RelativityOne

RelativityOne Purview Sync

March 18, 2026

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.

If you are trying to decide between using Purview Sync or Collect, see Choosing to use Purview Sync or Collect on page 5.

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.
- A Microsoft 365 account with access to Purview eDiscovery Premium. Either *eDiscovery Manager* or *eDiscovery Administrator*.

To use Purview Sync, you must:

1. Register an application with Microsoft Purview eDiscovery (Premium).
2. Update Azure permissions.
3. Connect RelativityOne to Microsoft Purview eDiscovery.

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, or a related E5 add-on subscription for anyone collecting.

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.

One of the following licenses are required for Purview Sync:

- 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 is what is supported for particular formats:

Item/Format	Support status	What this means
Teams (Short Messaging Format – RSMF)	*Supported*	Teams chats and all linked modern attachments are imported and converted to RSMF. A proper family relationship is created between the chat (parent) and attachment (child). For more inform-

Item/Format	Support status	What this means
		ation, see Relativity Short Messaging File conversion on page 38.
Emails with modern attachments	*Partially Supported*	Both the email and its linked attachment are imported and converted to RSMF. However, Purview Sync does not currently create a family relationship between the email and its attachment.
Sensitivity labels, retention labels, tags, and other Microsoft Purview labels	*Supported*	Any labels included in the Purview load file are imported into Relativity. Sensitivity Labels are exported as GUIDs, not display values—this is expected and confirmed by Microsoft.
Text redacted in Microsoft Purview	*Unsupported*	Redacted text is not included in the Microsoft load file, so Purview Sync cannot import it.
Cards, Viva Engage, Loop components	*Partially Supported*	These items are imported with limitations. See Relativity Short Messaging File conversion for details.
Fluid and Whiteboard messages	*Unsupported*	These message types are not currently imported or converted by Purview Sync.

1.3 Choosing to use Purview Sync or Collect

There are differences to consider when choosing to use Purview Sync or Collect. Use the following table to select the best application to import Microsoft 365 data into RelativityOne:

Category	Purview Sync	Collect
Primary use case	Used when organizations use Microsoft Purview Premium and want to import full Review Sets.	Used to locate and collect M365, GCC, and GCC High data directly into RelativityOne without Purview.
Data sources and importing	Imports entire Review Sets from Microsoft Purview.	Collects data directly from Microsoft sources using built-in connectors.
Licensing requirements	Requires Microsoft Purview Premium.	Most workflows supported with M365/GCC E3. Teams collections require E5.
Permissions For more information, see **Delegated and application permissions on the next page**.	Uses delegated permissions. Access limited to the signed-in user's permissions.	Uses application permissions. Provides tenant-level access.
Inactive mailboxes For more information, see, **Inactive and archived mailboxes on the next page**.	Supported.	Not supported.
Archived mailboxes For more information, see, **Inactive and archived mailboxes on the next page**.	Supports archived mailboxes.	Supports online archived mailboxes via EWS.

Category	Purview Sync	Collect
Best fit	Organizations already invested in Purview Premium workflows and Review Set–based collection.	Organizations needing direct collection from M365/GCC into RelativityOne without Purview dependency.

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.

1.3.3 Teams data

Collect uses the Teams API endpoints.

- The Teams export does not currently support access to preserved Teams chat messages.
- This endpoint does not navigate to recoverable items folders. For example, the SubstrateHold folder.

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 Transfe**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. For more information on Microsoft Graph API, see Microsoft's documentation.

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.

To access the API, you must register an application in Azure Active Directory. Authentication requires referencing a dedicated Azure AD application that has the necessary permissions. This configuration must be performed on the client side by an Azure user with sufficient administrative rights.

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:

- **Automated script**. Run a PowerShell script as an Azure administrator. This script will create the app registration and configure all required permissions automatically.
- **Manual setup**. Sign in to the Azure portal as an administrator and complete the app registration manually, including assigning the necessary permissions.

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.

When registering the Purview Sync app in Azure:

- **Authority URI** specifies the Microsoft tenant that handles authentication. It ensures sign-in is processed by your organization's trusted identity provider—Microsoft Entra ID.
- **Redirect URI** defines the secure endpoint where Microsoft sends the authentication response after sign-in. This allows Purview Sync to receive authorization tokens and complete the login process.

After completing the app registration process, whether automated or manual, collect the final values required for configuring RelativityOne Purview Sync. Store these values securely for future use. The following are examples of those values:

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

3.1.1 Requirements

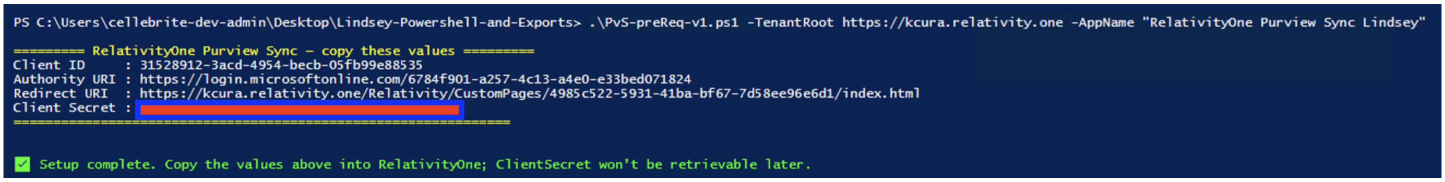
You must have the following before automating the Purview Sync registration:

- 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.

3.1.2 Automating the registration

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.

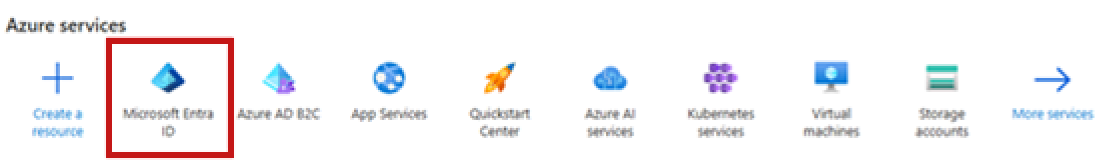
3.2 Registering an Azure application and credentials manually

Complete the steps in this section to create an app registration for email integration and syncing with Microsoft Entra ID.

To generate your Application (Client) ID and Client Secret, you must have Application Administrator privileges to sign in to the Azure portal and register the application. Store the Application ID and Client Secret securely, as you will need them in RelativityOne.

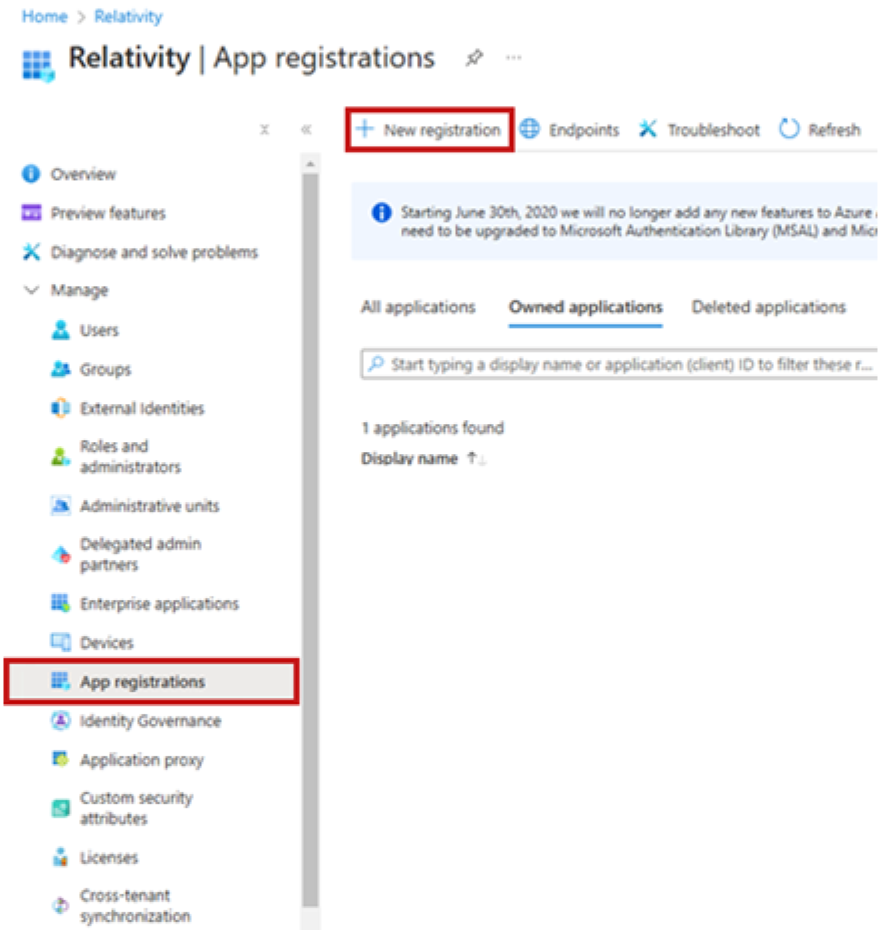
To register your app:

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.

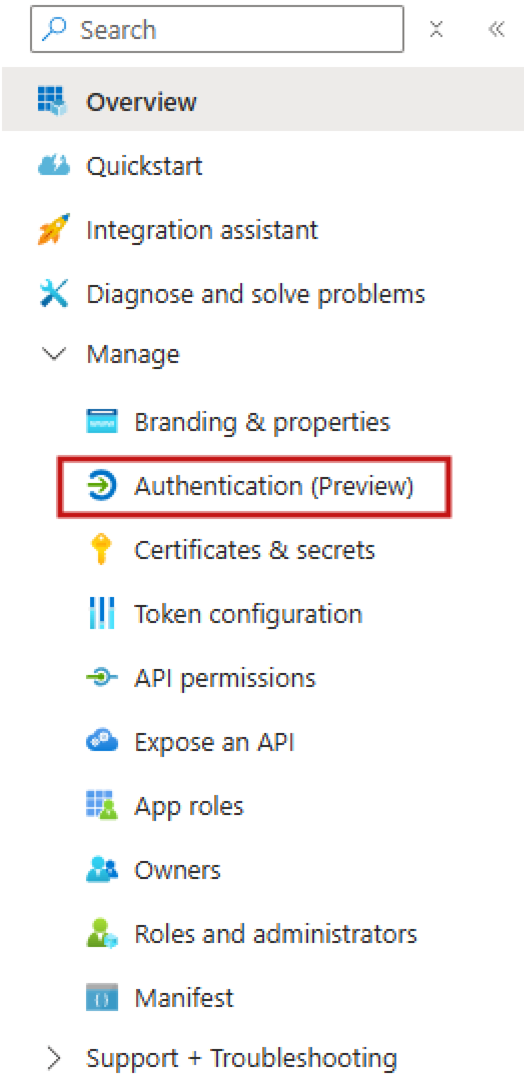
For more information on registering an application in the Azure portal, refer to documentation on Microsoft's site.

3.2.1 Authentication

For authentication, you must add a *redirect URI*. This allows Purview Sync to receive authorization tokens from Microsoft and complete the login process.

