

Relativity Collect - Bloomberg

November 4, 2021

Table of Contents

1 Collect	4
2 Installing Collect	5
2.1 System requirements for Collect	5
2.2 Installing Collect	5
2.2.1 Installing Collect from the Application Library to a workspace	5
2.3 Permissions to run Collect	6
3 Matters	8
3.1 Matters	8
3.1.1 Creating a matter	8
3.1.2 Matter Details layout fields	8
3.1.3 Viewing or editing matter details	9
4 Custodian targets	10
4.1 Custodians	10
4.2 Fields	10
4.3 Creating a custodian target	11
4.3.1 Generating targets in the wizard	12
4.4 Removing custodian targets	12
4.5 Target status	12
4.5.1 Reviewing collection targets	12
5 Creating a collection data source	14
5.1 Creating a collect data source	14
5.1.1 Data source types and properties	16
6 Collect tab	18
6.1 Creating a collection	18
6.1.1 Using the Collect wizard	18
6.2 Viewing or editing collection details	23
6.2.1 Storing collected data	24
6.2.2 Viewing collected data	24
6.3 Collect console	25
6.3.1 Generate Targets	25

6.3.2 Start Collection	25
6.3.3 Stop Collection	25
6.3.4 Retry Collection	25
6.3.5 Create Processing Job	25
6.3.6 Clone Collection	26
6.3.7 Reports	26
7 Collect reports	27
7.1 Running reports	27
7.1.1 Collection Summary report	27
7.1.2 Collection Details report	27
7.1.3 Results report	27
7.1.4 Errors report	27
8 Collect Store	28
8.1 Moving collected data into storage	28
8.2 Exporting collected data	28
9 Monitor	29

1 Collect

Collect is an easy-to-use application for collecting your custodian's data through different sources. Start by setting up Collect as an application within your data source. For information on registering an app, see the source's documentation on their website. Once registered, start adding custodians, data sources, and targets to Collect. Once connected, start the collect job and begin collecting data from custodians.

Note: This document covers the Bloomberg source.

- **Bloomberg** - collect data from Bloomberg Chat and Email sources.

Collection Details ⓘ

Name *

Job Number

Collection Matter *

Processing Source Location *

Description

Zip Collected Files

Receive Progress Notifications

Zip Password
 Show Password

Notification Address

All Data Sources Selected Data Sources

Select At Least One *

Bloomberg - Chat

Bloomberg - Mail

2 Installing Collect

You can easily install Collect in a workspace by using the functionality available through the Application Deployment System (ADS). This system provides you with the option to install Collect by selecting it from the list of existing applications in the Application Library tab or by importing it from an external application file.

To install Collect, perform the following procedures:

1. Install Collect from the Application Library. See [Installing Collect below](#).

2.1 System requirements for Collect

Collect uses the ADS framework, so you install it as an application within a Relativity instance. Consequently, Collect has the same system requirements as RelativityOne. For RelativityOne's system requirements, see System Requirements on the RelativityOne Documentation site.

Note: Confirm that you have the appropriate system admin permissions to install an application. For more information, see Workspace security on the RelativityOne Documentation site.

2.2 Installing Collect

Collect is compatible with RelativityOne. See Getting started in RelativityOne on the Documentation site for requirements. Note that for a Collect-only installation, you do not need the following pre-requisites:

- Analytics server setup
- Database server for processing or native imaging
- Worker server for processing or native imaging
- Obtaining applications for native imaging and processing

Because Collect uses the ADS framework, you can install through the Relativity Application tab from the library. See [Installing Collect from the Application Library to a workspace below](#).


Note: You configure security permissions on Collect just as you would for any other Relativity application. For more information, see Workspace security on the Relativity RelativityOne Documentation site.

2.2.1 Installing Collect from the Application Library to a workspace

If Collect is in the Application Library, you can install it to the current workspace. Confirm that you have the appropriate system admin permissions to install an application. For more information, see Workspace security on the RelativityOne Documentation site.

Note: Analytics, Case Dynamics, Collect, Legal Hold, and Processing all share the Entity object. You may be prompted to complete additional steps to unlock and resolve conflicts of the listed applications in order to complete installation. For information, see Troubleshooting application installation errors on the Relativity Beta Documentation site.

Use the following procedure to install Collect from the Application Library:

1. Navigate to the workspace where you want to install the application.
2. Navigate to the **Application Admin** tab.
3. Click **New Relativity Application** to display an application form.
4. Click the **Select from Application Library** radio button in the Application Type section.
5. Click  in the **Choose from Application Library** field.
6. Select **Collect** on the Select Library Application dialog. This dialog only displays applications added to the Application Library. If **Collect** is not included in the list, see the **Installing applications** topic.
7. Click **Ok** to display the application in the **Choose from Application Library** field. The application form also displays the following fields:
 - **Version** - displays the version of the application that you are installing.
 - **User-friendly URL** - displays a user-friendly version of the application's URL. This field may be blank.
 - **Application Artifacts** - displays object types and other application components.
 - **Map Fields** - There are no fields available in **Collect** for mapping.
8. Click **Import** to install **Collect** into the workspace.
9. Review the import status of the application. Verify that the install was successful or resolve errors.

