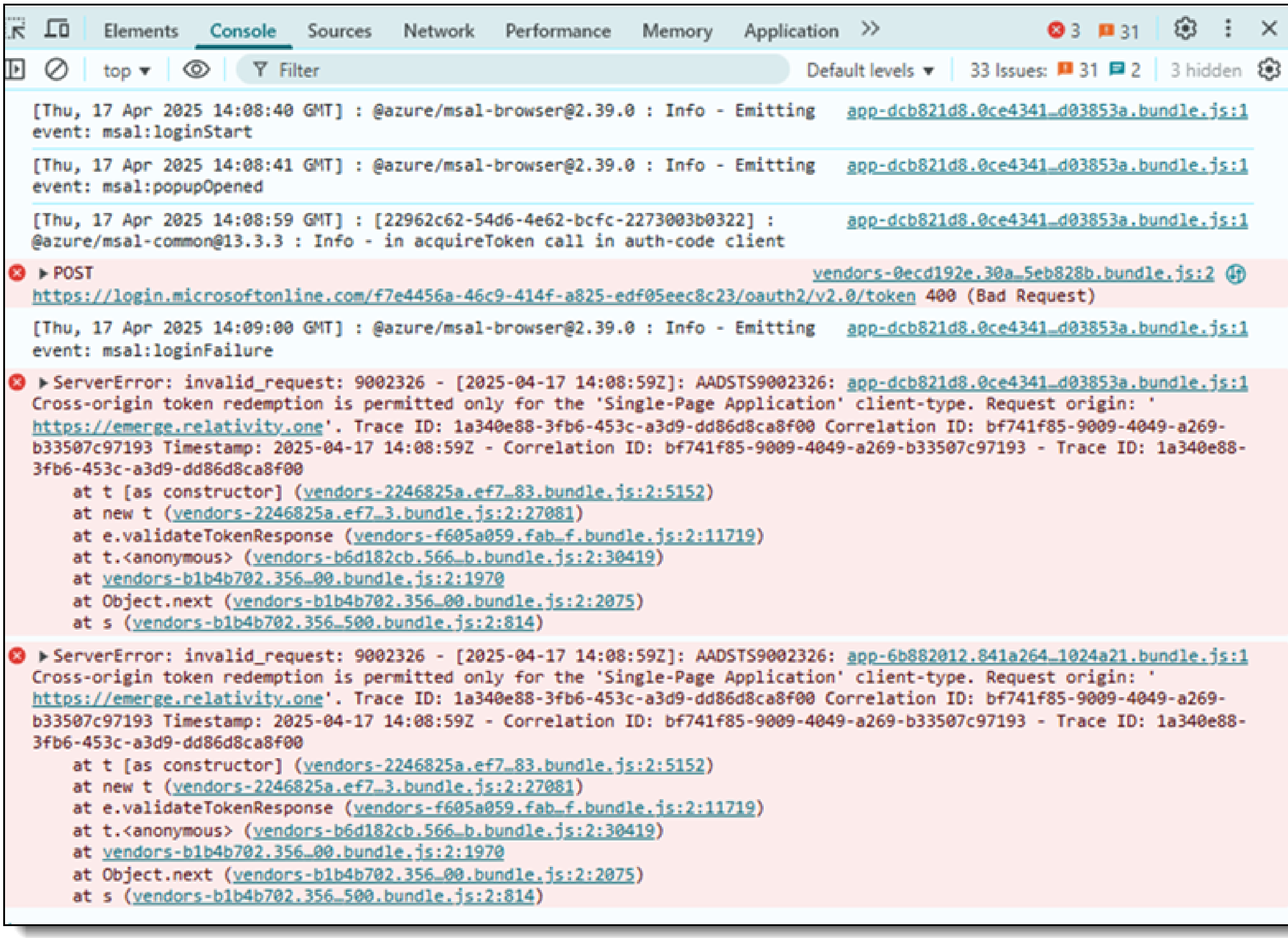
4. Check if you have Global Administrator role.

It might be that you will see information's about Eligible role assignment. In that case, please contact your Azure administrator.



User wants to Sign in (providing login, password) - Sign in pop-up window disappears.
Cause

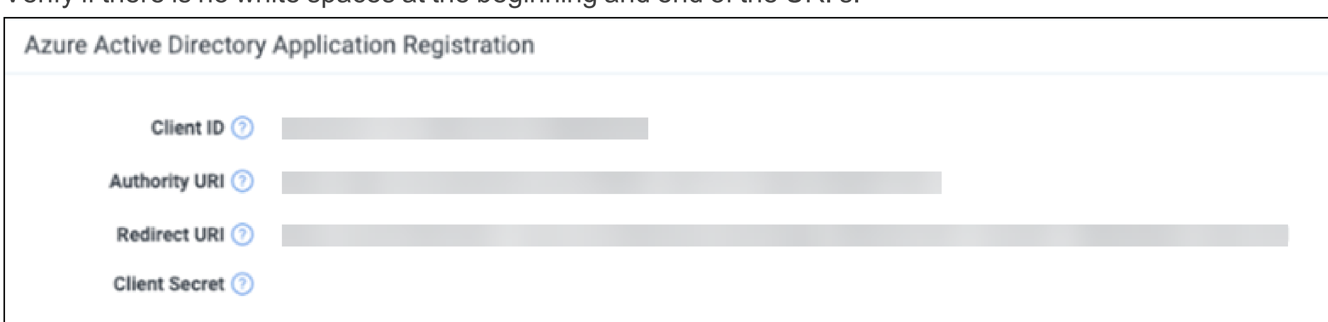
There is an issue with wrong character in URI. Open **Developer tools > Console**. Repeat reproduction step to check what you logged in. The console window can look like the following image:



Fix

To resolve this issue:

1. Navigate to **Purview Sync > Configuration**.
2. Verify if there is no white spaces at the beginning and end of the URI's.



3. Then navigate to **App Registration > Find your application > Authentication**.
4. Verify if *Web Redirect URIs* and *Single-page application Redirect URIs* contains correct URLs and verify if there are any spaces at the end or beginning of URI.

- Web Redirect URIs should contain {Company URI}/purview-sync-services/api/v1/AppConfiguration/auth-response.
- Single-page application Redirect URIs should contain {Company URI}/Relativity/CustomPages/f444a06a-617c-430b-90b2-a112e834b826/ms-auth-popup-redirect.html.

4.2 Considerations

Before using Purview Sync, consider the following:

- Ensure pop-us are not blocked in your browser as this would prevent Microsoft Authentication Library (MSAL) modal from appearing. If your browser is blocking pop-up windows, you will not be able to authorize with Microsoft.
- If you experience MSAL modal not appearing, or appearing for a short time, when logging in to start import of data in Purview Sync: clear your site data and then log out of Relativity and log in again. If you use Chrome, choose *Delete browsing data*.

5 Configure Purview Sync

After registering Purview Sync with Microsoft Azure AD, you need to configure and integrate Microsoft with Relativity.