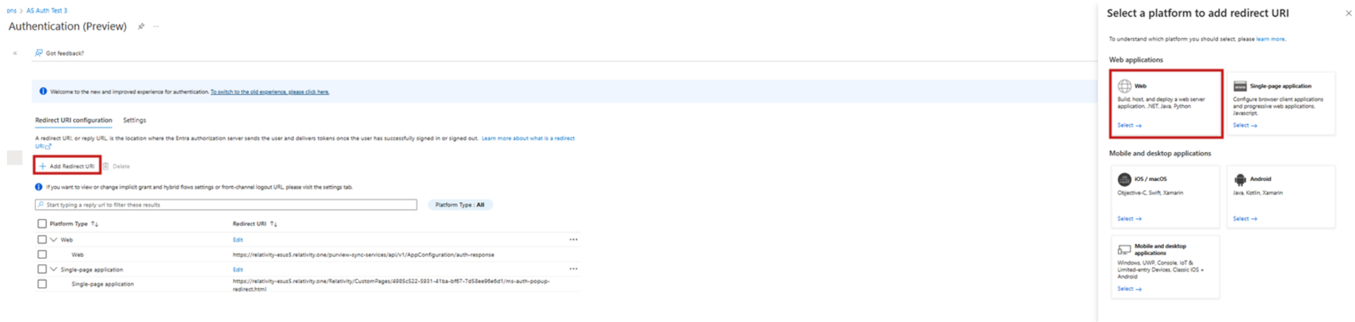
To add a redirect URI:

1. Select **Authentication (Preview)** from the left-side menu.



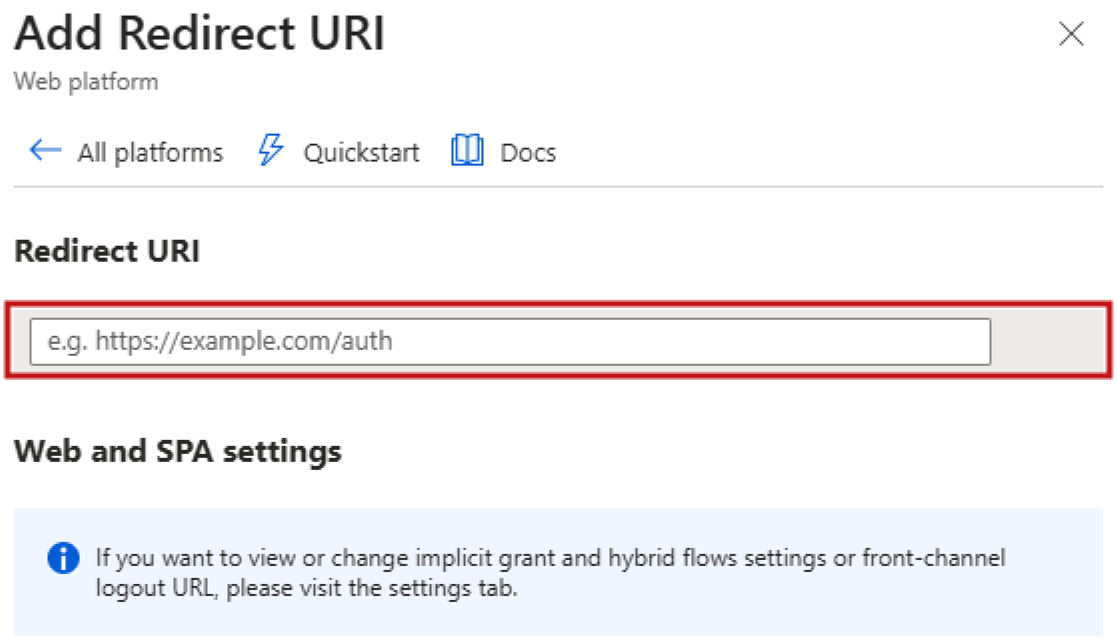
2. Locate the **Single-page application** box and select **Add URI**.
3. In the **Redirect URI** field, enter *https://[RelativityOne URL up to the word relativity forward slash]* + *CustomPages/ 4985c522-5931-41ba-bf67-7d58ee96e6d1/ms-auth-popup-redirect.html*. For example, *https://company.relativity.one/Relativity/CustomPages/4985c522-5931-41ba-bf67-7d58ee96e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

Notes: If you do not see the Web box, you need to create a new platform. Select **Add Redirect URI** and then select **Web platform**. Then, continue to step 5.

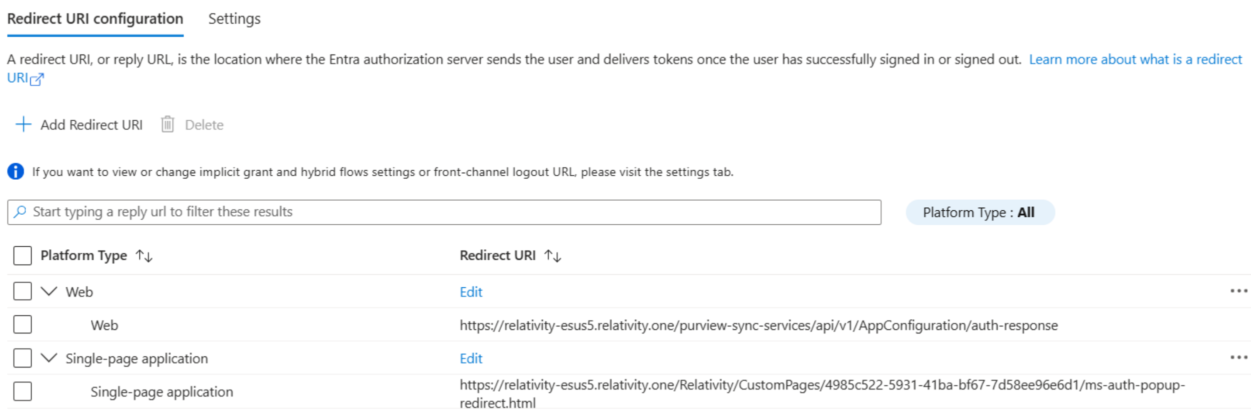


5. In the **Redirect URI** field, enter *https://[RelativityOne URL without including the word relativity forward slash]* + *purview-sync-services/api/v1/AppConfiguration/auth-response*. For example, *https://-*

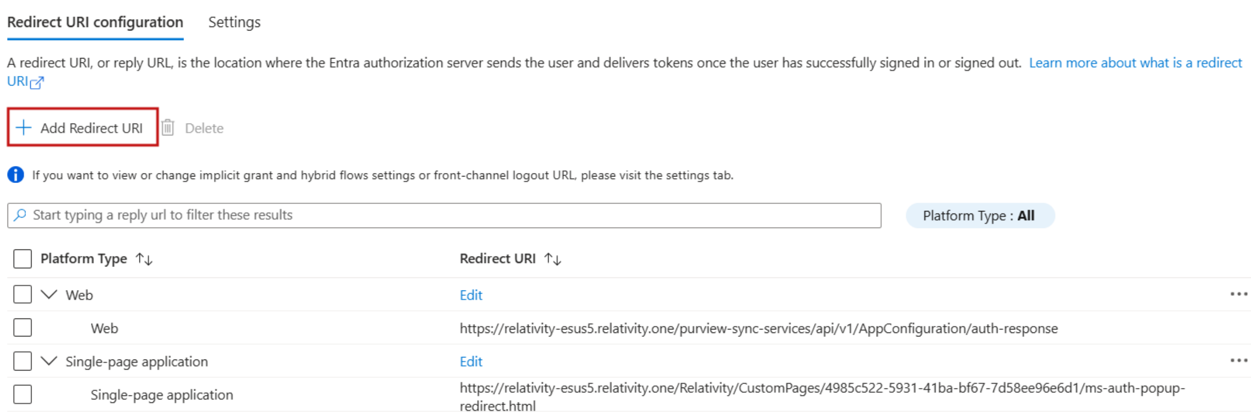
company.relativity.one/purview-sync-services/api/v1/AppConfiguration/auth-response.


Add Redirect URI
Web platform
All platforms
Quickstart
Docs
Redirect URI
e.g. https://example.com/auth
Web and SPA settings
If you want to view or change implicit grant and hybrid flows settings or front-channel logout URL, please visit the settings tab.

6. Click **Save**. Exemplary added URIs look as follows.



7. If you plan to use the same app registration on another tenant, add another two corresponding redirect URIs—Single-page URI and Web URI—for that tenant in this section.



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.

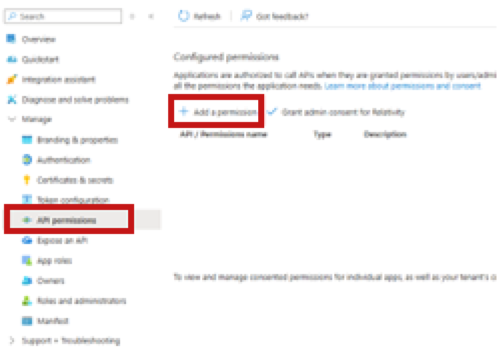
You can repeat steps 4-5 to generate a new client secret.

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.

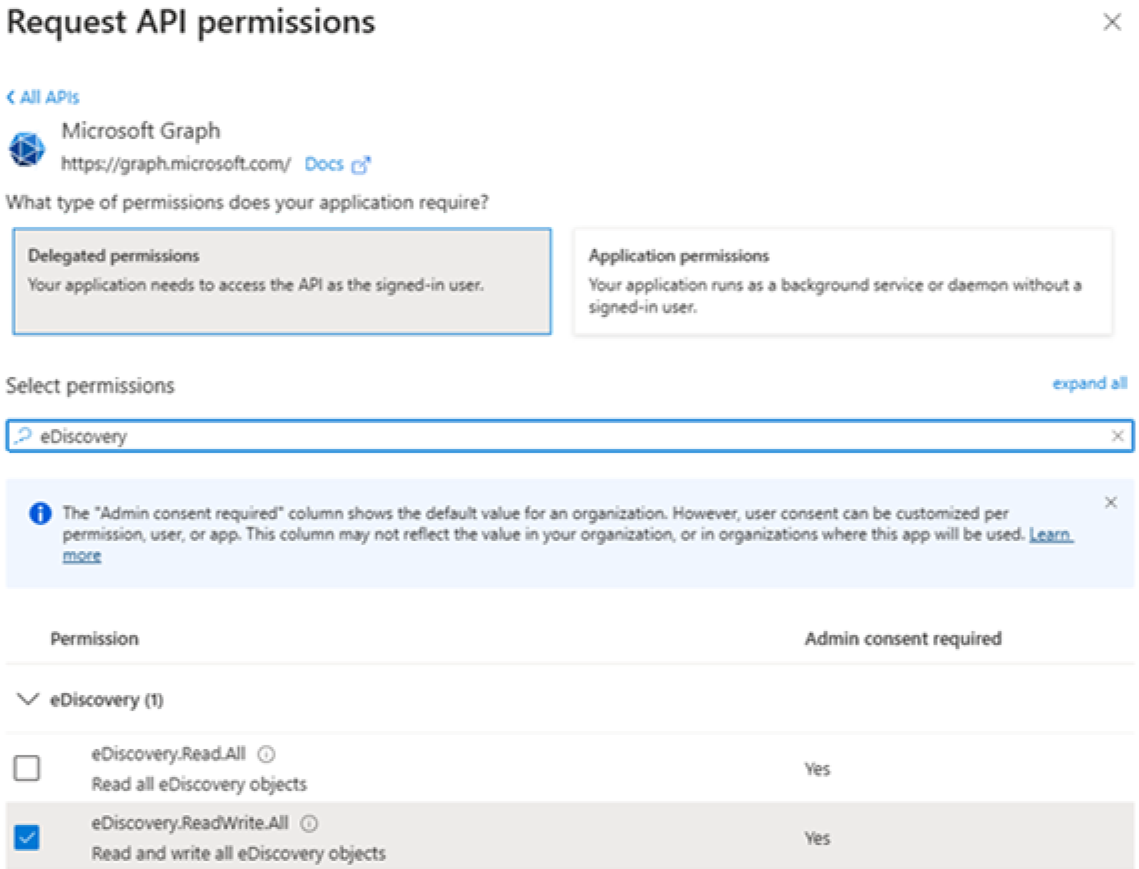
To add permissions:

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.

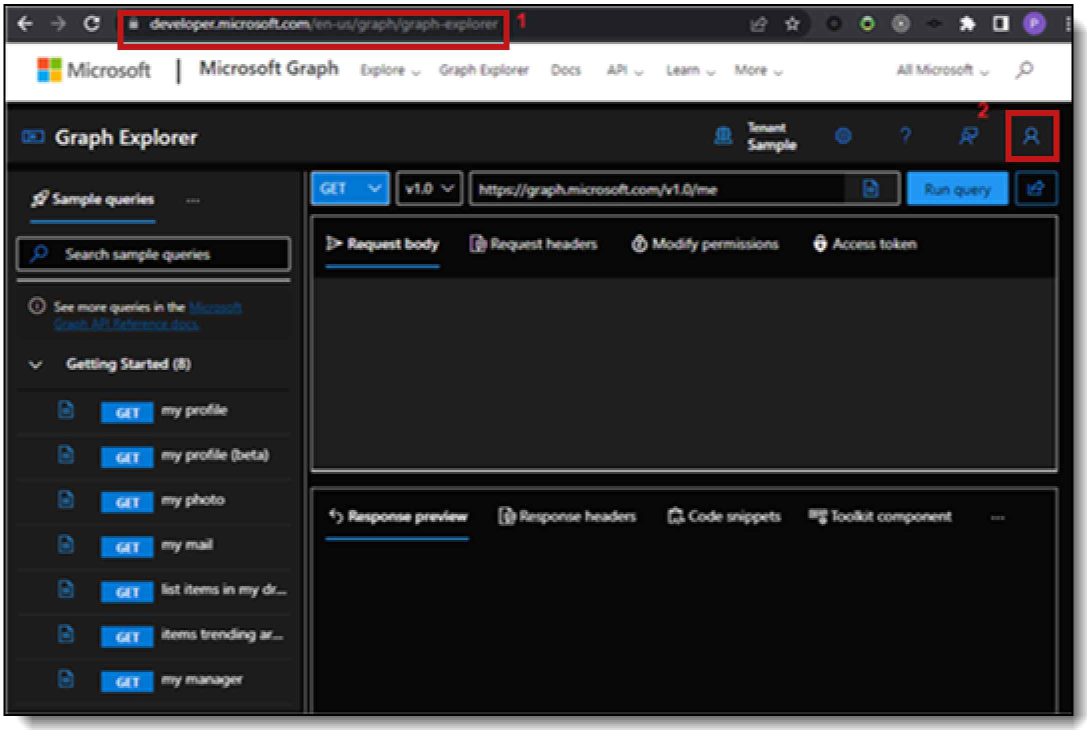
We recommend using Microsoft Graph Explorer to do this. The address to graph explorer is https://developer.microsoft.com/en-us/graph/graph-explorer.