2.3 Permissions to run Collect

The following security permissions are required to run and complete the collection process:

Object Security	Tab Visibility	Other Settings
<ul style="list-style-type: none"> ■ Collection – View, Edit, Add ■ Collection Detail Custodian – View, Edit, Add ■ Collection Detail Custodian Target – View, Edit, Add ■ Collection Detail Custodian Target Result – View, Edit, Add ■ Collection Detail Request – View, Edit, Add ■ Collection Detail Source Instance – View, Edit, Add ■ Collection Detail Source Type – View, Edit, Add ■ Collection Detail Summary – View, Edit, Add ■ Collection Matter – View, Edit, Add ■ Collection Source Instance – View, Edit, Add ■ Collection Source Instance Parameter – View, Edit, Add ■ Collection Source Type – View, Edit, Add ■ Collection Source Type Parameter Type – View, Edit, Add ■ Collection Source Type Criteria – View, Edit, Add ■ Custodian Target – View, Edit, Add ■ Entity – View, Edit, Add ■ Custom – View, Edit, Add 	<ul style="list-style-type: none"> ■ Entities ■ Collect <ul style="list-style-type: none"> ○ Matters ○ Custodian Targets ○ Collections ○ Status Summary ○ Target Status ○ Collection Admin ○ Monitor 	<ul style="list-style-type: none"> ■ None

3 Matters

In Collect, a matter represents a legal action or case requiring you to collect electronic data from sources such as Bloomberg. Matters can be used to group multiple related collection jobs.

3.1 Matters

You manage matters that are associated with a collection. You can create each of these items on their respective tabs, or you can create them when you add a new collection.

Note: Matters created from Home aren't available for use in Collect nor listed on the Matters tab in this application. Additionally, the matters created on this tab are only available for use in Collect.

3.1.1 Creating a matter

Use the following procedure to create a matter that you can associate with a collection:

1. Navigate to the Matters tab. Collect displays a list of the active matters currently available to this application.
2. Click **New Matter**.
3. Complete the fields in the Matter Details layout. See [Matter Details layout fields below](#).
4. Click **Save**. Collect displays the matter details. See [Viewing or editing matter details on the next page](#).
You can also create a matter when you add a new collection. Click the **Add** link on the collection layout. See [Creating a collection on page 18](#).

3.1.2 Matter Details layout fields

The Matter Details layout contains the following fields:

- **Name** - the name of the matter.
- **Number** - the number you assign to the matter for reporting purposes.
- **Status** - the status you assign to the matter for reporting purposes. Select an existing status from the drop-down menu or click **Add** to define a new one. Existing statuses include **Active** and **Closed**.

Note: Assigning a status of Closed to a matter hides it from the Active Collect view on the Collect tab.

- **Primary Contact** - the name of an individual who handles communications related to the matter.
- **Description** - the description of the matter used for reporting purposes. Click **Edit** to display an HTML text editor where you can enter the description.

Matter Details

Matter Details

Name *

Number

Status Manage

Primary Contact

Description Edit

3.1.3 Viewing or editing matter details

Display the matter details by clicking the name of a matter on the Matters tab. Collect also displays these details immediately after you add a new matter. You can use the buttons at the top of the page to edit, delete, or perform other tasks with the matter.

The details page includes the following sections:

- **Matters Details** - lists the name, number, status, primary contact and description of the matter.
- **Collect** - lists all collections associated with the matter. You can also perform the following tasks in this section:
 - **Associate the matter with a new collection** - to create a new collection, click **New**. See [Creating a collection on page 18](#).
 - **Remove a collection from Relativity** - click **Delete** to display a pop-up window. To view child objects and associated objects, click **Dependencies**.
 - **Modify collection details** - click the **Edit** link for a collection. To modify the matter, click the **Edit** button at the top of the page.
 - **Display the collection details** - click the name of the collection.

4 Custodian targets

In Collect, you manage custodians that have an associated data source. The custodian target is the combination of a custodian and data source. It is an endpoint from which RelativityOne Collect can connect to and collect from.

To collect from custodians, entities either have to exist, be created, or be imported in Relativity. The custodian and their primary email address also needs to be associated to the data source. When the primary email address field for a custodian is present, Collect will auto-generate the required targets for each data source while setting up a collection job.

In this document, the source is Bloomberg.

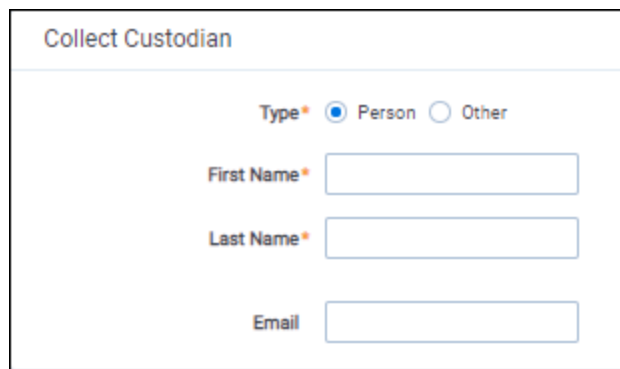
4.1 Custodians

If a custodian does not exist, you can manually create an entity from the Entities tab. Once you create an entity in the Collect Custodian view and add it to a collect project, it becomes a custodian.