5.1 Prerequisites

Before starting, you will need the following access in Microsoft 365:

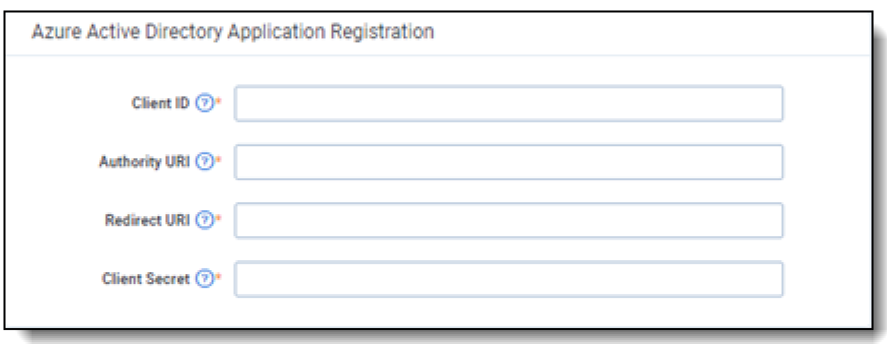
- Access to Azure Active Directory to create and update Application Registrations.
- A Microsoft 365 account with access to Purview eDiscovery Premium. Either eDiscovery Manger or eDiscovery Administrator.

For more information see, Register Purview Sync with Azure.

5.2 Configuring Purview Sync

To configure the connection between RelativityOne and Microsoft Purview eDiscovery Premium:

1. Navigate to the **Purview Sync > Configuration** tab.
2. Click the **Edit** button.
3. Enter your **Application (client) ID** in the Client ID field.
4. Enter **https://login.microsoftonline.com/[Tenant ID]**, where Tenant ID is the Directory (tenant) ID value in the Authority URI field.
5. Enter *https://[RelativityOne U RL up to the word relativity forward slash] + CustomPages/ 4985c522-5931-41ba-bf67-7d58ee96e6d1/index.html* in the **Redirect URI** field.
6. For example, *https://company.relativity.one/Relativity/CustomPages/4985c522-5931-41ba-bf67-7d58ee96e6d1/index.html*.
7. Enter the **Client Secret**.
8. Click **Save**.



Before utilizing the application, you must log into your account that has Microsoft Purview eDiscovery Premium access. Then click the **Validate** button. This will open a new browser tab. If successful, you will see the following text: "Authentication granted for export downloads. You may close this page."

If you do not see this text and see an error message, close the tab and try again. It could take a few tries before you see the success message.

This validation applies on an individual user level. Each user who would like to use the application will need to perform the Validate step before they are able to perform imports in the workspace.

After validation, navigate to the **Import** tab.

5.3 Testing the application

To effectively test the efficacy of the application for your workflows, make sure you've used a test Purview eDiscovery Premium Case Review Set to transfer to RelativityOne.

6 Importing data

To import data from Microsoft to RelativityOne using Purview Sync, you will need to have the application installed and configured properly. For more information, see Install Purview Sync.

6.1 Considerations

Before importing data, consider the following:

- You must create review sets in Microsoft before using Purview Sync. For more information, see Microsoft's documentation.

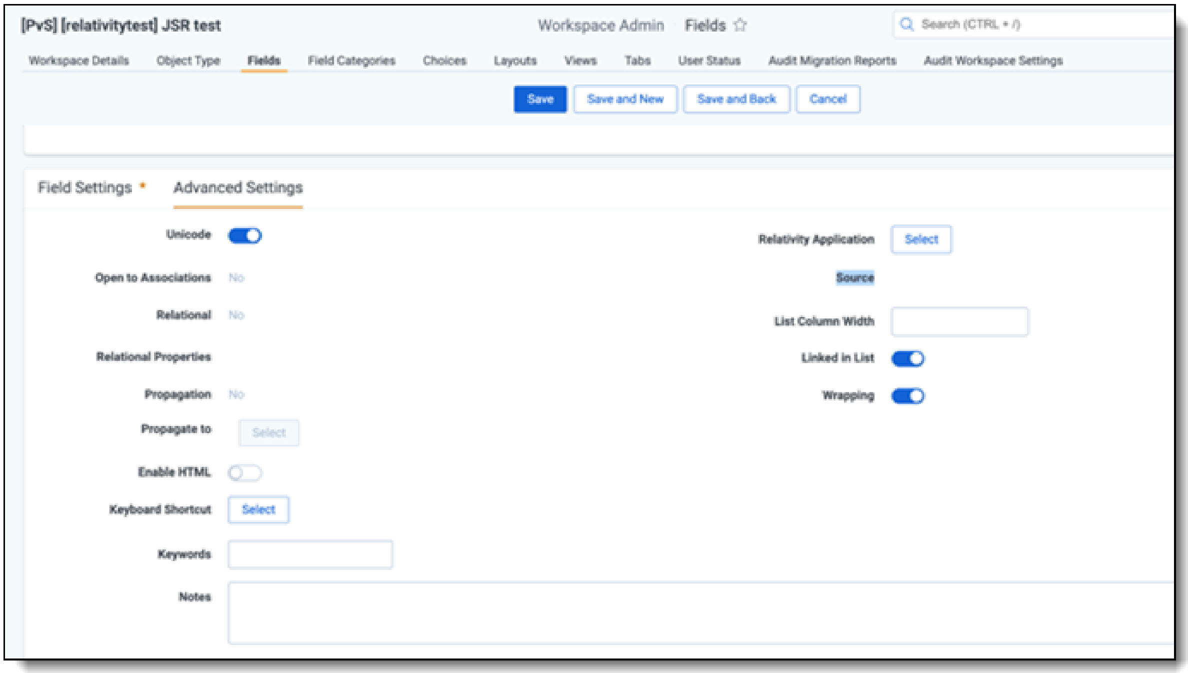
  Note: Microsoft recommends using review sets created after November 1, 2025, following their fix to the 'Custodian' column in the CSV loadfile. Prior to this, the column was empty. This fix applies only to review sets created after implementation. Please check Microsoft documentation for its loadfile metadata. To ensure accurate and defensible custodian data, Purview Sync will allow creating jobs only with new review sets (post-fix) and will not support jobs based on old review sets.

- You must install the Processing app in the same workspace that you installed Purview Sync. For more information, see Processing documentation.
  - In your processing profile, you must set the **Auto-publish set** field to *Yes*. For more information, see Processing documentation.
  - Setting the **Auto-publish set** to *Yes* automatically starts the publishing process after the completion of discovery.
- It is recommended to keep exports sizes below 100 GB. In cases where the data set is larger than 100 GB, it is recommended to create multiple review sets.
- Email attachments support: email attachments from Microsoft are received together with an email in a container and also as a loose file. The container and the loose file have separate identifiers in the Microsoft loadfile. That is why these attachments also appear as a part of a family and as loose files in Relativity.
- Copilot attachments support: due to Microsoft currently updating their support for Copilot, there might be issues with finding some attachments in Microsoft Purview, and thus we are unable to import those to Purview Sync.

6.2 Prerequisites

You must complete the following before running a Purview Sync job:

- The following fields are required in the workspace for successful completion of a Purview Sync job:
  - **Identifier** field—there must be one field with the *Identifier* property set to **Yes**.
    - Update the property setting in the workspace *Fields* > *Advanced Settings*.
    - The name of this field can be anything. For example, Control Number.



  - Purview Sync requires the following fields types in the workspace. Each with a specific Source value set as follows. Names of these fields can be anything:
    - **Control Number**
    - **File Name**
    - **Source Path**
    - **MD5 Hash**
    - **SHA256 Hash**
  - You must enable all required processing fields for Purview Sync.
    - For example, the *Level* and *Virtual Path* fields.
    - For more information on required Processing fields, see Mapping processing fields. For more information, see the Processing guide.
- For the metadata overlay purposes, you must have fields added to your workspace that would match column headers from the Microsoft load file. For more information, see Automatic overlay and using Microsoft fields on page 41.
- Purview Sync automatically creates job names based on the name of their Review Set and the date of creation, unless you create your own job name.
  - If you create two jobs the same day using the same Review Set, Purview Sync will add all the files to the same folder.
  - We recommend distinguishing these jobs with naming them in a different way.