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*.

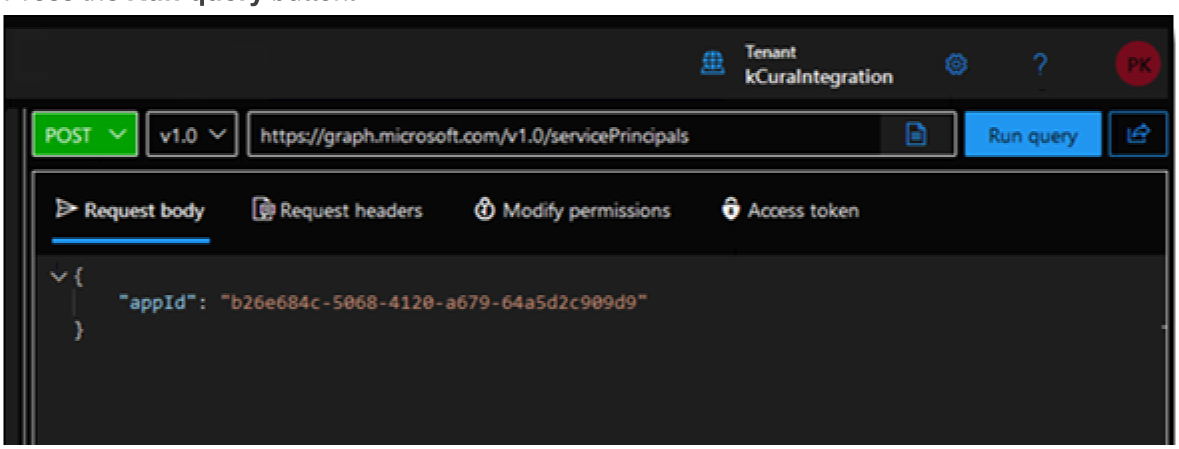
2. Click on the avatar icon on the top right.
   This opens a login window, where you can login with your credentials.



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.

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



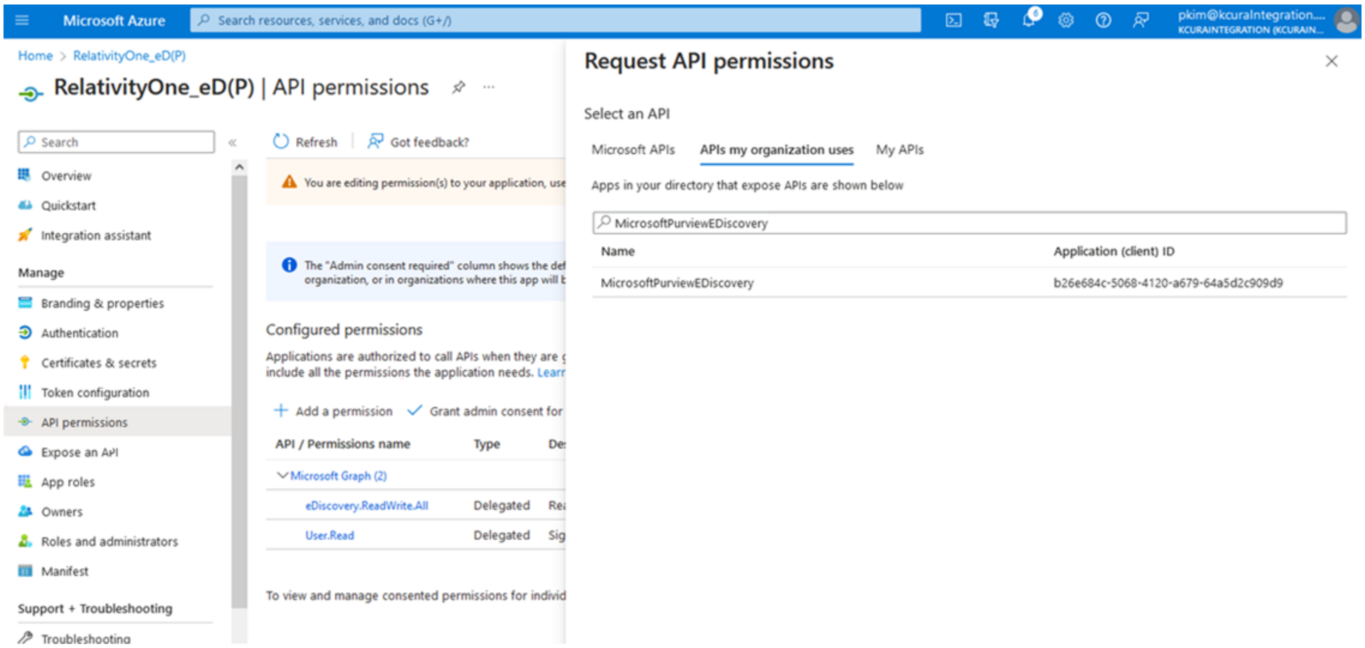
7. Confirm you received a **Created – 201** response.

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**. These roles are necessary to grant eDiscovery permissions.
- **Purview eDiscovery Premium roles**. These roles are 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.

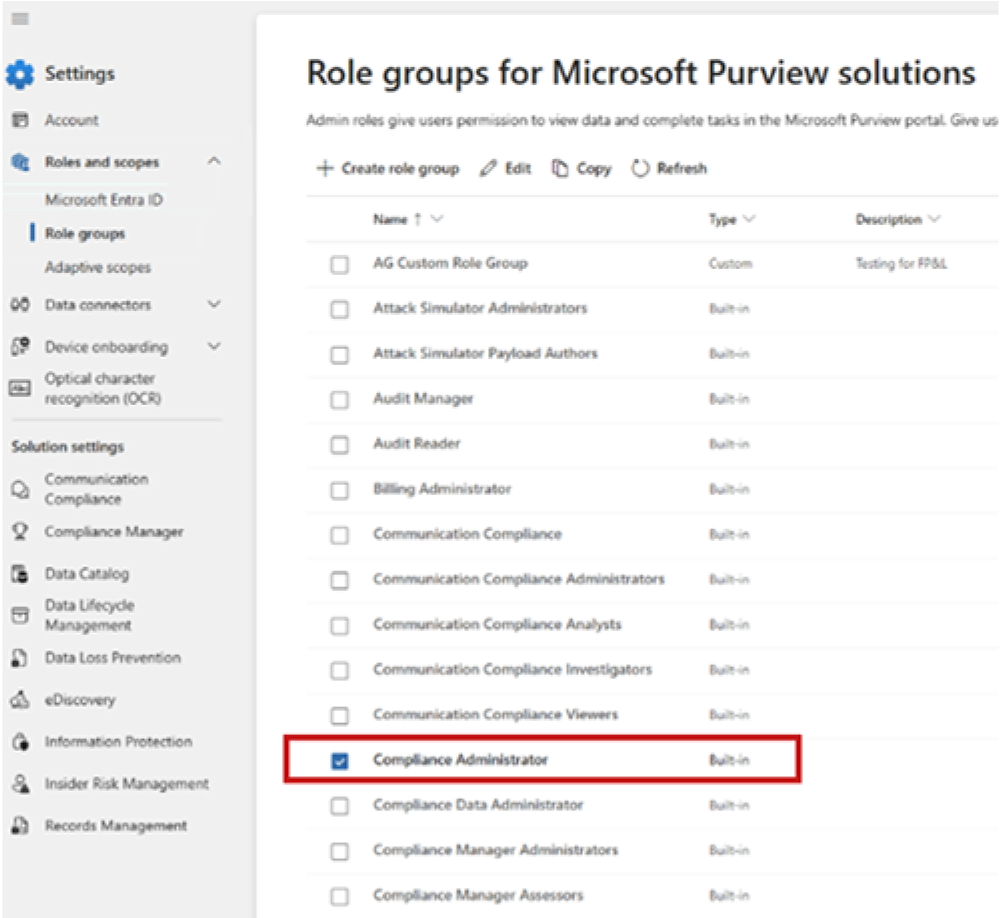
Note: If you see a screen that the Microsoft compliance portal is retired, it might mean that you are using the old Microsoft compliance portal that was disabled in November 2024. Navigate to the new Microsoft Purview instead.

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.



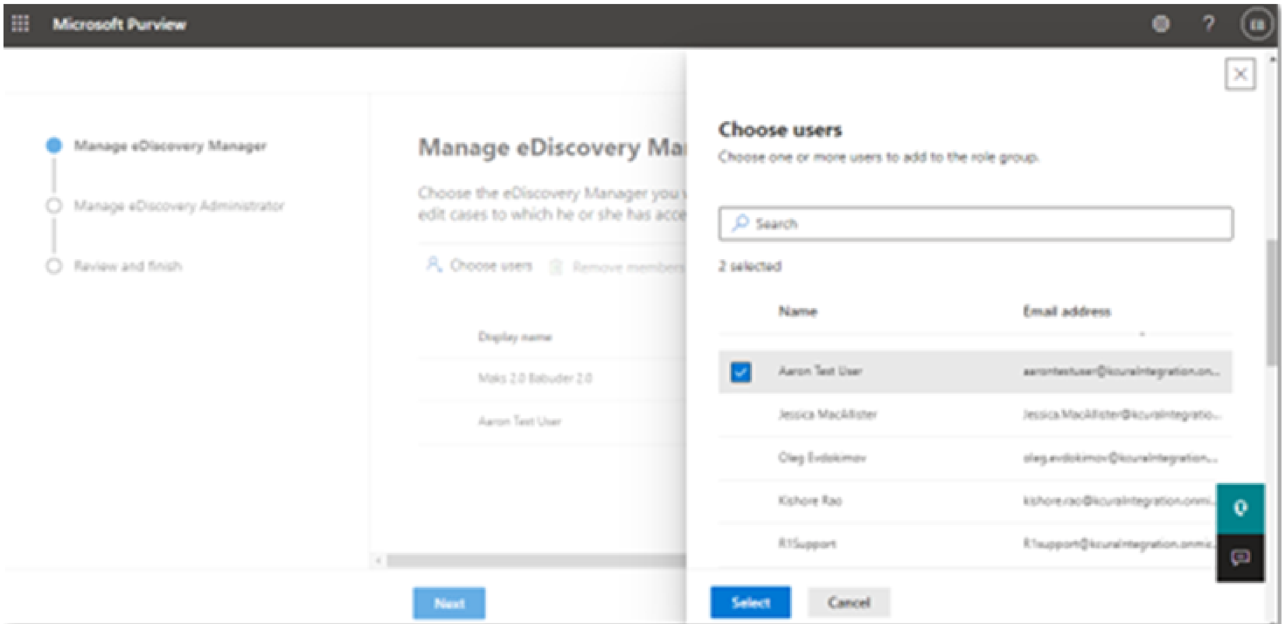
4. Click the Compliance **Data Administrator role > Edit > Choose users**.
   - Ensure all users, including service accounts that will be using Purview Sync in RelativityOne, are assigned this role.
   - If there are users that need to be added, click the **Add assignments** button to add them.
   -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