You can add custodians to Collect at different times throughout the collection process. There are different ways to populate the entity list including using Integration Points, the RDC, or manually. For more information, see Integration Points and RDC. To manually create a new custodian, follow the steps below:

1. Navigate to the **Entities** tab.
2. Click **New Entity** on the Custodians tab.
3. Select the **Collection History** layout from the drop-down menu and complete the fields. See [Fields below](#).
4. Click **Save**.

Note: When creating a custodian from Legal Hold, the **Custodians - Legal Hold View** is selected by default. If Collection or Processing is also installed in the same workspace, you can view the **Custodians - Processing View** or **Custodians - Collection View** accordingly.



The screenshot shows a web form titled "Collect Custodian". At the top, there is a "Type*" field with two radio button options: "Person" (which is selected) and "Other". Below this are three text input fields: "First Name*", "Last Name*", and "Email". Each field has a red asterisk indicating it is required. The form is enclosed in a light blue border.

4.2 Fields

The Collection Custodian layout provides the following fields:

- **Custodian Type** - select one of the following:
 - **Person** - select this to enter first and last name of the individual acting as custodian of the data you wish to process.
 - **Entity** - select this if the custodian of the data you wish to process isn't an individual but is, for example, just a company name. You can also select this if you wish to enter an individual's full name without having that name include a comma once you export the data associated with it. Selecting this changes the Custodian layout to remove the required First Name and Last Name fields and instead presents a required Full Name field.
- **First Name** - the first name of the custodian. This field is only available if you've set the Custodian Type above to Person.
- **Last Name** - the last name of the custodian. This field is only available if you've set the Custodian Type above to Person.
- **Full Name** - the full name of the custodian of the data you wish to process. This field is only available if you've set the Custodian Type above to Entity. When you enter the full name of an entity, that name doesn't contain a comma when you export the data associated with it.
- **Email** - the email the custodian uses in the target. This email address must match the email address within the connected data source.

4.3 Creating a custodian target

You can collect electronic data from custodians who are individuals or entities involved in a legal action or case. You can collect electronic data for custodians from their computers, external hard drives, network drives, and other sources. You may perform multiple collections from a single custodian. On the Custodians tab, you can create and edit custodians as well as view their details, associate them with collections, and perform other tasks.

Use the following procedure to create a custodian target that you can associate with a collection:

1. Enter the **Name** of the custodian target.
2. Click **Select** to select available custodians. If the custodian doesn't exist, click **Add** and complete additional steps.
3. Click the **Data Source** drop-down menu to select a data source. For more information Collection data sources, see [Data source types and properties on page 16](#).
4. Enter the custodian's email address in the **Target** field.

Custodian Target Information

Name*

Entity* [Add](#)

Data Source*

Target*

4.3.1 Generating targets in the wizard

Custodian Targets can also be automatically generated in Step 4 of the Collect wizard. Click **Generate Targets** to check if targets exist for the custodians you've selected for collection. If the targets do not exist, Collect creates them based on the email address in the Entity details in each custodian. For more information, see [Collection Summary on page 22](#).

If an invalid custodian target is created manually, the auto-generation of custodian targets doesn't remove the invalid custodian target. The invalid custodian target needs to be removed manually. Find out if there are any errored targets in the Collection Summary step or on the Status Summary tab. To delete a custodian target from the Custodians Targets tab, click the data sources checkbox and use the Delete mass operation.

4.4 Removing custodian targets

To remove any custodian target, the custodian first needs to be removed from the collection, or collections. You can use the Mass delete operation to delete collect custodians, also known as entities. For more information, see the Admin Guide.

Trying to delete a custodian target before removing a custodian will result in an error.

4.5 Target status

The Target Status tab is a dashboard to see the statuses of collections. You can drill into each target from this dashboard. Able to look into the targets by custodian, data sources, or status to find out more about your collections. Focus on the collected components with this dashboard.

4.5.1 Reviewing collection targets

The Target Status dashboard is available after generating targets. To learn how to generate targets for a collection, see [Generate Targets on page 25](#). Once you generate targets, the dashboard organizes by collection jobs.

Status:

- **Not started** - the collection is set up, but hasn't been started.
- **Started** - the collection started and has not completed.
- **Completed** - the collection of the target completed without any errors.

- **Completed with Errors** - the collection of the target completed and had individual items that couldn't be collected. For more information, see the [Errors report on page 27](#).
- **Error** - the collection did not run successfully and couldn't collect from the target.

5 Creating a collection data source

Set up workspace data sources before beginning collections. Data sources are stores of information from which you collect data. These data sources have parameters that you can set during the creation of a collection job.

5.1 Creating a collect data source


The Collection Admin tab is where you create, edit, and remove data sources from your workspace. Setup only needs to be done once for each data source. You must create your data sources prior to setting up your custodian targets. For more information, see [Custodian targets on page 10](#).

When creating data sources, you can select different types of data sources for obtaining files. These types include Microsoft 365 (Outlook and OneDrive), Slack, and X1. In this document, you will create a collect data source for Bloomberg.

Use the following procedure to create a new Collect source instance:



On the Collect Admin page,

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select the type of data source:
 - **Bloomberg Chat** - select to collect data from Bloomberg Chat. For more information, see [Bloomberg Chat on page 16](#).
 - **Bloomberg Email** - select to collect data from Bloomberg Email. For more information, see [Bloomberg Email on page 17](#).