6.3 Setting up review sets in Microsoft

You must have review sets already created in Microsoft Purview. To set up a review set in Microsoft, see [Microsoft's documentation](#).

You can add any M365 data to your review set in Purview, and Purview Sync will import the entire review set at once.

You can import one review set per one Purview Sync job.

If you apply filters to your review set, they are not respected in the export process of your data to Relativity. For example, data is transferred as if filters were not applied.

6.4 Importing

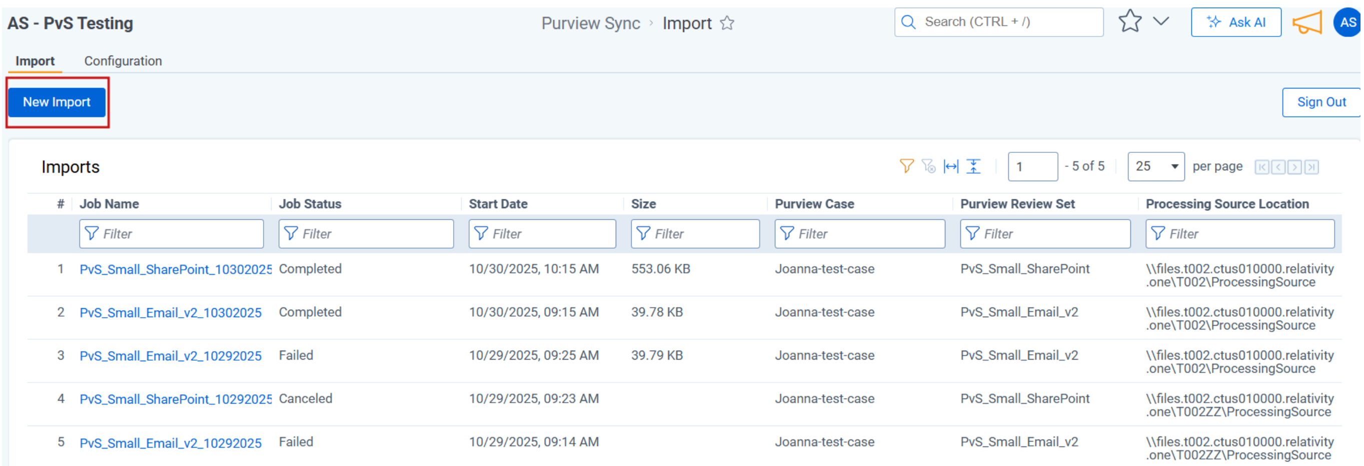
After you initiate import of data from Microsoft Purview to Relativity, the process starts with an export of your review set from Microsoft Purview.

Data is exported in the condensed directory structure format. Emails are exported as MSG files.

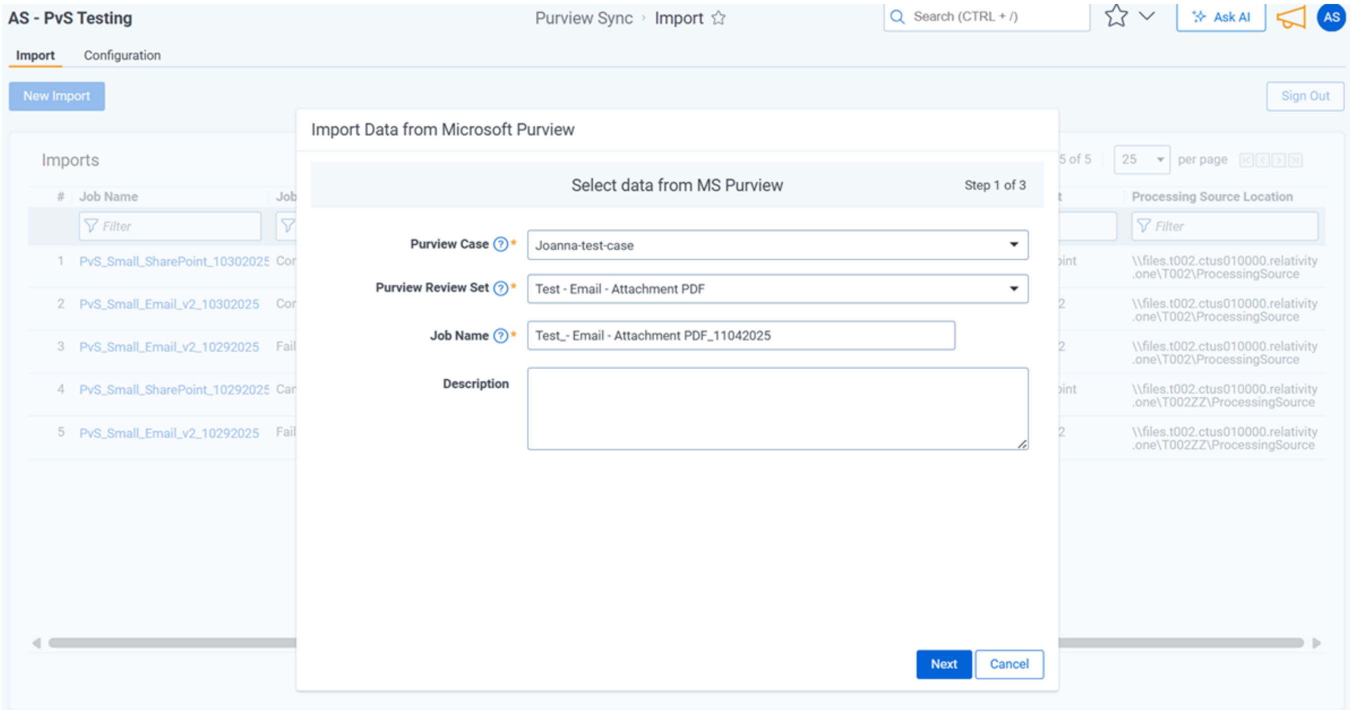
Data is exported as archives containing native files, or raw files, and a load file. The load file includes additional metadata in MS format from the Microsoft server. This data is then sent to the processing source location you selected during the import process of files from Microsoft Purview to Relativity.