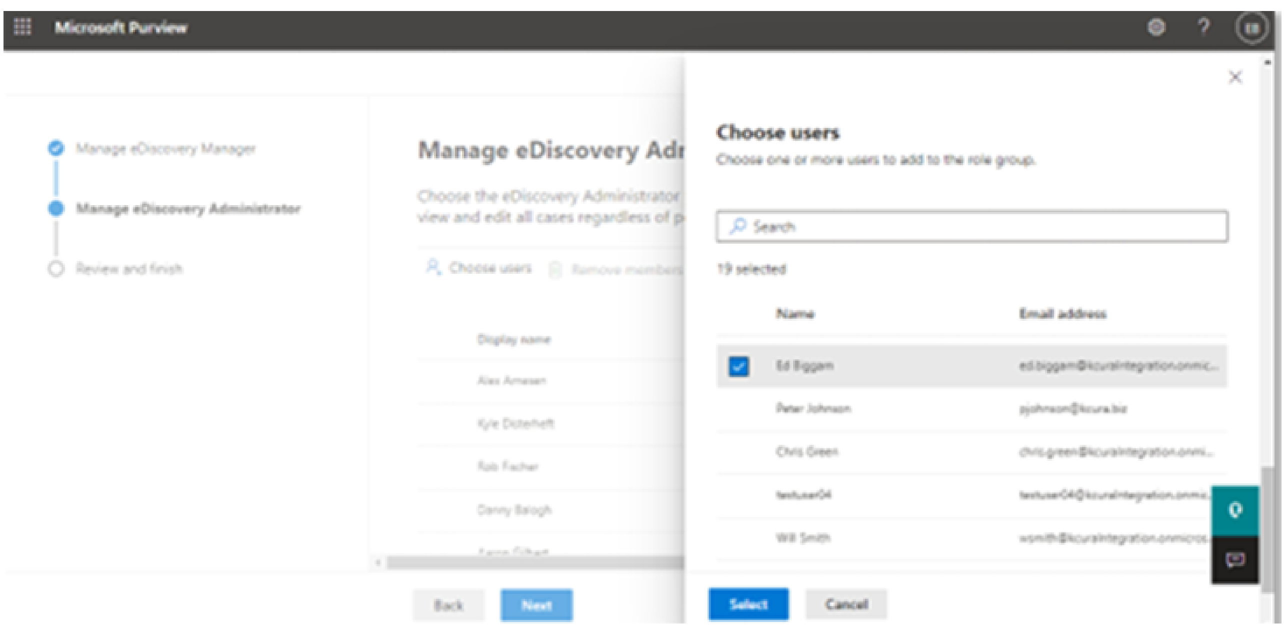
   a. Click the **Next** button to navigate to the **Manage eDiscovery Administrator** options.

   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.

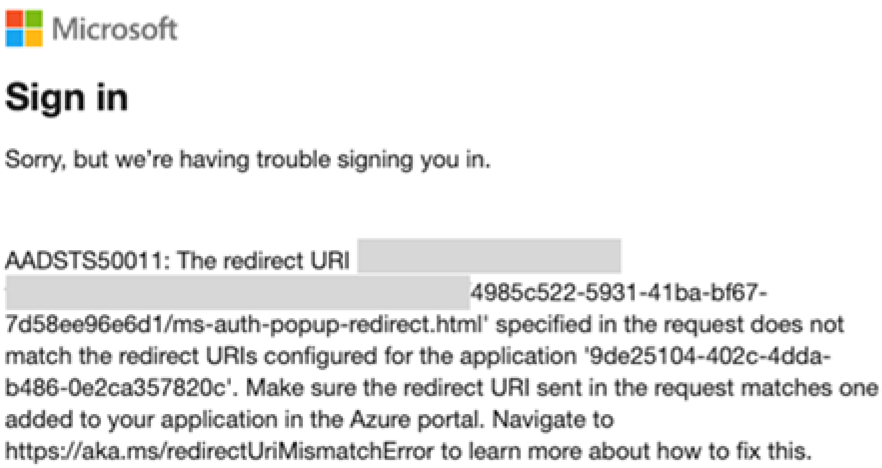
4 Purview Sync Application registration issues troubleshooting

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.



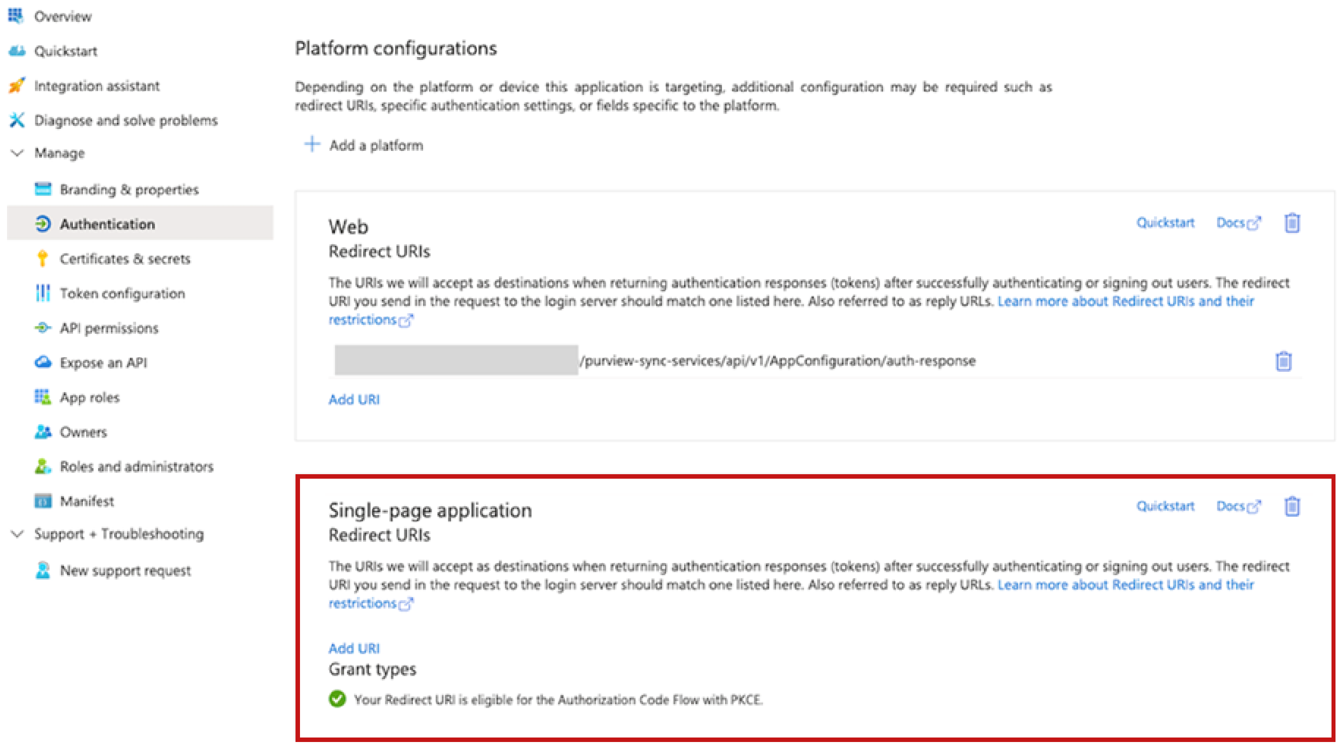
Cause

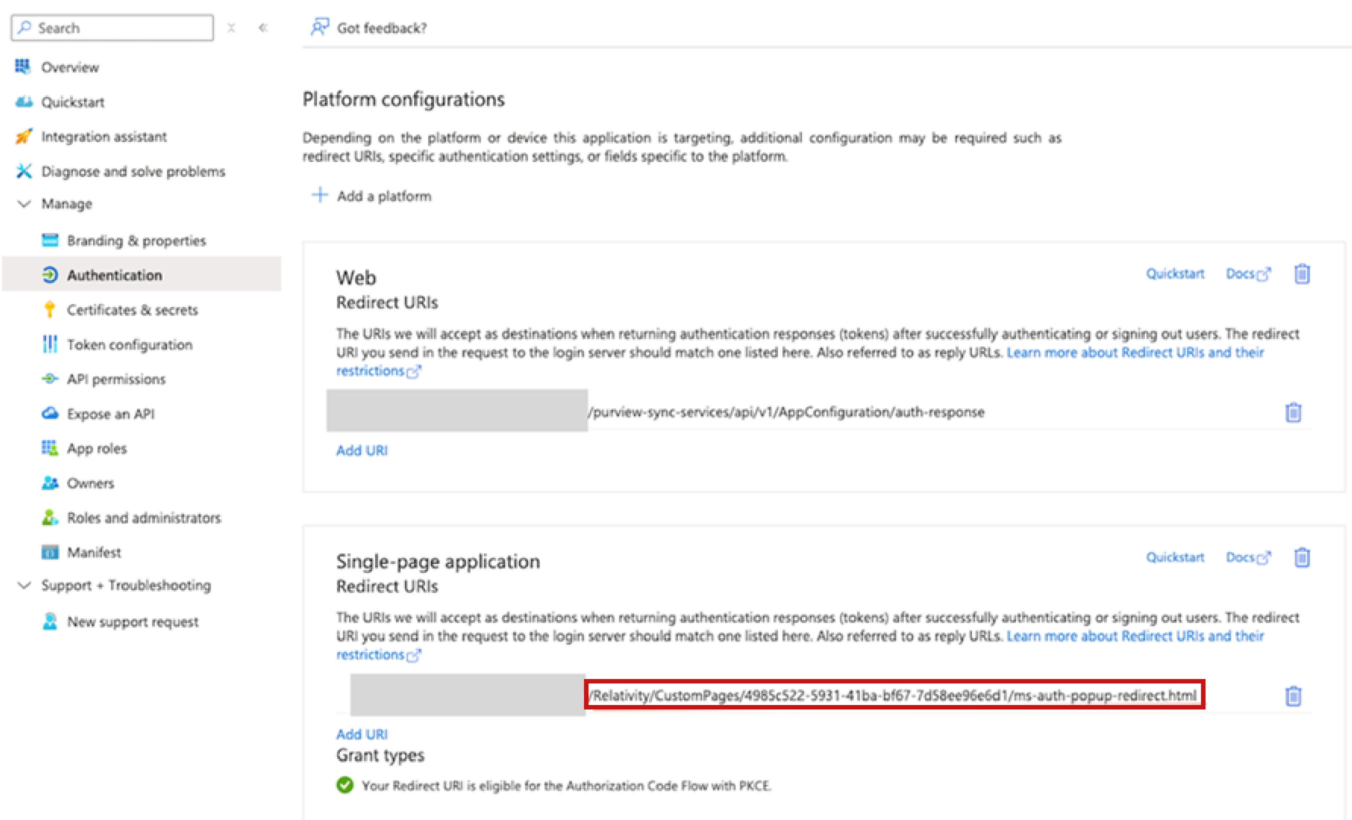
You have not configured the redirect URI. On the Authentication page, in the section Single-page application, the Redirect URIs does not have a configured URI.

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.

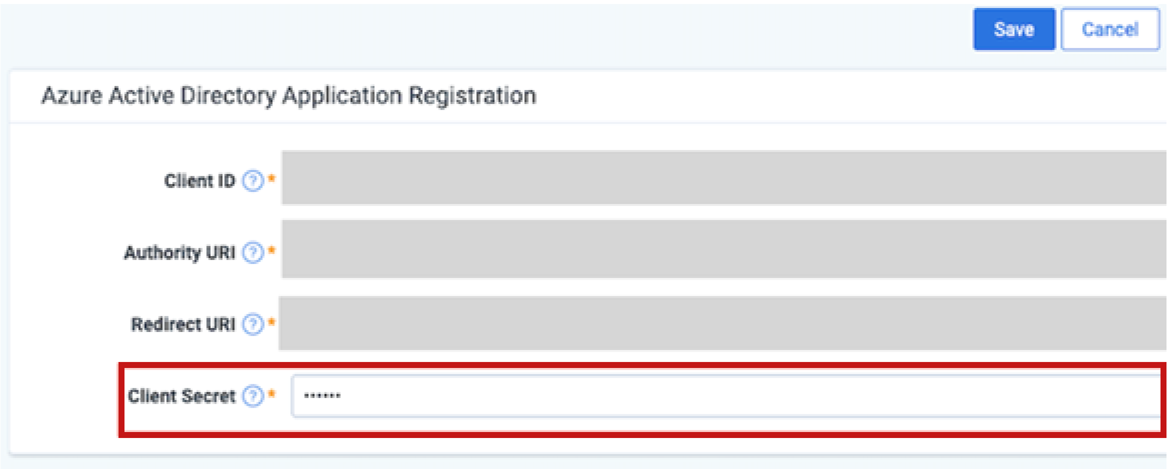
Fix

Check that you provided Client Secret that is not expired.