Data Source Information 

Name *

Type *

Settings

Host *

Path *

Username *

Password *

Pass Phrase

PGP Key

4. Enter the following information in Settings:

Bloomberg settings

- **Host** - the address of the Bloomberg host. For example, sftp.bloomberg.com.
- **Path** - the folder address of where the files are stored.
- **Username** - the username to your organization's Bloomberg site.
- **Password** the password to your organization's Bloomberg site.
- **Pass Phrase** - the pass phrase to your organization's Bloomberg site.
- **PGP Key** - the key used to decrypt the data that's transferred from the Bloomberg to Collect.

5. Click **Save**.

5.1.1 Data source types and properties

This section covers the different data sources that can be used in Collect. It also includes what can be searched within each data source. For more information on each data source types criteria, see [Criteria on page 22](#).

5.1.1.1 Bloomberg Chat

The following table lists the filter criteria support for Bloomberg Chat collections. Entering the start date and end data criteria isn't required.

Filter criteria

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

5.1.1.2 Bloomberg Email

The following table lists the filter criteria support for Bloomberg Email collections. Entering the start date and end data criteria isn't required.

Filter criteria

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

Note: Collect doesn't include conversation history, notes, or tasks in mailbox collections. Hidden folders that exist under the Top of Information Store are included in mailbox collections.

6 Collect tab

Before you begin collecting, you must create a collection job and associate it with a specific matter, custodians, and one or more data sources. Add the custodians, data sources, and other information using the Collect wizard. Once completed, start the collection using the Collect Console. Finally, download a results report that details the items collected and a summary report of the entire collection job. For more information, see [Reports on page 26](#).

6.1 Creating a collection

Before you begin creating a collection, make sure to create a matter. For more information, see [Matters on page 8](#).

Use the following procedure to create a collection:

1. On the Collect tab, click the **Collections** sub-tab. Collect displays a list of the collections currently added to this application.
2. Click **New Collection**.
3. Complete the steps in the Collect wizard. See [Using the Collect wizard below](#)
4. On the Collection Details page, click **Run Collection** in the console. See [Collection Summary on page 22](#).

6.1.1 Using the Collect wizard

The Collect wizard takes you through each step to create a collection. After completing the collection setup, run a collection from the Collection console.

Collection wizard security permissions

A Collect user needs the following permissions to use the Collect Wizard.

- **Custodian** - View

When a step is complete, click **Next** or the hyperlink under the next step shown. Click the **Previous** button to move to the previous step. Information is auto-saved when moving between steps. If any required information is missing or incorrect, an error message displays and are prevented from moving to the next step.

6.1.1.1 Collection Details

Complete the Collection Details step by entering information in the following fields:

- **Name** - the name of the collection.
- **Collection Matter** - the name of the matter associated with this collection. Click **Edit** to select an existing matter or click **Add** to define a new one. See [Creating a matter on page 8](#).
- **Processing Source Location** - the file repository for collected data to be stored for future processing of documents or for storing collected data. See [Processing](#) and [Collect Store on page 28](#).

Notes: All data sources that produce RSMF have a limit of 200MB. For more information, see Processing documentation.

- **ZIP Collected Files** - toggle on to compress all collected data into ZIP64 formatted containers. Selecting Yes adds additional steps to the collect process. For more information, see [Storing collected data on page 24](#).
- **Zip Password** - enter a password that is required by anyone attempting to decompress the ZIP64 container files.

Note: If Processing is installed in the workspace, Collect will automatically populate the Processing Password Bank with the password so it is available at the time the collection is processed.

- **Job Number** - enter a number that you want assigned to the job for reporting purposes.
- **Description** - enter a description of the collection used for reporting purposes.
- **Receive Progress Notifications** - toggle on to send or receive collection job status emails. The statuses include:
 - **Completed** – includes completed or completed with errors job status.
 - **Failed** – includes job status and reason for failure.
- **Notification Address** - enter the email address of person that wants to receive collection job statuses.
- **Data Source Type** - select one or more data sources to use in the collection. For more information, see [Data source types and properties on page 16](#).

(Click to expand)

The screenshot shows the 'Collection Details' configuration page. It features several input fields and controls:

- Name***: A text input field.
- Job Number**: A text input field.
- Collection Matter***: A dropdown menu with 'Select' and 'Add' buttons.
- Processing Source Location***: A dropdown menu with the text 'Select a source location...'.
- Zip Collected Files**: A toggle switch, currently turned off.
- Zip Password**: A text input field with a 'Show Password' checkbox below it.
- Description**: A large text area for entering details.
- Receive Progress Notifications**: A toggle switch, currently turned off.
- Notification Address**: A text input field for an email address.



 Below the form, there are two tabs: 'All Data Sources' and 'Selected Data Sources'. The 'Selected Data Sources' tab is active, showing two data source cards: 'Bloomberg - Chat' and 'Bloomberg - Mail'. Each card has a large blue 'B' logo and a green checkmark in the top right corner, indicating they are selected.