To import the review sets from Microsoft to the RelativityOne,

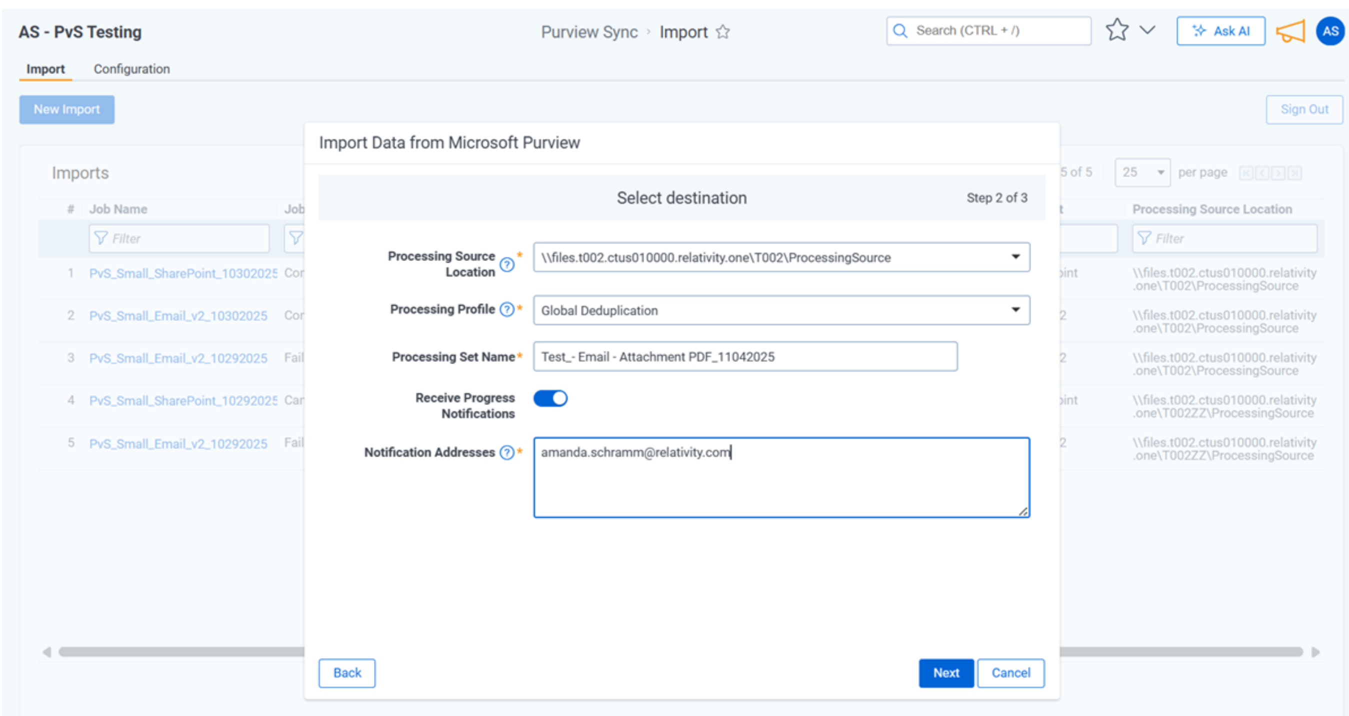
1. Navigate to Import tab.
2. Select **New Import** button in the upper left corner.



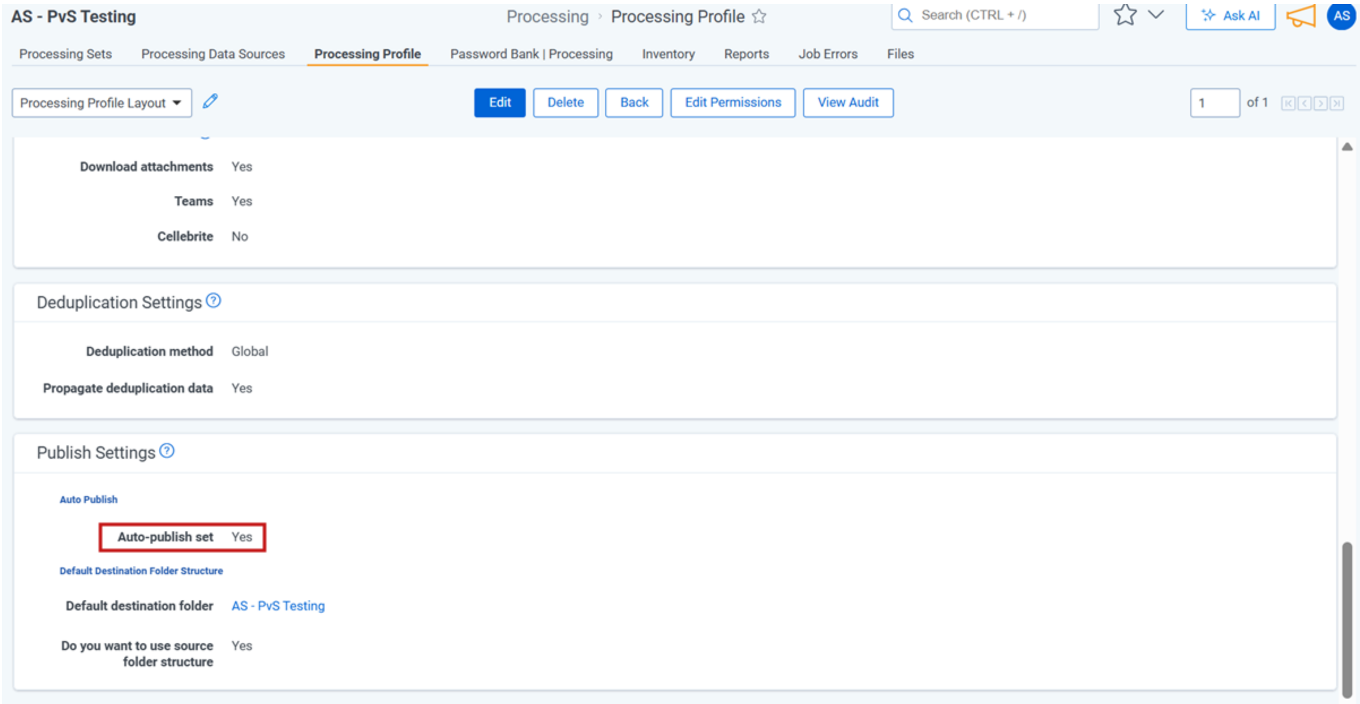
3. Select Purview Case and Purview Review Set. Optionally, update the Job Name and add a Job Description. Click **Next**. For more information, see Import fields on page 36.



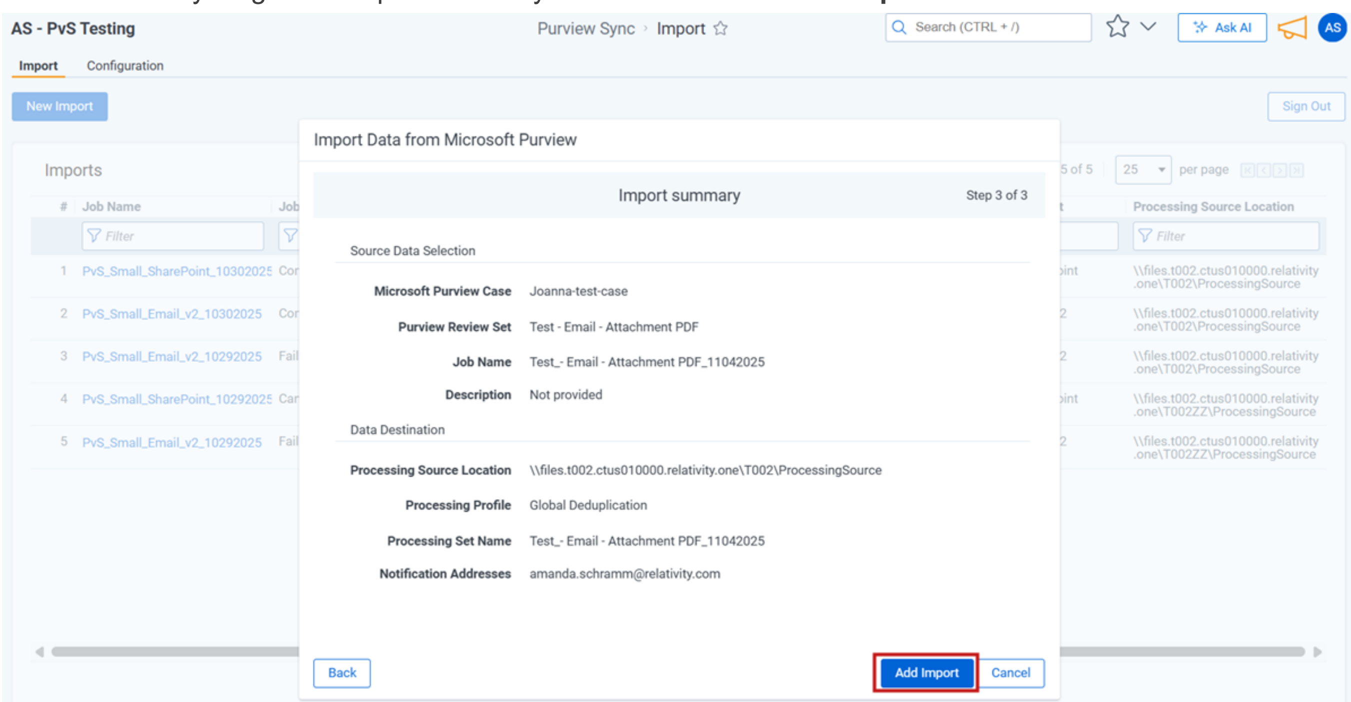
4. Choose your Processing Source Location and Processing Profile. Optionally, update the Processing Set Name, select Receive Progress Notifications, and enter any relevant email addresses to receive notifications. Click **Next**.