To update the client secret:

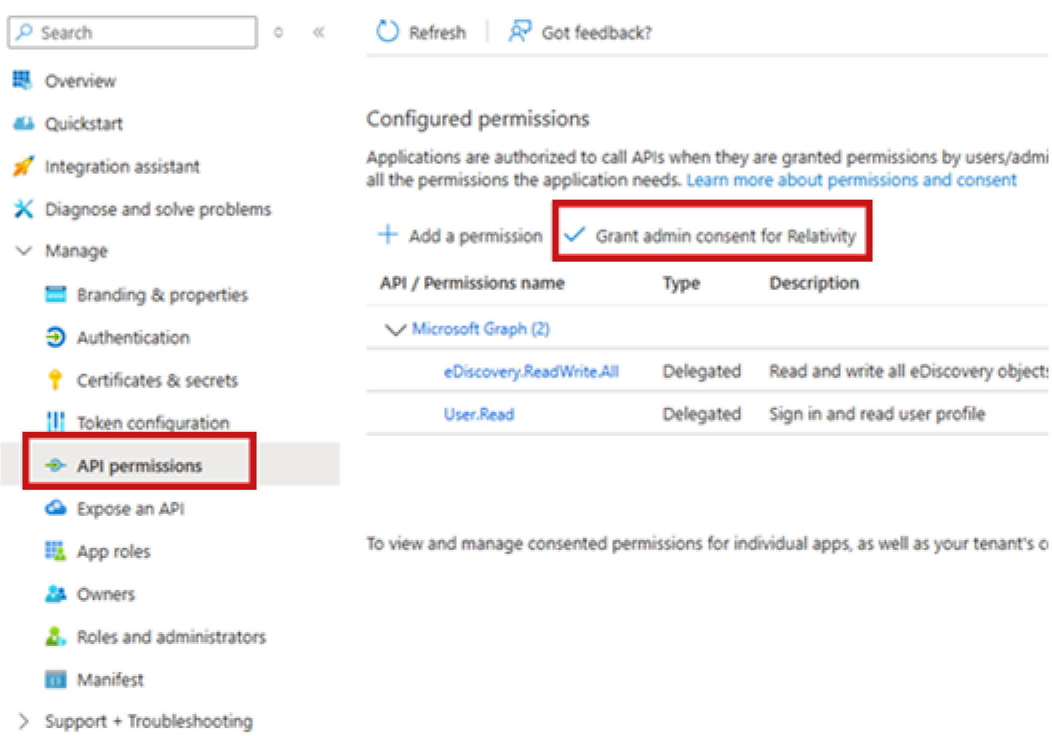
1. In RelativityOne, navigate to **Purview Sync > Configuration**.
2. If secret is not expired, click **Edit** Purview Sync configuration.
3. Update the Client Secret field.
4. Click **Save**.

For more information, see [Creating a client secret](#).



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

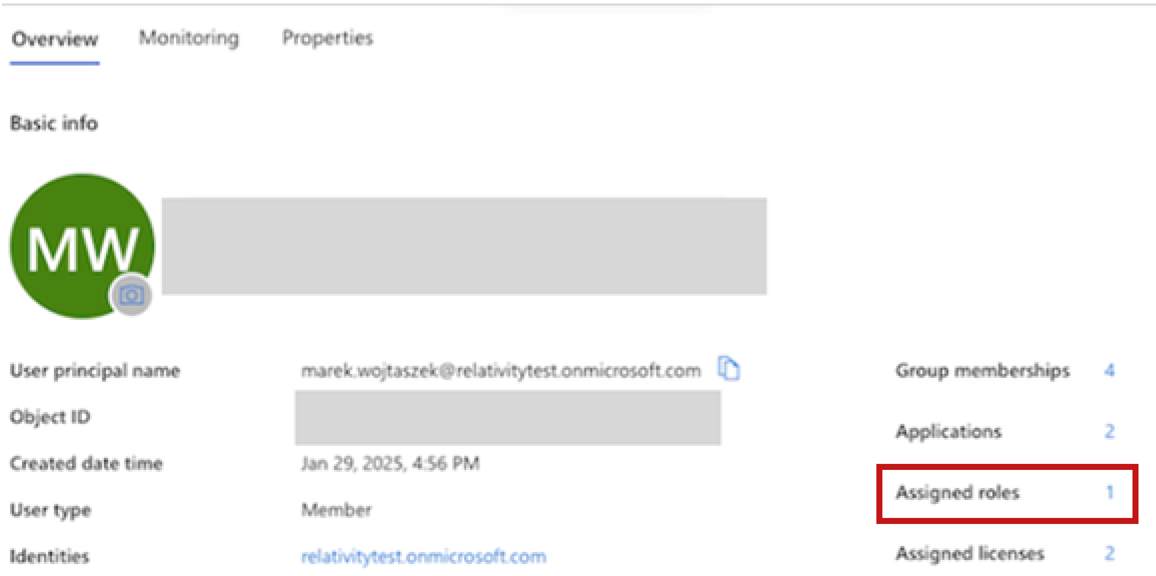
Missing Global Admin assigned role.



Fix

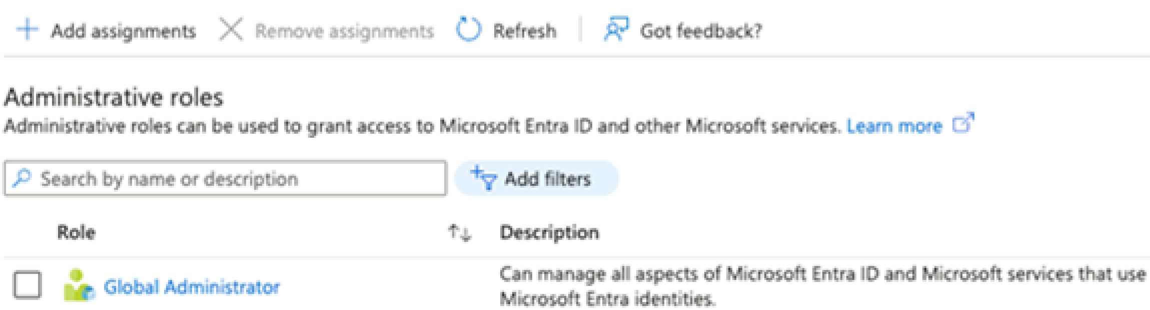
To update the missing Global Admin role:

1. In Azure, navigate to **Users**.
2. Search for your user.
3. Go to **Assigned roles** and click link next to the text.



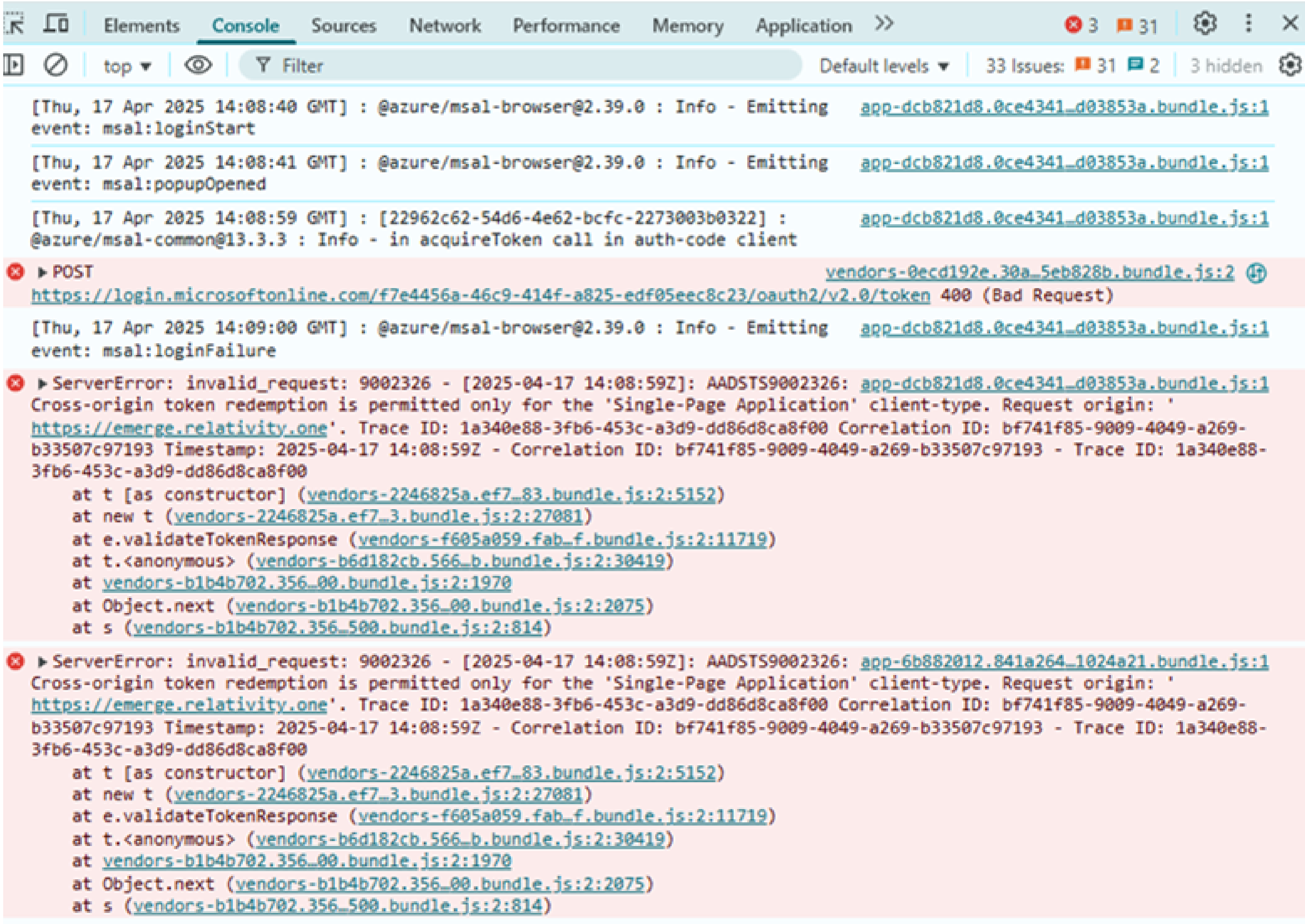
4. Check if you have Global Administrator role.

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

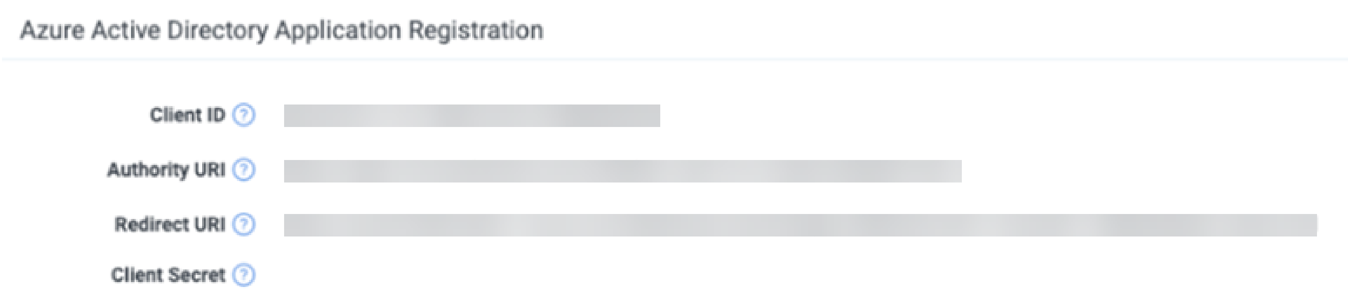
There is an issue with wrong character in URI. Open **Developer tools > Console**. Repeat reproduction step to check what you logged in. The console window can look like the following image:



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

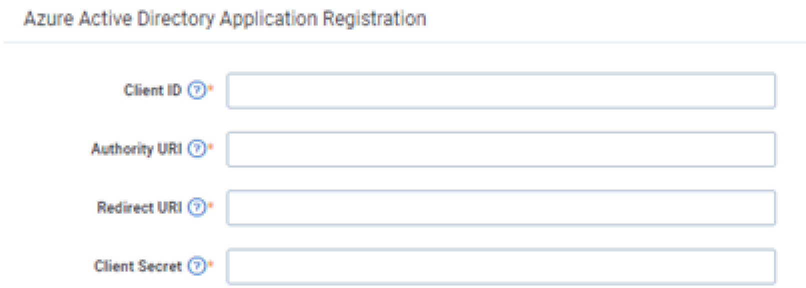
After registering Purview Sync with Microsoft Azure AD, you need to configure and integrate Microsoft with Relativity.