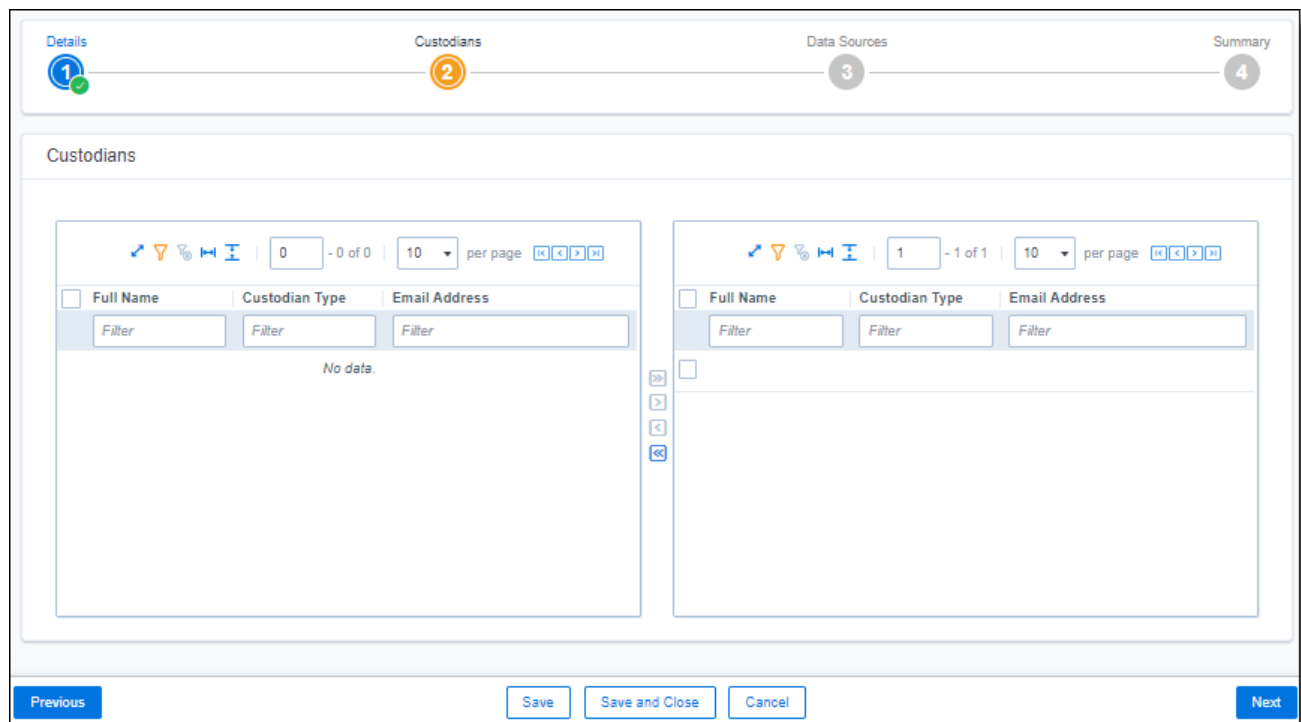
6.1.1.2 Custodians

Complete the Custodians step by assigning custodians to the project. Follow the steps below to assign a custodian:

1. From the Unselected custodians table, use the column filters to locate custodians.
2. Click a check box next to a custodian.

Notes: If you select multiple Slack custodians in the same collection, the channels they share will only collect once.

3. Click  to add select custodians. Click  to add all custodians.
4. Click **Next**.



Note: There is a limit of 10,000 custodians with targets in the custodian picker.

6.1.1.3 Configure Data Source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you'll configure all sources in the step. Switch between each source by clicking the name of the data source in the left navigation menu. Clicking **Next** and **Previous** also moves you through the data sources. Select individual data sources by clicking on the checkbox and then using the right arrows to select them. After selecting the data sources to configure, fill out the criteria. Each data source has different criteria to enter.

Data source criteria

Add criteria to collect specific data. To configure the data sources, complete the following fields:

- **Select and unselected tabs** - choose the data sources to collect from by moving unselected data sources to the selected list.
- **Field** - choose the field to filter on within the data source.

Notes: This field is only required when a calendar source is selected.

- **Operator** - choose an operator such as equals, contains, greater than, or less than.
- **Value** - enter a value to find in the selected field.

The screenshot displays the 'Data Sources' step (3) of a four-step process. The interface is titled 'Office365 Outlook Mailbox' and shows two data source cards. The left card is empty, showing '0 - 0 of 0' items. The right card contains one source with a 'Filter' field and a 'Relativity Test' checkbox. Below the data sources is the 'Office365 Outlook Mailbox Criteria' section. It includes a note: 'If no criteria is selected, all results will be collected by default. All dates are in Coordinated Universal Time (UTC)'. The criteria form has fields for 'Field *' (a dropdown menu), 'Operator *' (a dropdown menu), and 'Value *' (a text input). A checkbox is checked: 'Collect all emails with attachments regardless of criteria.' An 'Add Criteria' button is at the bottom of the criteria form. At the bottom of the entire interface are buttons for 'Previous', 'Save', 'Save and Close', 'Cancel', and 'Next'.

After selecting field options, you must click **Add Criteria**. Add multiple criteria to search data sources. Things to know about criteria:

- Each criteria is then separated by an AND operator.
- Leave the data source criteria empty to collect all data from the sources.

