

# Relativity Collect - Microsoft 365

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# Table of Contents

<b>1 Collect</b>	<b>4</b>
<b>2 Installing Collect</b>	<b>5</b>
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
<b>3 Matters</b>	<b>8</b>
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
<b>4 Custodian targets</b>	<b>10</b>
4.1 Custodians	10
4.2 Fields	11
4.3 Custodian targets	11
4.3.1 Creating a custodian target	11
4.3.2 Generating targets in the wizard	12
4.4 Target status	12
4.4.1 Reviewing collection targets	12
<b>5 Accessing Microsoft 365 tenants</b>	<b>13</b>
5.1 Registering the application	13
5.1.1 Running concurrent collection jobs	13
5.1.2 Registering the Collect application and setting permissions	13
5.2 Finding Azure credentials	15
5.3 Limiting Application Registration access to accounts	16
5.4 Revoking Application Access	16
5.4.1 Revoking access via Powershell	16
<b>6 Creating a collection data source</b>	<b>18</b>
6.1 Creating a collect data source	18

6.1.1 Data source types and properties .....	19
<b>7 Collect tab .....</b>	<b>24</b>
7.1 Creating a collection .....	24
7.1.1 Using the Collect wizard .....	24
7.2 Viewing or editing collection details .....	30
7.2.1 Storing collected data .....	32
7.2.2 Viewing collected data .....	32
7.3 Collect console .....	33
7.3.1 Generate Targets .....	33
7.3.2 Start Collection .....	33
7.3.3 Stop Collection .....	33
7.3.4 Retry Collection .....	34
7.3.5 Create Processing Job .....	34
7.3.6 Clone Collection .....	34
7.3.7 Reports .....	34
<b>8 Collect reports .....</b>	<b>35</b>
8.1 Running reports .....	35
8.1.1 Collection Summary report .....	35
8.1.2 Collection Details report .....	35
8.1.3 Results report .....	35
8.1.4 Errors report .....	36
<b>9 Collect Store .....</b>	<b>38</b>
9.1 Moving collected data into storage .....	38
9.2 Exporting collected data .....	38
<b>10 Monitor .....</b>	<b>39</b>
<b>11 Glossary .....</b>	<b>41</b>

# 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.

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**Note:** This document covers the Microsoft 365 source.

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- **Microsoft 365 OneDrive**- collect documents from within a custodian's OneDrive account.
- **Microsoft 365 Outlook Mailbox** - collect emails and attachments from within a custodian's Outlook mailbox.
- **Microsoft 365 Outlook Calendar** - collect appointments and meeting from within a custodian's Outlook calendar.
- **Microsoft 365 Outlook Contacts** - collect contact and contact information from within a custodian's Outlooks contacts list.

The screenshot shows the 'Collection Details' configuration page. It includes fields for Name, Job Number, Collection Matter (with Edit and Add buttons), Processing Source Location (dropdown), Description (text area), Zip Collected Files (toggle), Receive Progress Notifications (toggle), Zip Password (with Show Password checkbox), and Notification Address. Below this is the 'Data Source Types' section, which instructs the user to select at least one data source. Four options are shown with green checkmarks: Office365 OneDrive, Office365 Outlook Calendar, Office365 Outlook Contacts, and Office365 Outlook Mailbox.

## 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 Collection 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 Collection from the Application Library. See [Installing Collect below](#).
2. Enable access for Office 365 tenants. See [Accessing Microsoft 365 tenants on page 13](#).

### 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.

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**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.

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### 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 Collection 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](#).

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

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#### 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.

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**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.

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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 Relativity Collect on the Select Library Application dialog. This dialog only displays applications added to the Application Library. If Relativity 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"> <li>■ <b>Collection</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Custodian</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Custodian Target</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Custodian Target Result</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Request</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Source Instance</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Source Type</b> – View, Edit, Add</li> <li>■ <b>Collection Detail Summary</b> – View, Edit, Add</li> <li>■ <b>Collection Matter</b> – View, Edit, Add</li> <li>■ <b>Collection Source Instance</b> – View, Edit, Add</li> <li>■ <b>Collection Source Instance Parameter</b> – View, Edit, Add</li> <li>■ <b>Collection Source Type</b> – View, Edit, Add</li> <li>■ <b>Collection Source Type Parameter Type</b> – View, Edit, Add</li> <li>■ <b>Collection Source Type Criteria</b> – View, Edit, Add</li> <li>■ <b>Custodian Target</b> – View, Edit, Add</li> <li>■ <b>Entity</b> – View, Edit, Add</li> <li>■ <b>Custom</b> – View, Edit, Add</li> </ul>	<ul style="list-style-type: none"> <li>■ <b>Entities</b></li> <li>■ <b>Collect</b> <ul style="list-style-type: none"> <li>○ Matters</li> <li>○ Custodian Targets</li> <li>○ Collections</li> <li>○ Status Summary</li> <li>○ Target Status</li> <li>○ Collection Admin</li> <li>○ Monitor</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>■ None</li> </ul>

## 3 Matters

In Collect, a matter represents a legal action or case requiring you to collect electronic data from sources such as Microsoft 365. 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.