Purview Sync uses a *Delegate Permissions* model based on the user that launches the process. This means you can have a user with full access to all relevant client data in Purview and a user with less permissions who only has access to certain review sets. Purview Sync will respect the permission set within the application.

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

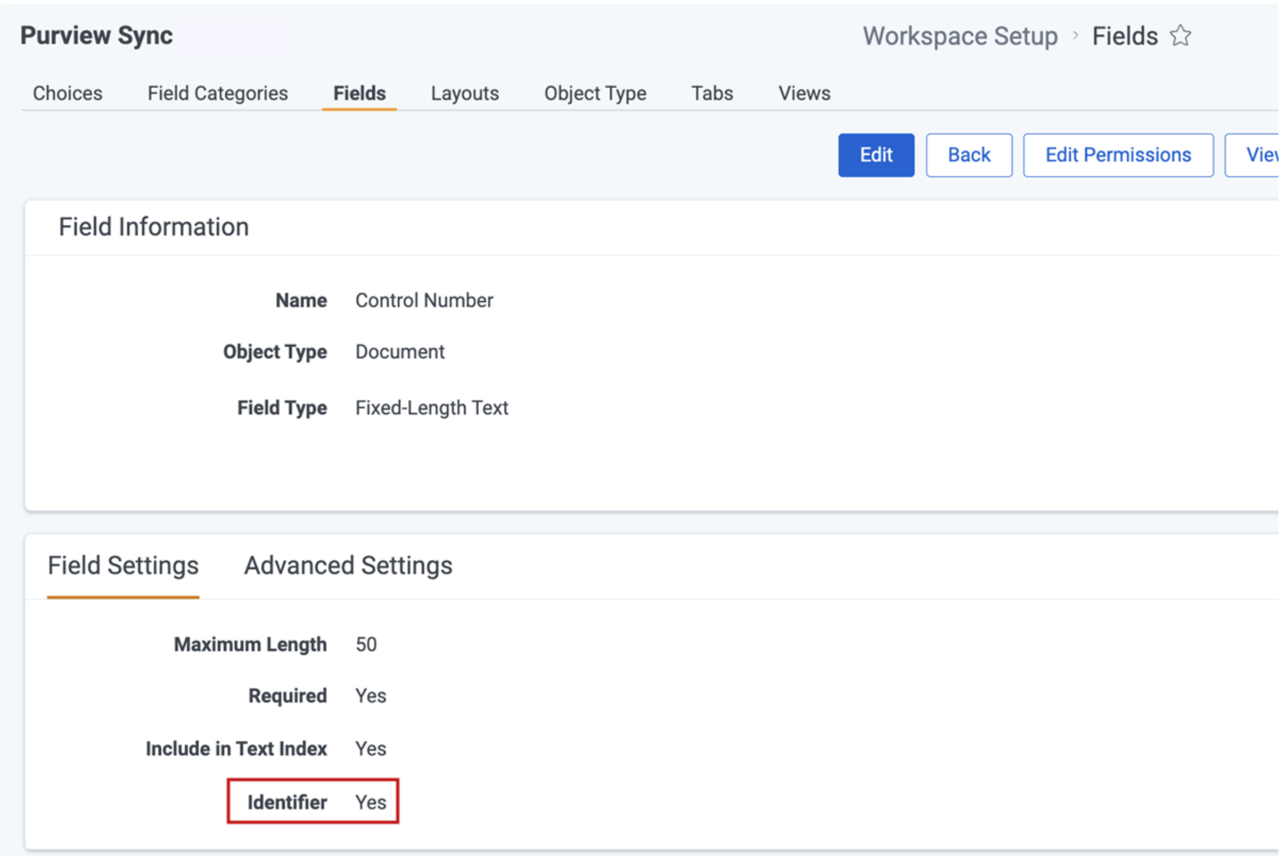
To import data from Microsoft to RelativityOne using Purview Sync, you will need to have the application installed and configured properly. For more information, see Install Purview Sync.

6.1 Prerequisites

Complete the following before importing data:

- You must create review sets in Microsoft before using Purview Sync. For more information, see Microsoft's documentation.
  - Microsoft recommends using review sets created after November 1, 2025, following their fix to the *Custodian* column in the .csv load file. Prior to this, the column was empty.
  - This fix applies only to review sets created after implementation. Please check Microsoft documentation for its load file metadata.
  - Purview Sync not support jobs based on old review sets. To ensure accurate and defensible custodian data, Purview Sync will allow creating jobs only with new review sets, post-fix.
- 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.
    - Setting the **Auto-publish set** to *No*, automatic publishing process will not start automatically.
        - For the job to be completed, you must manually publish the files in the processing set within 71.5 hours after the job enters the processing phase.
        - If the file is not published within this time frame, the job will not complete successfully.
- You must configure fields in the following way before running a Purview Sync job:
    - There must be one field which will be the identifier in your workspace. This means one field with the Identifier property set to *Yes*. The name of this field can be anything. For example, *Control Number*.



    - Purview Sync requires the following fields in the workspace with sources set. Names of these fields can be anything:
        - **File Name**
        - **Source Path**
    - You must enable all required processing fields for Purview Sync. For example, the *Level* and *Virtual Path* fields. For more information, see the Processing documentation.
- 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 38.

6.2 Considerations

Before importing data, consider the following:

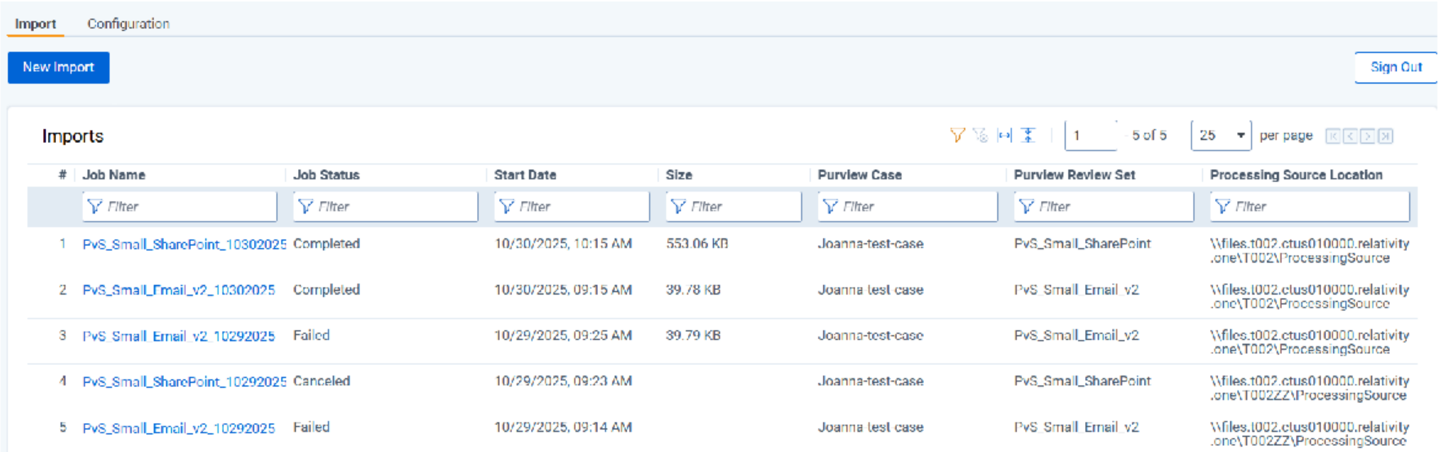
- When creating review sets in Microsoft Purview:
  - You can add any Microsoft 365 data to your review set in Purview, and Purview Sync will import the entire review set at once.
  - You can import one review set per one Purview Sync job.
  - If you apply filters to your review set, they are not respected in the export process of your data to Relativity. For example, data is transferred as if filters were not applied.
- We recommend keeping exports sizes below 100 GB. We recommend creating multiple review sets when the data set is larger than 100 GB.
- Email attachments from Microsoft are delivered both within the email container and as individual files.
  - Each version, the container and the standalone file, has its own identifier in the Microsoft load file.
  - As a result, these attachments appear in Relativity both as part of the email family and as separate loose files.
- 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.
- Microsoft changed the structure of Microsoft Teams export data by removing metadata that previously enabled reliable attachment-to-message linking.
  - Attachments may be displayed under a system-generated placeholder Teams message, named *Attachments* with a timestamp when conversation-level linkage is not available.
  - All attachments continue to be fully captured and preserved.
- Microsoft is updating its support for Copilot.
  - This means that some attachments may not be discoverable in Microsoft Purview.
  - These undiscovered attachments cannot be imported into Purview Sync.
- Microsoft stores Sensitive Labels as GUIDs, rather than display values. Purview Sync imports Sensitive Labels as GUIDs and populates them as such in the workspace, provided that Sensitive Labels are included in the metadata selected to be overlaid in your Purview Sync job.
- When a Purview review set contains an email with a single attachment, then Microsoft Purview exports the attachment as a separatefile.
  - The email that includes this attachment, is extracted by Processing.
  - Check the processing profile used in this job to change deduplication behavior.
  - For more information, see the Processing guide.

6.3 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.

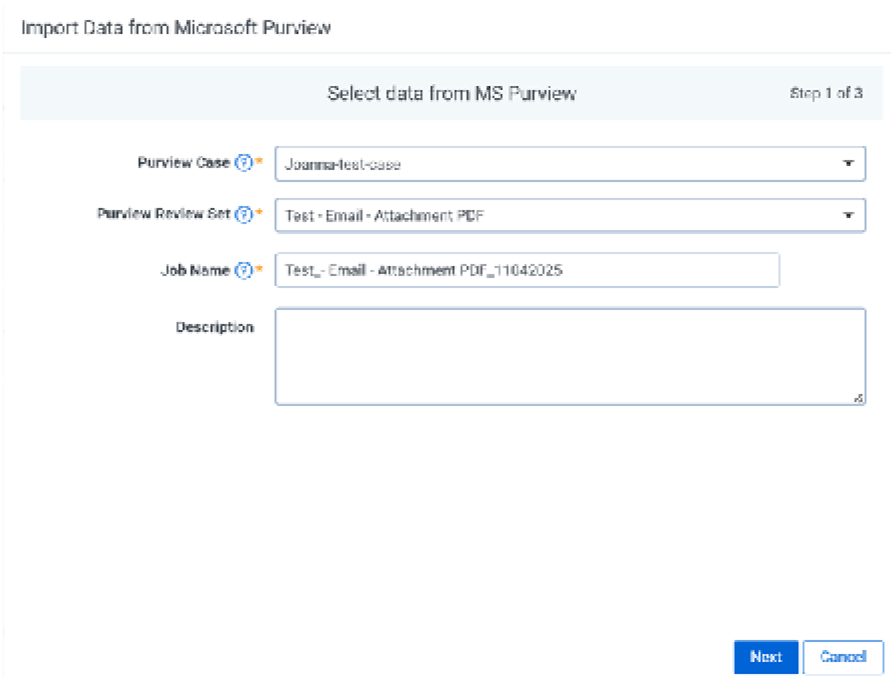
Data is exported in the condensed directory structure format. Emails are exported as .msg files.

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.