Criteria

Filter the data you want to collect by adding criteria. The criteria options change based on the selected data source.

Bloomberg Chat

Setting criteria for Bloomberg Chat is not required.

Criteria	Operators
Start Date	Equals
End Date	Equals

Bloomberg Email

Setting criteria for Bloomberg Email is not required.

Criteria	Operators
Start Date	Equals
End Date	Equals

Google Chat

Google Drive

Google Gmail

Google Groups

Microsoft 365 Archived Mailbox

Microsoft 365 Outlook contact operators

Microsoft 365 Outlook calendar operators

Microsoft 365 OneDrive operators

Microsoft 365 Outlook Mailbox operators

Microsoft 365 Teams operators

Collecting preserved files

Slack operators

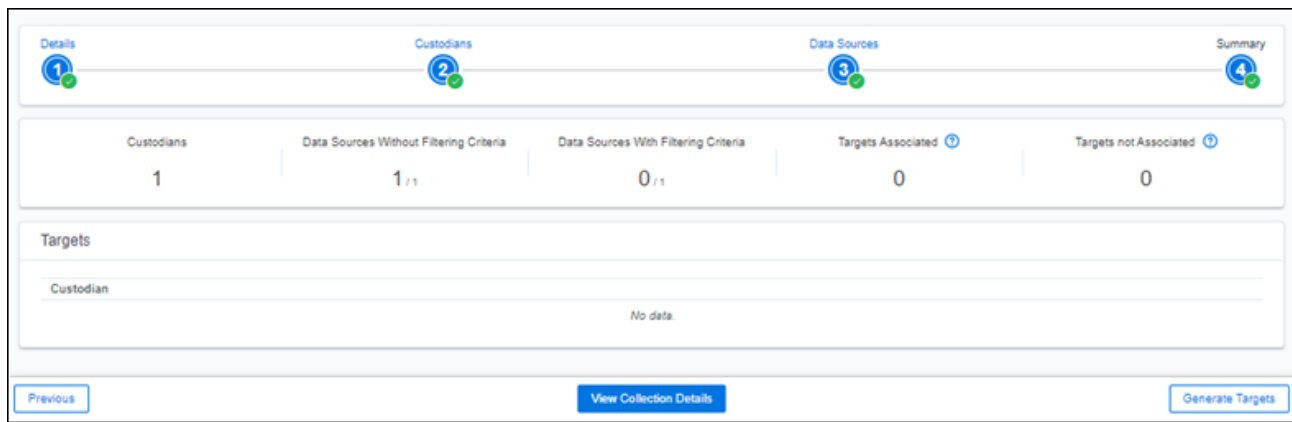
X1 Email operators

X1 File operators

6.1.1.4 Collection Summary

Complete the creation of the collection by reviewing all steps, custodians, data sources, and targets, before finalizing. If custodian targets weren't created before started the project, click **Generate Targets**. Clicking Generate Targets will check to see if targets exist for the custodians you've selected for collection. If the targets do not exist, Collect will automatically create them based on the email address contained in the Entity record for each custodian.

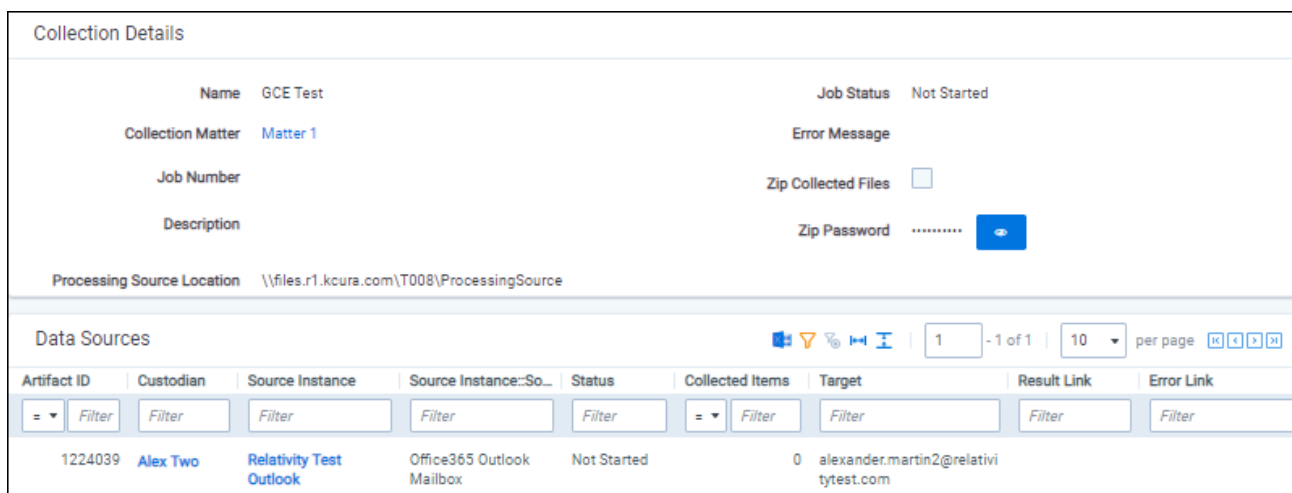
Complete the collection setup by clicking **View Collection Details**. Once you finish creating the collection, it redirects you to the Collection Details page. From the Collection Details page, you can run the collection from the [Collection Summary above](#). For more information, see Collection Console.