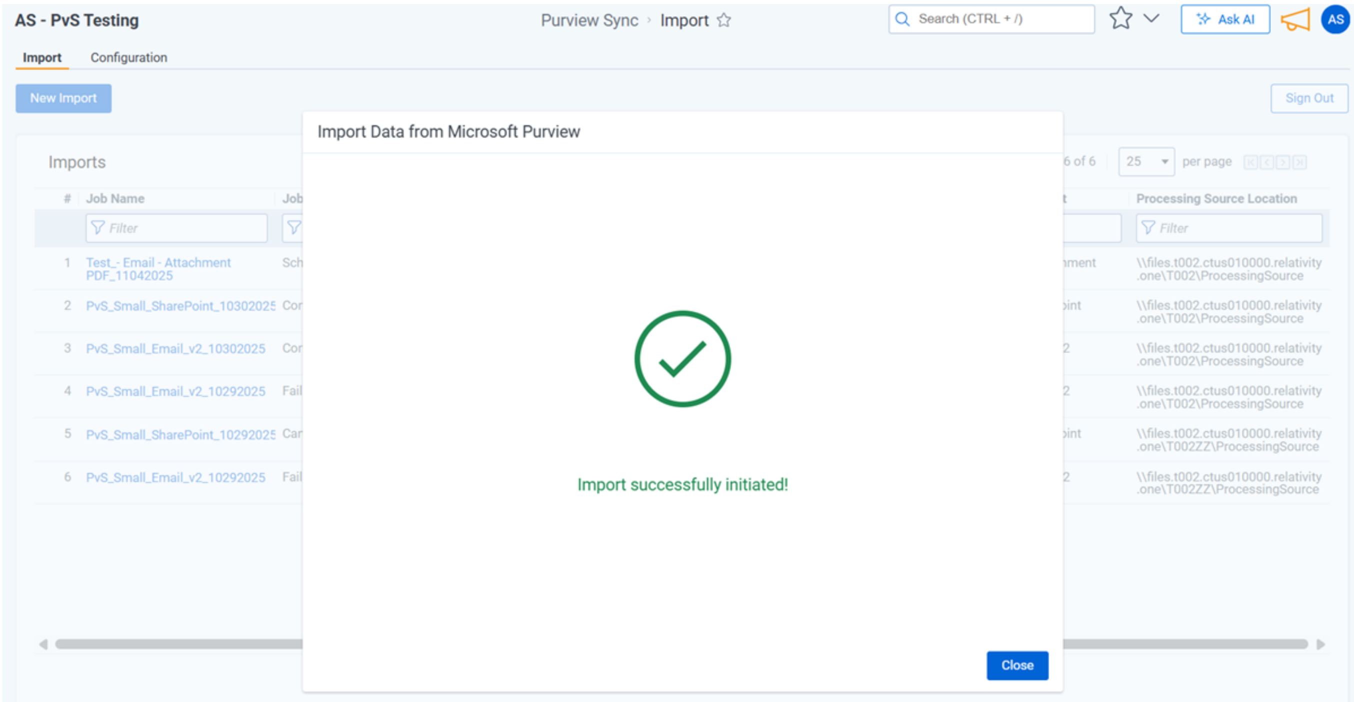
Note: Make sure your Processing Profile has Auto-Publish set to Yes.



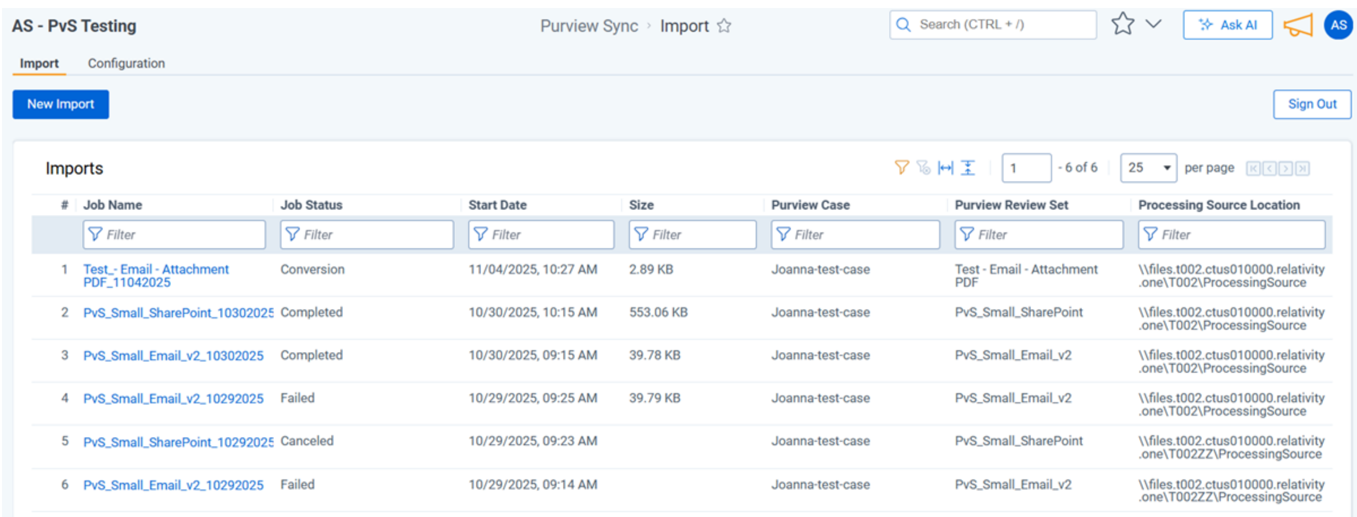
5. Make sure everything in the Import summary is correct and click **Add Import**.



The **Import Successfully Initiated** window pops up.



6. The job will appear under Imports where you can view Job Name, Job Status, Start Date, Size, Purview Case, Purview Review Set, and Processing Source Location.



6.4.1 Import fields

The list contains the fields you need to enter information in when importing.

- **Purview Case**—select the case from Microsoft eDiscovery Premium that you want to import.
- **Purview Review Set**—select the review set from Microsoft eDiscovery Premium that you want to import.
- **Job Name**—enter the name of your job or leave it autopopulated by Purview Sync.
- **Description** (Optional)—enter a description of the case and set.

6.4.2 Processing fields

Within Processing, the two jobs are discover and publish. For more information, see Processing documentation.