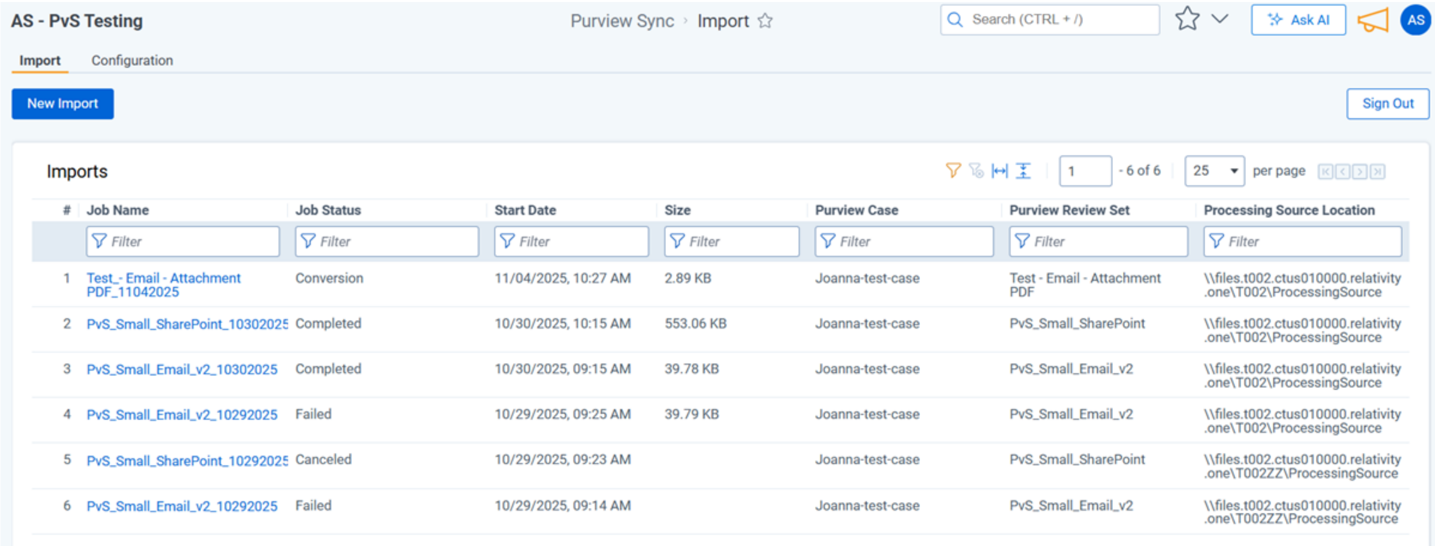
To import the review sets from Microsoft to RelativityOne,

1. Navigate to the **Import** tab.
2. Click the **New Import** button.
3. Select a **Purview Case** and a **Purview Review Set**.
   - Optionally, update the *Job Name* and add a *Job Description*. Click **Next**.
   - For more information, see Import fields on the next page.



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**.
   - For more information, see Processing fields on the next page.
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.



6.3.1 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.

6.3.2 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.
- **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.

6.4 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.

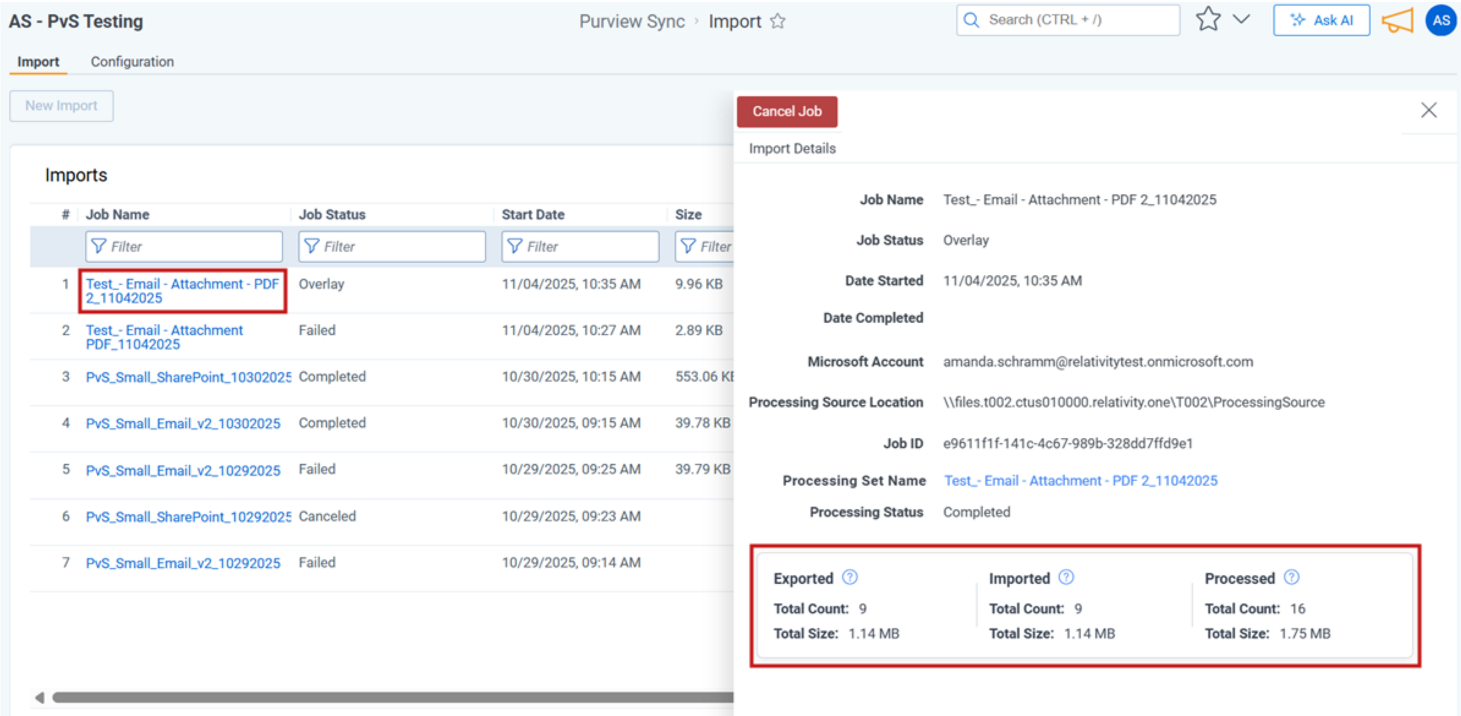
6.5 Import details

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 doc-

uments or for storing collected data.For more information, see Processing documentation.

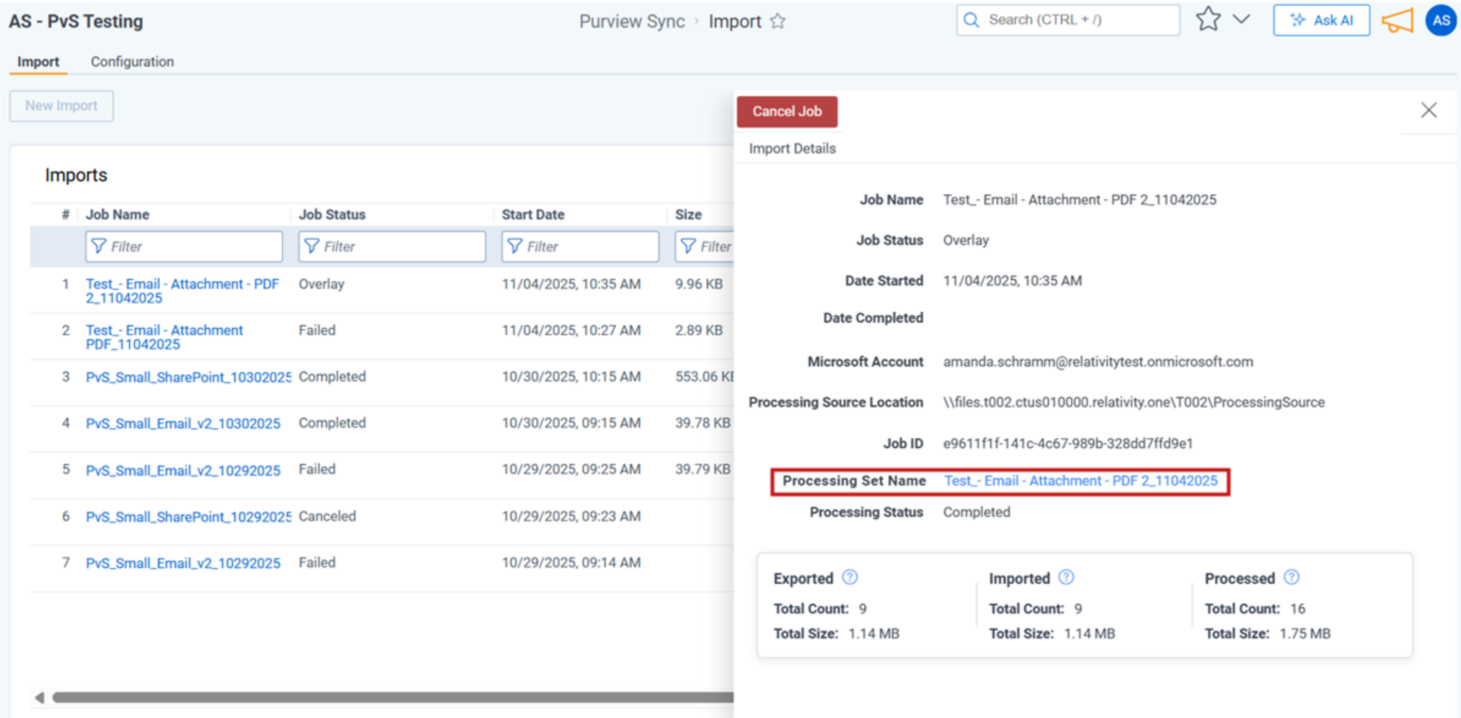
- **Job ID**—unique ID of your job. It might be helpful if you contact Customer Support.

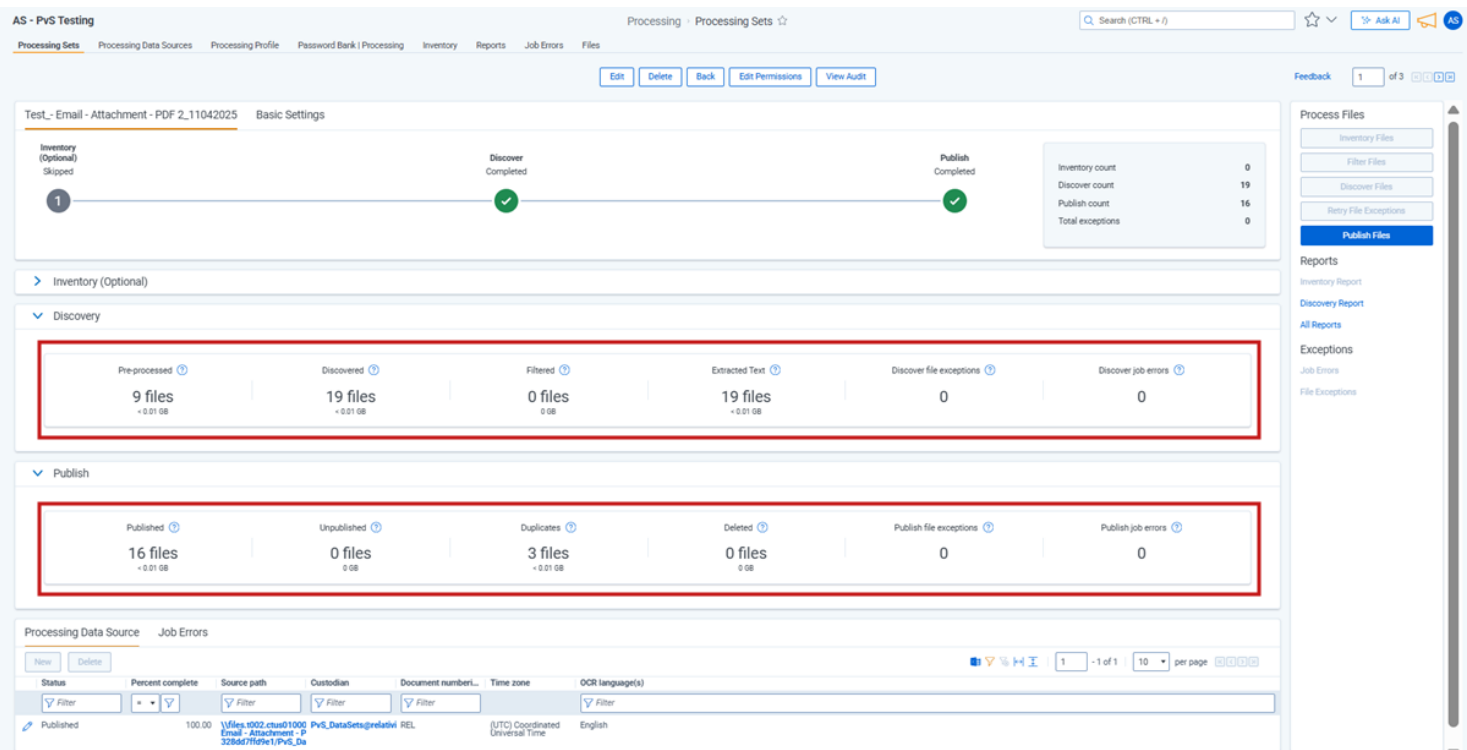


Underneath these job details, you can find details of a Processing Set:

- **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.