6.2 Viewing or editing collection details

You can display the collection details by clicking the name of a collection on the Collections tab. Collection also displays these details immediately after you add a new collection. On the Collection Details page, the buttons at the top of the page to edit, delete, or perform other collection tasks. Editing a collection takes you to the first step in the wizard. For more information, see [Using the Collect wizard on page 18](#).

Note: Once a collection has started, the collection can't be edited and is locked in read-only mode.



- **Collection Details** - lists the information that you entered or selected when you created the collection:
 - **Name** - the name given to the collection.
 - **Collection Matter** - the matter used in the collection.
 - **Job Number** - a number assigned to the job for reporting purposes.
 - **Description** - a description of the collection used for reporting purposes.
 - **Job Status** - the status of the collection (New, Not Started, Started, Completed, Error, Completed with Errors)

- **Collection Console** - displays buttons that you can use to perform the following tasks. See [Collect console on the next page](#).
- **Data Sources** - lists all the collection activities associated with this collection.
 - **Custodian** - the custodian associated with the collection.
 - **Data Sources Name** - the name of the data source associated with the collection.
 - **Data Source Target** - the name of the target associated with the collection.
 - **Status** - displays one of the following statuses:
 - **Not Started** - the collection has not been started.
 - **Started** - the collection is in progress.
 - **Completed** - the collection is done.
 - **Completed with Errors** - the collection of the target completed and one or more targets had errors. For more information, see the [Errors report on page 27](#).
 - **Error** - the collection failed. For more information, see [Collect reports on page 27](#).
 - **Collected Items** - the number of email files collected from the target.
 - **Target** - the custodian target associated with the data source.
 - **Result Link** - a Comma Separated Values file download listing all individual items collected from the target. It contains all of the associated metadata for each collected item as well. If no results, the file is empty. For more information, see [Collect tab on page 18](#).
 - **Error Link** - a Comma Separated Values file download listing any individual items that couldn't be collected because of errors during the collection. The report provides as much metadata as it can along with as much error information as we can get from the source to help identify what caused the error. If no errors, the file is empty. For more information on errors, see [Collect tab on page 18](#).

6.2.1 Storing collected data

Selecting Yes on the Collect Files in ZIP field, your collected data will be containerized and put into a password protected compressed folder. The compressed folders separated by the custodian target collected. Each custodian target collect has its own folder. These folders will split when reaching a set size. The compressed folders are then stored in the processing staging area by default.

These compressed folders can be secured with a password. You can enter a password that you or another user needs to enter to open the compressed folder. These passwords are stored in the password bank and can be retrieved there at a later time.

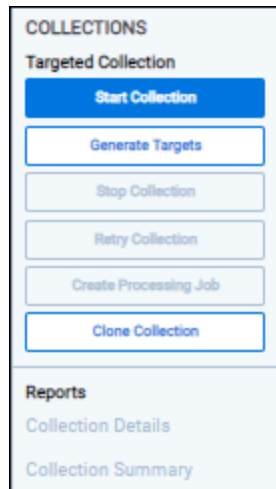
To export your collected data, use the RelativityOne Staging Explorer.

6.2.2 Viewing collected data

When Relativity collects the data, Relativity accepts the path names and file names that the source provides. On occasion, the collection source modifies the path name or file name.

6.3 Collect console

After completing a setup, run the collection with the collection console. Verify connection, start or stop a collection, and view a collection report from the Collection console on the Collection Details page.



6.3.1 Generate Targets

Generate the targets to retrieve all known Collect targets based on the custodians and data sources selected.

Click the **Generate Targets** button to ensure you are using the latest target set. Clicking Generate Targets will check to see if targets exist for the custodians you've selected for collection. If the targets weren't created manually, Collect will automatically create them based on the email address contained in the Entity record for each custodian. The targets will automatically generate when reaching the Summary Step of the Collect Wizard, but the console button prevents returning to the Collect Wizard.

6.3.2 Start Collection

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

6.3.3 Stop Collection

Click **Stop Collection** to end the collection project that is currently running. Once this button is clicked, a warning pop-up message appears to confirm that you want to stop. If the collection is stopped, the collection cannot be restarted.

6.3.4 Retry Collection

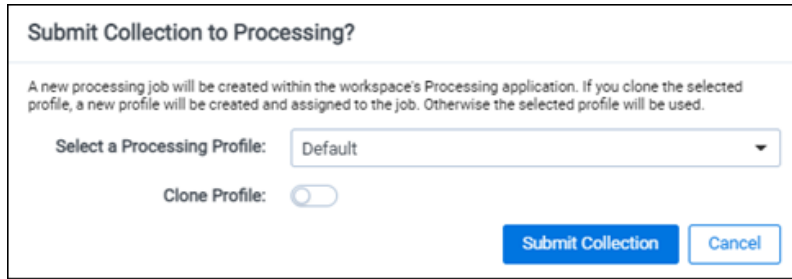
The Retry Collection button is only available when a collect job doesn't complete because of errors. Click **Retry Connection** to start another collect job that only retries the targets that have failed. Targets that completed successfully won't be retried.