To set up processing:

- **Processing Source Location**—select the file repository for collected data to be stored for future processing of documents or for storing collected data.For more information, see Processing documentation.
- **Processing Profile**—select a processing profile available in the drop-down menu. The available profiles are from the selected workspace.
  - You must have the Processing app installed on the workspace you are using
  - You must have the **Auto-publish set** in your processing profile set to *Yes*.
  - All data in a completed collection or completed with errors collection will be processed after collection is complete.
- **Processing Set Name**—the name defaults to the Export Name in the Import step. You can also edit it for a custom name.

6.5 Imports list

The imports list page includes the Purview imports you added to Relativity. The list includes the data you entered such as job name, Purview Case, Review Set, and Processing Source Location. It also includes imported data such as Status, Date, and Size.

Note: You must log in to Microsoft to see the import list.

The Imports list page provides a high-level overview of all created imports. In the import list, you will see the following information:

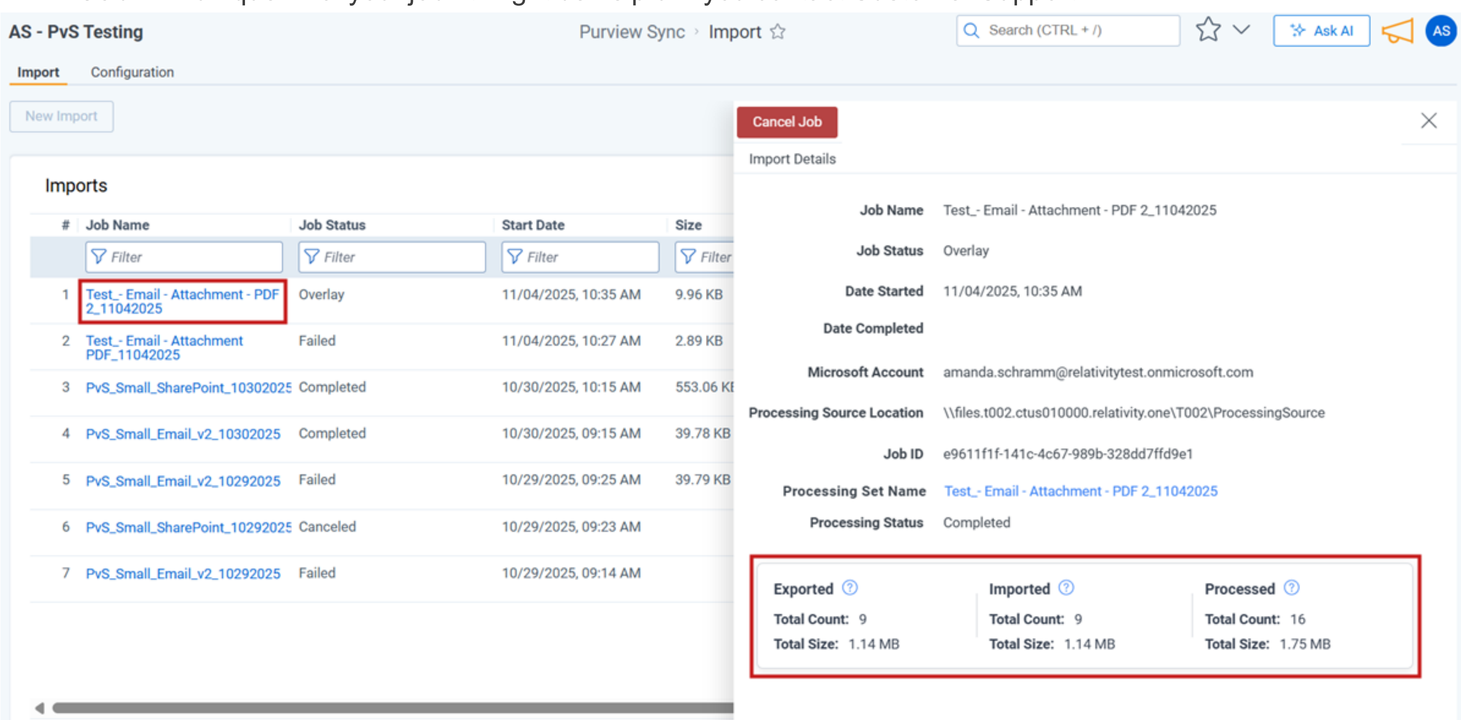
- **Job name**—the name given to the export while creating your job in Purview Sync.
- **Status**—the status of the import job. In the Status column, you can see different statuses:
  - **Scheduled**—your job has been initiated.
  - **Export**—export of your data. Then the data is downloaded as zipped files from Relativity and extracted from zips.
  - **Conversion**—automatic conversion from HTML into RSMF (Relativity Short Message Format) is taking place.
  - **Processing**—data is being processed in Relativity.
  - **Overlay**—automatically updates existing records in the review workspace by merging or replacing data from the source with corresponding fields in the workspace.
  - **Completed**—all data is collected and in Relativity.
  - **Failed**—your job has failed. View the error description and code in the Import Details slide-out page (see below).
- **Start Date**—value is what the time stamp is when Relativity starts the import. Stored in UTC. Displayed in local time.
- **Size**—the size of the export before processing in its compressed size.
- **Purview Case**—the eDiscovery Premium case created in Microsoft Purview. This is similar to a workspace.
- **Purview Review Set**—the data set created in Microsoft Purview.

- **Processing Source Location**—the file repository for collected data to be stored for future processing of documents or for storing collected data. Click on the processing set name to go to the workspace with the processing set.

6.6 Import details

Click a job name to see the Import Details slide-out page. On the *Import Details* page, you can see the following information:

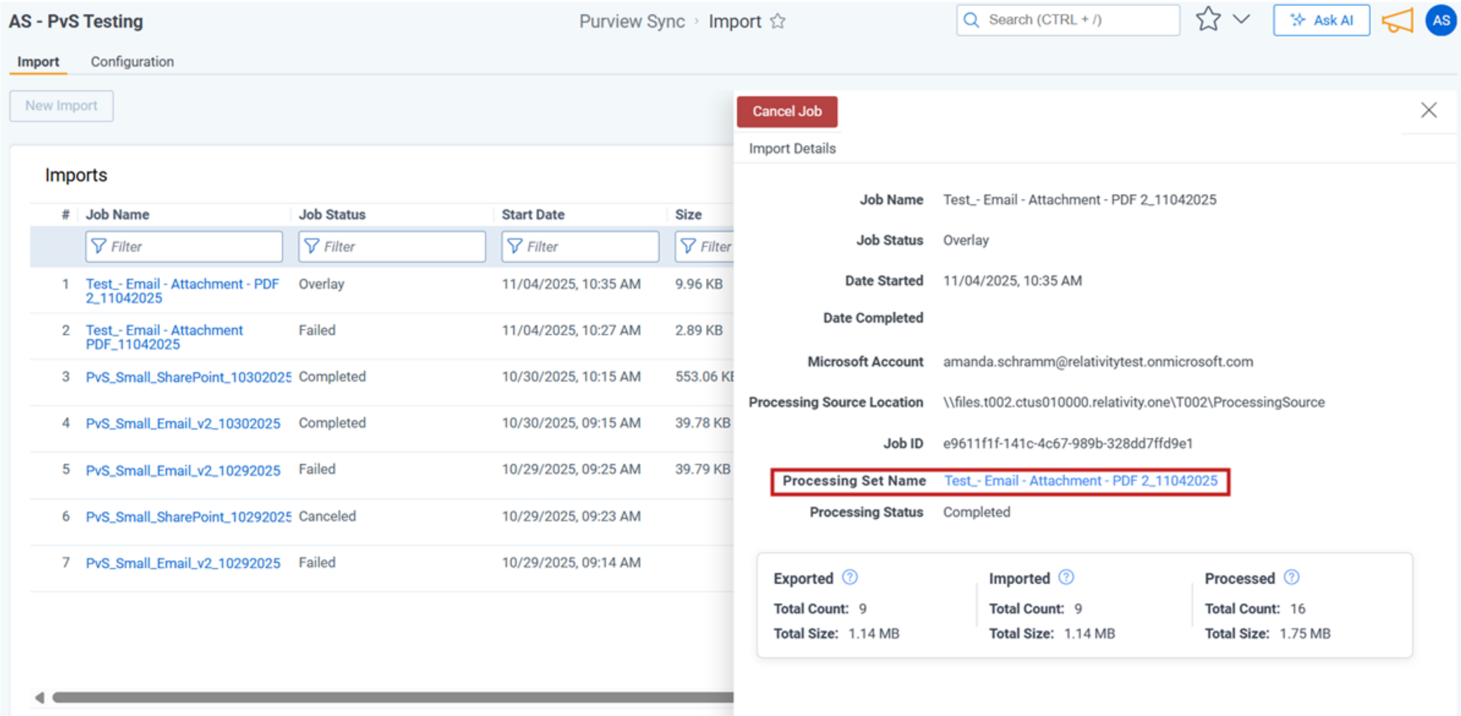
- **Job Name**—the name of the job. By default, this is the Review Set name and date created.
- **Error Details**—short error description and code of the error.
- **Job Status**—the status of the import job.
- **Date Start**—lists the date and time Relativity started importing data.
- **Date Completed**—lists the date and time Relativity completed the import. When the job is not yet completed, the column shows *To be determined*.
- **Microsoft Account**—lists the user's Microsoft email address.
- **Processing Source Location**—lists the file repository that collected data is stored for future processing of documents or for storing collected data.For more information, see Processing documentation.
- **Job ID**—unique ID of your job. It might be helpful if you contact Customer Support.

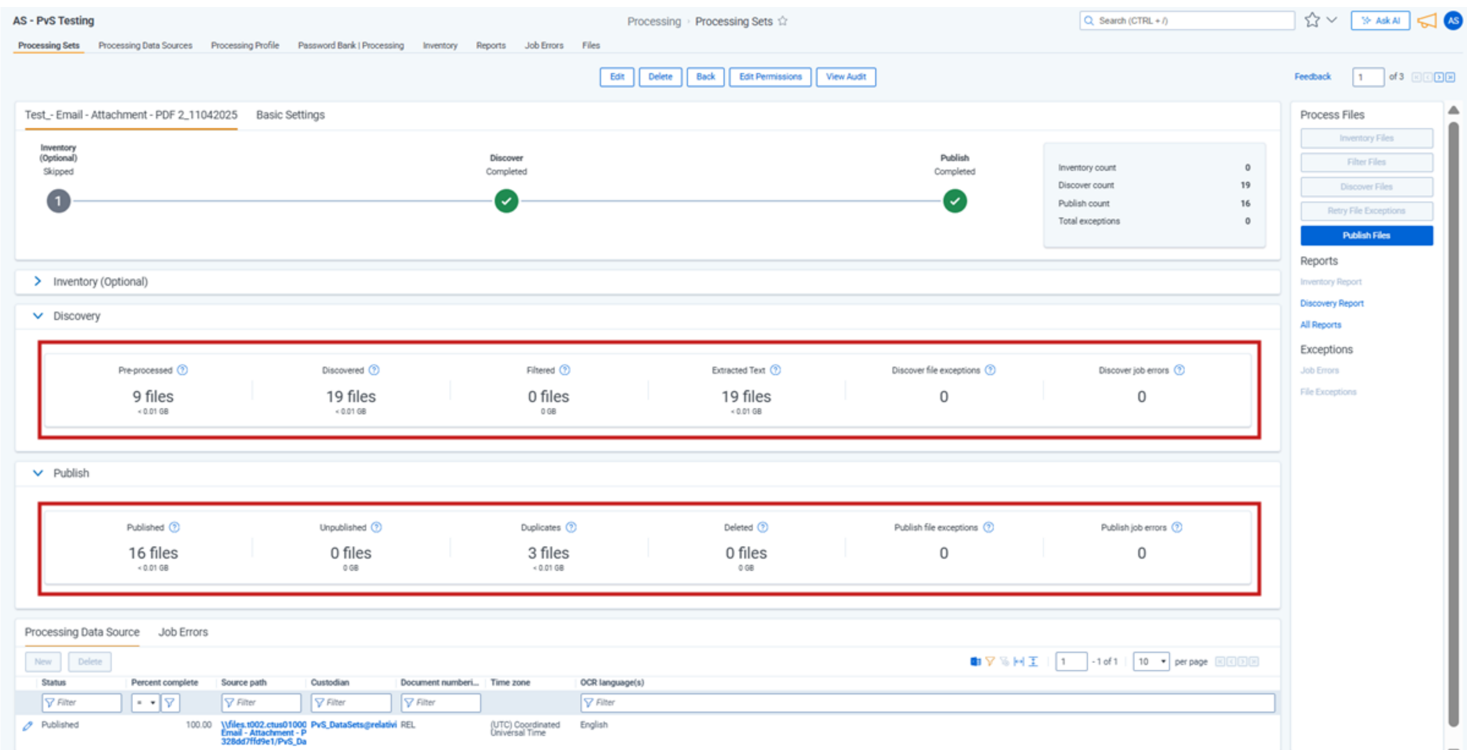


Underneath these job details, you can find details of a Processing Set:

- **Processing Set name**—after clicking into it, you get directed to the Processing app in Relativity, where you can see all details of the processing of your job.
- **Workspace**—name of the workspace where your processing set is.
- **Processing Status**—status of the processing part of your job. It might be different from the Job Status visible on the Imports List.

Select Processing Set Name to view specific processing details and any errors.





6.7 Cancel and retry job

You can cancel a Purview Sync job at any time after it has been created, except when the job has already finished (Completed status) or has failed (Failed status).

You can retry a Purview Sync job after it has failed (Failed status). When retried, Purview Sync will resume processing from the point where the job stopped, except for the Conversion stage of the job.

7 Data transformation

Purview Sync automatically transforms Microsoft Purview exports into formats optimized for Relativity, removing the need for manual preparation or conversion. The application retrieves data directly through the Microsoft Graph API and processes it into review-ready formats such as Relativity Short Message Format (RSMF) for Teams conversations and HTML for other supported content types.

The workflow also normalizes and validates the data before passing it to Relativity Processing, so users can rely on a seamless and accurate transfer of information from Purview into Relativity.

As part of the transformation, Purview Sync organizes files by custodian and applies Microsoft-supplied metadata to each item, ensuring consistency, defensibility, and richer context for downstream review.