6.6 Cancel and retry job

You can cancel a Purview Sync job at any time after it has been created. You cannot cancel a finished job, *Completed* status, or has failed, *Failed* status.

You can retry a Purview Sync job that failed. When retried, Purview Sync resumes 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

Processing is an integral part of the Purview Sync workflow. This means that processing occurs automatically in Purview Sync when you have **Auto-publish set** to *Yes* in your processing profile. Thus, any processing settings such as deduplication will function as expected in your RelativityOne workspace.

For more information, see Considerations on page 31.

7.2 Processing custodians

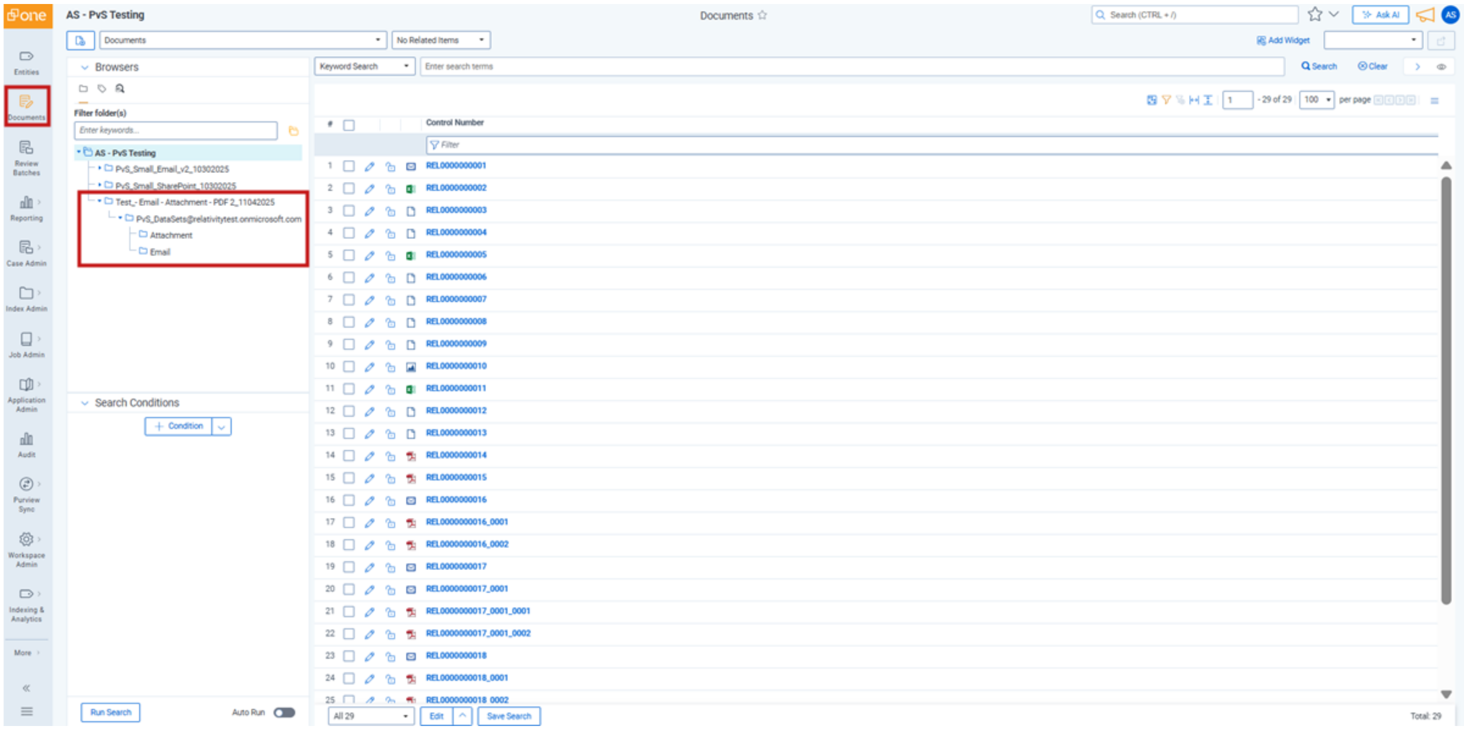
Purview Sync automatically organizes all imported files by custodians, with custodian definitions pulled from the load file imported from Microsoft Purview. Custodians are defined by their emails in Purview Sync.

Note: Starting November 2025, Microsoft implemented a fix to the *Custodian* column in the .csv load file. Prior to this, the column was empty. We recommend using review sets created after this date to ensure custodial information is accurate and defensible. For more details, see Before you import.

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, the 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.



7.3 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. Overlaying data is 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. This is with the workspace having 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.

7.4 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

Teams format	Support	Details
		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 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 beha-

Teams format	Support	Details
		vior 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 beha-

Teams format	Support	Details
		vior in Microsoft Purview, only in original language.
Modern attachments	Teams - Supported 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.

Teams format	Support	Details
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 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 format	Support	Details
		Teams chat and its associated Viva Engage file are imported by Purview Sync. Both remain in HTML format.
Fluid	Supported	Both the Teams chat and its associated Fluid file are imported by Purview Sync. The Teams chat is converted into RSMF, while the Fluid file remains in HTML format.

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	

8 Purview Sync frequently asked questions

This topic covers commonly questioned items within the Purview Sync application.

What roles and permissions are required to work with Purview Sync?
Following access is needed 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.

Purview Sync uses Delegated Permissions on the Microsoft side, so the RelativityOne user authenticating into the Microsoft 365 instance will need the permissions required to view relevant Purview Premium Cases and Review sets. What a given user has access to import is completely controlled on the Microsoft 365 tenant side.

What is a workflow in Purview Sync?
Purview Sync workflow consists of two main parts:

- Creating a Review Set in Microsoft Purview Premium
    - Identification and preservation of data
    - Collection of data: searching and committing to a review set
- Importing and Processing data into RelOne:
    - Selecting Case and Review Set at Microsoft Purview
    - Automatically downloading to Staging Locations
    - Automatically processing and overlaying metadata

What steps does Purview Sync follow while exporting data from Microsoft Purview?

1. **Export from Microsoft Purview**. Data is exported as archives containing natives, raw files, and a loadfile, additional metadata in MS format.
2. **Download and Unpack**. Purview Sync downloads the archives and unpacks them into the Processing Source.
3. **HTML Conversion**. Purview Sync identifies HTML files from Teams and Copilot data and converts them into the RSMF format.
4. **Data Organization**. Files are organized by custodian, with custodian definitions derived from the loadfile.
5. **Processing and Overlay**. Purview Sync processes the files using Relativity Processing and overlays the processed files with metadata from the load file.

What should I do if I see an error after trying to open Purview Sync application from the left-hand side tab?
If you see a 404 server error *File or directory not found* after clicking into Purview Sync tab while trying to open the application, it means that you have an old version of the application and you need to install the new version.

You can do it by going into Relativity Application Library (Relativity > Admin > Application Library > Select > select your workspace from Select Items – Select Workspaces > check it in > move to the right by clicking into an arrow > Apply).

It may take a while for the application to install on your workspace. It is completed when Status next to your workspace name under Workspaces Installed is “Installed”.

If you are not directed to your workspace after clicking on the name of your workspace here, go to Relativity and select from there.

Does Purview Sync have a retry option?
Yes, it does. When your job fails in Purview Sync, it finishes with *Failed* status, you can retry by clicking on the **Retry** button on the Job Details slide-out pane. There is no need to configure the job again. Purview Sync automatically attempts to run the job from the step on which it failed.

It might happen though that your job has failed due to reasons out of our control. For example, like Microsoft load file CVS format changes or similar, and your job has still the ‘Failed’ status even after attempting to retry it, please reach out to us.

Does Purview Sync have a cancel option?
Yes, it does. You can cancel your job at by clicking on the **Job Cancel** button on the Job Details slideout. You can do it when your job has any status other than *Completed* or *Failed*.

Does Purview Sync pull data that has already been processed using Purview?
If so, does Relativity workflow load the data directly into the workspace or route it through Relativity Processing?
Purview Sync will import existing review sets, which is basically data processed by Purview Premium. Data imported by Purview Sync will still need to run through RelativtyOne Processing. As part of our import process, we'll convert

Teams and Copilot data to RSMF with metadata overly to further decrease the time needed to get data for review.

How are modern attachments, or linked files, imported to Purview Sync?
Modern attachments are currently supported for Teams and partially supported for emails:

- **Teams**—Purview Sync imports a linked file attached to a Teams chat and establishes a family relation between the two, parent Teams chat and attached file.
- **Emails**—Purview Sync imports an email and a linked file, but family relation between the two is not yet properly established. We're working to have this family relation properly reflected.

How is metadata imported to Purview Sync? Is all metadata pulled from Microsoft Purview export and made available in Relativity?
Microsoft Purview creates an export object containing native files alongside a load file that holds all metadata information. Once files are processed 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.

We recommend to refer to Microsoft documentation when creating the metadata fields in RelativityOne for overlay.

How are custodians created in Purview Sync?
Custodians are automatically created in Purview Sync, so no action is required from the user. They are retrieved from the load file imported from Microsoft Purview, compared with existing custodians in Relativity, and new custodians are created if needed. Once the full list of custodians is established, they are used to define Data Source within a Processing Set. Thus, 1:1 relation between Data Source and custodians is established.

What is the format of the data exported from Microsoft Purview?
Microsoft Purview exports the data in the Condensed Directory Structure format and this is how Purview Sync retrieves it. Emails are exported as MSG files, while Teams and Copilot messages in the HTML format and Purview Sync automatically converts them into RSMF.

How does Purview Sync handle encrypted docs?
Documents labeled in SharePoint, or uploaded to SharePoint after integration with sensitivity labels are enabled, and that **have labels with admin-defined permissions and no expiration** ("Access Control" option turned on without expiration date) are decrypted. All other encrypted files in SharePoint are not decrypted.

If a document is labeled with an expiration date, this needs to be changed on the label's settings or document's labels side.

To apply sensitivity labels, you need specific permissions within the Microsoft Purview portal: Compliance Administrator, Security Administrator or Global Administrator.

Alternatively, members of your compliance team who are not assigned one of the above roles need the following permissions to create and manage sensitivity labels: Sensitivity Label Administrator or Label Policy Administrator.

What are processing settings needed for Purview Sync? Can they be configured by clients?
Purview Sync user has the ability to specify the processing profile for the processing Purview Sync invokes, you user has the full control over it. For the Purview Sync job to be completed, auto-publish in Processing Profile needs to be set to *True*.

The processing profile used for a Purview Sync job can have non-standard settings. For example, a non-standard prefix, time zone, or level numbering. It is just enough to select this one while configuring your Purview Sync job.

What are the deduplication settings used for processing?
Deduplication can be enabled or disabled in the processing profile used in Purview Sync. For example, Global Deduplication can be used in Purview Sync and works like elsewhere in Relativity.

Are hash values calculated by Relativity after the import?
Yes, Relativity Processing calculates MD5, SHA1 and SHA256 hashes. It also links child hashes in the container file.

How does Purview Sync handle deduplication?
The deduplication process in Purview Sync is done during Processing Publish, as it is done in general in RelativityOne. When you publish a processing set, Purview Sync applies the deduplication method specified in the processing profile to determine which documents to publish and which to exclude as duplicates.

Are there any deduplication concerns when a matter includes data imported through Purview alongside data ingested into Relativity Processing through other methods? For example, will identical emails—one processed first through Purview and the other directly ingested from the .pst—generate the same hash value and deduplicate correctly?
Email deduplication is done on a set of field attributes, so even in the same email arrives through different workflows or arrives in different formats, deduplication will work, since we're comparing email attributes and not files hashes in the way we do with loose office files.

What size of a data set can be handled by Purview Sync?
Following data set sizes that were successfully exported by us from Microsoft Purview, we recommend importing data sets of 100GBs and 25k files to Purview Sync. Within our partnership with Microsoft, we are working with Microsoft on extending sizes of data sources that can be exported from Microsoft Purview.

Does Purview Sync support .loop components?
Yes, it does support loop data through Teams, it comes through as HTML and most directly matches the conversation pattern that way. Attempting to convert it to RSMF basically messes up the original format so we kept in HTML.

When it comes to adding loop data to MS Purview review sets, Loop files created within Teams, CoPilot, and Outlook are discoverable and can be added to review sets because they are stored in a users' OneDrive or SharePoint. You can search by the file extension .loop for those specific files using content search or audit log.