6.3.5 Create Processing Job

Click **Create Processing Job** to create a processing set from the collected documents from the data sources. Locate these documents in the Processing Source Location set in Collection Details.

When you click the Create Processing Job button, a pop-up window displays with two fields:

- **Select a Processing Profile** - select a processing profile available in the drop-down menu.
- **Clone Profile** - toggle off to use the selected processing profile or toggle on to clone the selected processing profile and use the clone profile in conjunction with the processing set that is created.



Submit Collection to Processing?

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

Select a Processing Profile:

Clone Profile:

After selecting a processing profile and deciding on cloning the profile, click the **Submit Collection** button. Once the collection is submitted, Relativity creates a Processing Set with the same name as the collection job. The Processing Set includes all data that was collected in the collection job.

6.3.6 Clone Collection

Click the Clone Collection button to duplicate the open collect job. Any collect job that has a status other than New can be cloned.

After clicking the Clone Collection button, a pop-up modal displays the progress and completion of the clone.

Once the job is cloned, it is placed in the Not Started status and can be found in the Collections list under the same name with "Cloned - YYYY-MM-DD HH.MM.SS" attached to the end. All collection totals for the cloned job associated targets are reset to zero. The Collection Detail Custodian Target fields are reset to 0. The cloned collect job will also generate the new targets.

6.3.7 Reports

Collect includes comprehensive reporting capabilities that you can use to view information about your collections. You can generate these reports in the collection console within a collection project. Click on the name of a report to download. When generating a report, Relativity downloads different files through your browser. For more information on specific reports, see [Collect reports on the next page](#).

7 Collect reports

Collect offers comprehensive reporting capabilities that you can use to view information about collections. You can set options to generate these reports based on matter and collection as well as other combinations.

Note: If you've developed and used a new data source plugin using the Collection API, the Targeted Collection Activity Report reports on the new data source or sources accordingly.

7.1 Running reports

You can generate these reports in the collection console within a collection project. Click on the name of a report to download. Locate the Collection Summary and Collection Details report in the collection console. Locate the Results and Error report in the Data Sources table on the Collection Details page.

When generating a report, Relativity downloads different files through your browser.

7.1.1 Collection Summary report

The Collection Summary report includes the target, target status, number of items collected, and the collection size. The report is grouped by custodians. Grouping by custodians makes it easy to sort the targets for each custodian with subtotals for each custodian. Grand totals are at the end of the report. The report downloads as a PDF file.

This report also includes filters that were used at any point in the collection. For example, if a modification data that is great or equals to 1/1/2010 is added at the _____ criteria level, then that filter is listed below the summary report table.

7.1.2 Collection Details report

The Collection Details report includes two files: the first file includes the successfully collected results of all items and their metadata. The second file includes the errored collection data. The error file includes as many of the items and as much of the items' metadata as it can. The report downloads as a CSV file.

This report, both files, is also stored in the assigned Azure AD file share. It is included in the collection output.

7.1.3 Results report

7.1.4 Errors report

A Comma Separated Values file download of the errors that occurred during the collection from the target. If no errors occurred, the file is empty.

If the application is reporting errors with requests, creating objects, or parsing, check for correct permissions, check for healthy connections, and check if the fileshare is working. If the setup is correct, start diagnosing errors.

7.1.4.1 Errors.csv

The report file lists one error per line. Each item is listed with an error ID alongside the message of the error that caused the item failure. Per-item errors only occur in the download phase of the collection; if an error occurs before (for example, if data is unavailable during our check) or after (for example, the worker cannot write the results.csv file to the fileshare) then there will be no record in the errors.csv report.

8 Collect Store

Large volumes of raw collected evidence can be stored in the RelativityOne Store instead of being processed right away. Migrating collected data to storage before processing or review reduces consumption of physical space and reduces RelativityOne resources during an upgrade. From RelativityOne Store, you can process or start reviewing the data at a more suitable time. For more information, see Store on the RelativityOne documentation site.

When wanting to store collected data, select the Store option as the processing source location as the collection output in the Collect Details step of the Collect wizard. For more information, see [Using the Collect wizard on page 18](#).

8.1 Moving collected data into storage

When creating a collection job, you have to select a Processing Source Location. The Store option is available in the Processing Source Location drop-down menu within the first step of the Collect Wizard. For more information on the Processing Source Location, see [Using the Collect wizard on page 18](#).

8.2 Exporting collected data

When it's necessary to export the data, the user needs to use the RelativityOne Staging Explorer to export the collected data located in Store. For more information, see RelativityOne Staging Explorer on the RelativityOne documentation site.

Before using the RelativityOne Staging Explorer, the data can be containerized in a compressed folder if option is selected so the metadata of the collection doesn't change when it is exported.

9 Monitor

Monitor pending, running, and completed collect jobs in the Monitor tab. The Monitor page only tracks collect jobs from the last 24 hour time range.

The queued column lists the created collect jobs that haven't started. The running column lists collect jobs in progress and with their current progress displayed in a status bar. The completed column lists collect jobs completed successfully, completed with errors, the amount of data collected, and the elapsed time.

Proprietary Rights

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

©2021. Relativity ODA LLC. All rights reserved. Relativity® is a registered trademark of Relativity ODA LLC.