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**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 24](#).

#### 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**.

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

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- **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 24](#).
  - **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 are associated with a collect job. You can create custodians and custodian targets on their respective tabs, or you can create them when adding a new collection.

The custodian target is the combination of data sources and custodians. The custodian target is an endpoint from which RelativityOne Collect can connect to. For example, a custodian's Microsoft Outlook account is a custodian target.

A custodian in the collection has to exist or you need to create the custodian. This custodian also needs to be related to the data source. The data source is the location of files you are looking to collect. In this document, the source is Microsoft 365. When the custodian and the data source unites in Collect, Collect then connects to the specific custodian in the data source.

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**Note:** Custodian targets can be automatically built for Microsoft 365 and this process can be skipped. The auto-generation of targets is based on the custodian's email address. If the email address in Relativity matches the data source, the custodian target can be auto-generated in the project wizard. Use the information below to manually generate custodian targets.

---

## 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. To create a new custodian:

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 on the next page](#).
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.

---

Collect Custodian

Type\*  Person  Other

First Name\*

Last Name\*

Email

## 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 Custodian targets

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.

### 4.3.1 Creating a custodian target

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 19](#).
4. Enter the custodian's email address in the **Target** field.

The screenshot shows a form titled "Custodian Target Information". It contains four main input fields, each with an asterisk indicating it is required: "Name", "Entity", "Data Source", and "Target". The "Entity" field is unique as it includes a "Select" button and an "Add" link. The "Data Source" field is a dropdown menu. All other fields are standard text boxes.

### 4.3.2 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 30](#).

## 4.4 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.

### 4.4.1 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 33](#). 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 36](#).
- **Error** - the collection did not run successfully and couldn't collect from the target.

## 5 Accessing Microsoft 365 tenants

Register the Relativity Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. This ID and secret are used to configure data sources in Collect and provides access to the Office 365 tenants. You can register the application through Azure Portal or by registering the application permissions through the Microsoft App Registration Portal. After registering the application, request administrator consent. From there, it is possible to revoke application access.

### 5.1 Registering the application

Allow Relativity access by first registering the application in Microsoft 365. Register the application permissions through Azure Portal.

#### 5.1.1 Running concurrent collection jobs

Collect supports one active collection job per registered Microsoft 365 Application ID. You can register the Relativity Collect application in Microsoft 365 more than one time and each registration is assigned a unique Application ID. If you are going to be running collections in more than one workspace, consider creating a separate Relativity Collect application registration in Microsoft 365 for each workspace in your Relativity instance.

Example 1

All data sources in Workspace A use Application ID 123456

All data sources in Workspace B use the same Application ID 123456

If a collection job is running in Workspace A, then no collection jobs can be started in Workspace B until the job in Workspace A finishes.

Example 2

All data sources in Workspace A use Application ID 123456

All data sources in Workspace B use Application ID 098765

Both workspaces can run a collection job at the same time since the Application IDs are different.

#### 5.1.2 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

Start registering your app by following the steps below:

---

**Note:** This needs to be done on the client side by an Azure user with sufficient rights.

---

1. Open your [Azure Portal](#).
2. Click **More Services**.
3. Search for and select **Azure Active Directory**.
4. In the left-navigation menu, click **App registrations**.
5. Click **New Registration**.  
This will open the Register an application page.

6. Enter an application name in the **Name** field.
7. Select **Accounts in this organizational directory only** as the supported account type.
8. Enter the redirect URL, `http://localhost/`, as the sign-on URL.
9. Click **Register**.

For more information on registering an application in Azure, see Microsoft's documentation.

From the app's page, add permissions to the web API. To add permissions, follow the steps below:

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Application Permissions**.
5. Select the following options from the Application Permissions section:
  - Calendars. - Read.
  - Contacts. - Read.
  - Files. - Read.All.
  - Mail. - Read.
  - Sites. - Read.All
  - User. - Read.All
6. Click **Add permissions**.
7. Click **Grant Permission**.