7.1 Processing custodians

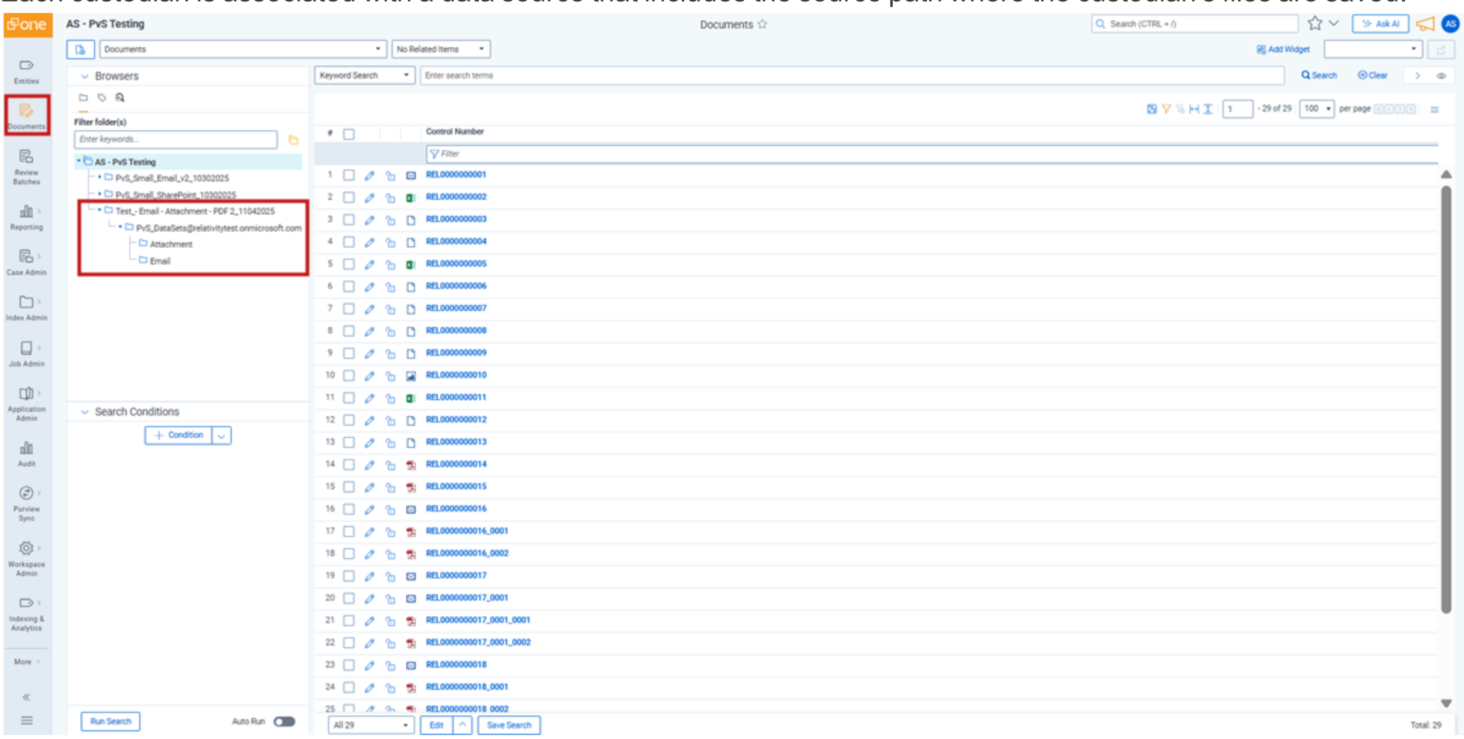
Purview Sync automatically organizes all imported files by custodians, with custodian definitions derived from the load file imported from Microsoft Purview. Thus, custodians are defined by their emails in Purview Sync too.

Note: Starting November 2025, Microsoft implemented a fix to the ‘Custodian’ column in the CSV loadfile. Prior to this, the column was empty. Therefore, it is recommended to use review sets created after this date to ensure custodial information is accurate and defensible. For more details, see Considerations.

Custodians are automatically created by Purview Sync. You can find them after clicking into the Documents tab.

- When custodian is defined in Microsoft Purview, and present in the load file, their email is displayed in Purview Sync under the name of a job.
- When custodian is not defined in Microsoft Purview, job name is displayed in Purview Sync.

Each custodian is associated with a data source that includes the source path where the custodian's files are saved.



7.2 Automatic overlay and using Microsoft fields

Overlay in Purview Sync updates existing records in the review workspace by merging or replacing data from the source with corresponding fields in the workspace, based on the fields already existing in the Microsoft Purview load file.

Microsoft Purview creates an export object containing native files alongside a load file that holds all metadata information. Once Relativity processes the files into the workspace, Purview Sync overlays them with metadata from the load file, assuming that the workspace has the necessary fields created. These fields must match the column names in the load file exactly. Purview Sync will not create them automatically.

When creating the metadata fields in RelativityOne for overlay, we recommend referring to Microsoft documentation.

7.3 Relativity Short Messaging File conversion

We automatically convert HTML Teams data into Relativity Short Messaging File (RSMF).

Teams formats supported by Purview Sync are:

Teams format	Support	Details
Single chat between two users	Supported	
Group chat with three or more people	Supported	
Messages in Teams and channels	Supported	
Threads	Supported	
Deleted threads	Supported	In Teams, when a thread is deleted, only the top, or root, message is deleted. The replies retain their structure. In Purview Sync, they are classified as *Orphaned Replies* and marked deleted.
Deleted and edited messages	Supported	
Attachments	Supported	
Channels	Supported	
Deleted chat	Supported	
User leaving team	Supported	
User deleted	Supported	
Archived channel	Supported	
Add removed user back to chat	Supported	
Tag in chat	Partially supported	RSMF file is created but tags are not handled correctly.
Tag in channel	Supported	Everything works

Teams format	Support	Details
		but nothing indicates it is a tag, the same as in Purview.
Reply in chat	Supported	
Channel name change	Supported	
Forwarded message	Supported	RSMF is properly generated with user and message. Following the same behavior in Microsoft Purview, it does not indicate that someone forwarded the message.
Chat with picture	Supported	
Chat with shared M365 docs	Supported	
Links to external sources	Partially supported	RSMF is properly generated, but links are normal text, which is an expected behavior across Relativity.
Chat from audio, video, meeting	Unsupported	
Automatically created meeting recording	Unsupported	
Scheduled messages	Supported	Relativity generates the data as RSMF with user and message. Following the same behavior in Microsoft Purview, it is not indicated that someone scheduled the message.
Translated messages	Supported	Relativity generates the data as RSMF with user and message. Following the same behavior in Microsoft Purview, only in original language.

Teams format	Support	Details
Modern attachments	Teams - Supporteds Email - Partially supported	• Teams chats: supported. Both teams chats and their linked attachments are imported and converted to RSMF; a proper family relation is created between the parent Teams chat and its child attachment. • Emails: partially supported. Both parent email and its linked attachment are imported and converted to RSMF but Purview Sync does not currently establish a family relation between the email and its attachment.
Different alphabets	Unsupported	RSMF file is created, but there is lack of proper UTF8 support.
Loops	Partially supported	Both the Teams chat and its associated Loop file are imported by Purview Sync. The Teams chat is converted into RSMF, while the Loop file

Teams format	Support	Details
		remains in HTML format.
Cards	Partially supported	Both the Teams chat and its associated Card file are imported by Purview Sync. The Teams chat is converted into RSMF, while the Card file remains in HTML format.
Whiteboard	Partially supported	Both the Teams chat and its associated Whiteboard file are imported by Purview Sync. The Teams chat is converted into RSMF, while the Whiteboard file remains in HTML format.
Viva Engage (formerly Yammer)	Partially supported	Both the Teams chat and its associated Viva Engage file are imported by Purview Sync. Both remain in HTML format.
Fluid	Unsupported	

Copilot formats supported by Purview Sync are:

Teams format	Support	Details
Simple copilot conversation	Supported	
Emojis	Supported	
Annotations	Supported	Annotated links are visible in text.
Attachments	Supported	