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

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

---

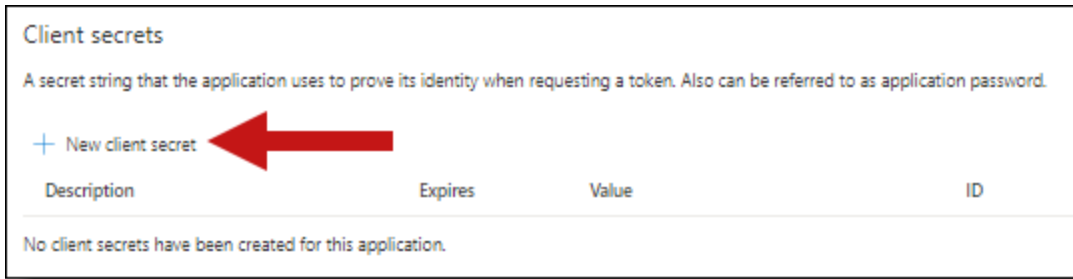
**Notes:** If you do not have the ability to grant Admin consent for application permissions, you will need to find an Admin that can consent.

---

Once clicked, the window will show all permissions granted.

1. Verify all permissions have been granted.
2. Click **Accept** to grant the permissions.
3. In the left navigation menu, click **Certificates & secrets**.

4. Click **New client secret**.



5. Enter a description in the Description text box.
6. Set the expiration time frame to **Never**.
7. Click **Add**.
8. Click on the clipboard and copy secret to clipboard to paste in your text document.

---

**Notes:** In this step you should copy the secret and save it as you will need it to set up your data sources in Collect. Microsoft will only show this secret this one time, there is no way to recover a secret if it is forgotten or lost.

---

Make a note of the application ID that Microsoft assigned to the app registration. This ID is also required for setup of data sources in Collect.

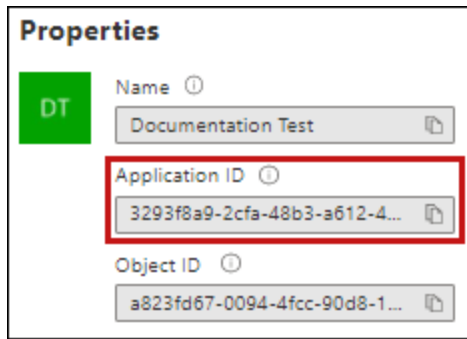
Provide your Relativity Admin the Application ID and the Client Secret for setup of Relativity Collect.

## 5.2 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below:

In the [Azure Portal](#),

1. Click Azure Active Directory.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.  
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Copy the Application ID.



## 5.3 Limiting Application Registration access to accounts

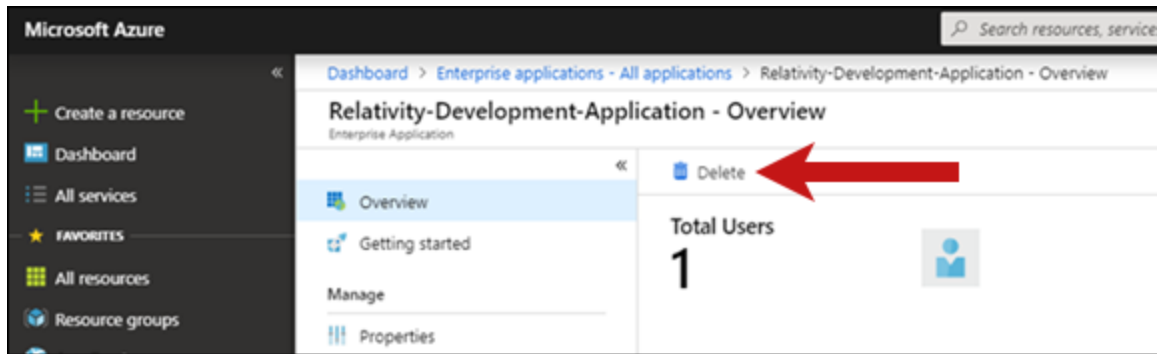
Limit the access of Relativity Collect to specific Microsoft user accounts and mailboxes by using the New-ApplicationAccessPolicy Powershell cmdlet. For more information, see Microsoft documentation.

## 5.4 Revoking Application Access

The application can be revoked from <https://portal.azure.com> or by using a PowerShell script. For more information, see [Microsoft's documentation](#).

To revoke access from <https://portal.azure.com>,

1. Navigate to **Enterprise Application**.
2. Click **All applications**.
3. Locate your application.
4. Press the application link.
5. Press the **Delete**.



Relativity Collect no longer has access.

### 5.4.1 Revoking access via Powershell

Revoking access via Powershell can be done using the Remove-MsolServicePrincipal script. See below for an example of retrieving and deleting an application registration using Powershell.



```
Get-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

```
ExtensionData : System.Runtime.Serialization.ExtensionDataObject
```

```
AccountEnabled : True
```

```
Addresses : {}
```

```
AppPrincipalId : 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

```
DisplayName : Relativity-Development-Application
```

```
ObjectId : 51798fb3-e72c-4373-8c63-6e7d0dd63ad7
```

```
ServicePrincipalNames : {19ab8a2e-ccce-4fa8-a9ee-eb16e220d602}
```

```
TrustedForDelegation : False
```

```
Remove-MsolServicePrincipal -AppPrincipalId 19ab8a2e-ccce-4fa8-a9ee-eb16e220d602
```

## 6 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.

### 6.1 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 Microsoft 365.

It is possible to collect data placed on a preservation hold through Relativity Legal Hold. For more information on preserving Microsoft 365 data using Legal Hold, see the Legal Hold guide.

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:
  - **Microsoft 365 OneDrive** - select to collect data from OneDrive accounts. For more information, see [Microsoft 365 OneDrive on page 20](#).
  - **Microsoft 365 Outlook Calendar** - select to collect meetings and appointments from a custodian's Outlook calendar. For more information, see [Microsoft 365 Outlook Calendar on page 21](#).
  - **Microsoft 365 Outlook Contacts** - select to collect explicit contacts from a custodian's Outlook contact list. An explicit contact is one that the custodian manually added to their contact list. For more information, see [Microsoft 365 Outlook Contacts on page 20](#).
  - **Microsoft 365 Outlook Mailbox** - select to collect data from Microsoft's email application. For more information, see [Microsoft 365 Outlook mailbox on page 21](#).

The screenshot shows a web form with two main sections: 'Data Source Information' and 'Settings'. In the 'Data Source Information' section, there is a text input field for 'Name' and a dropdown menu for 'Type' which is currently set to 'Office365 Outlook Mailbox'. The 'Settings' section contains three text input fields: 'Domain', 'Application Id', and 'Application Secret'. All fields are marked with an asterisk to indicate they are required.

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**Note:** Collect automatically collects any data that is preserved due to an in-place hold or litigation hold. Data on a hold is stored in a preservation library and separate folders. For more information, see [Microsoft Retention Policies](#).

---

4. Enter the following information in Settings:

Microsoft Settings

- **Domain** - enter the Domain name of the Microsoft 365 tenant the collection is intended for.
- **Application Id** - enter the Application ID created during registering the Collect application in Microsoft 365.
- **Application secret** - enter the Application Secret created during registering the Collect application in Microsoft 365. For more information, see [Accessing Microsoft 365 tenants on page 13](#).Google Workspace

5. Click **Save**.

Once the data source is set up, you'll see the data source information on the Collect Admin page.

### 6.1.1 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 28](#).

### 6.1.1.1 Microsoft 365 OneDrive

The following table lists the filter criteria support for OneDrive collections.

**Note:** Relativity needs to be registered in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 13](#).

Filter criteria

Property	Description	Example
File Extension	When you use the File Extension property in a query, the search returns all files that contain the entered file extension.	If you search "Contains docx," your results include all Microsoft Word files saved with that extension.
Creation Date	When you use the Creation Date property in a query, the search returns all messages that equal/doesn't equal, greater/less than the date entered.	If you search "Greater Than 1/1/2001," your results include all messages created after January 1, 2001.
Modification Date	When you use the Modification Date property in a query, the search returns all updated files that equal/doesn't equal, greater/less than the date entered.	If you search "Less Than 1/1/2020," your results include all files modified before January 1, 2020.
File Path	When you use the File Path property in a query, the search returns all messages equals/does not equal or contain the folder path entered.	If you search "Contains C:-documents/Relativity," your results include all files within the listed folder and any folder beyond the file path entered.
File Name	When you use the File Name property in a query, the search returns all files that equals/does not equal or contain the value entered.	If you search "Equals Important_Document," your results include all files with that text in the file-name.
Keyword Search	When you use the Keyword Search property in a query, the search returns all files containing the searched text. For more information, see <a href="#">Criteria on page 28</a> .	If you search "Relativity," your results include all files that contain the searched text in the file.

### 6.1.1.2 Microsoft 365 Outlook Contacts

These properties are available for users to configure contacts (also called personal contacts) located in the personal address book of a user's mailbox. Relativity collects all contacts and no filter criteria is necessary.

Microsoft collects cached contacts, which are not contacts the user implicitly creates in Outlook. These contacts aren't collected by Relativity.

---

**Note:** Relativity needs to be registered in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 13](#).

---

### 6.1.1.3 Microsoft 365 Outlook Calendar

The following table lists the filter criteria supported for calendar collections. Entering the start date and end data criteria is required for calendar collections.

---

**Note:** Relativity needs to be registered in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 13](#).

---

Filter criteria

Property	Description	Example
Start Date	When you use the Start Date property in a query, the search returns calendar items 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 calendar items 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:** The maximum supported date range is five years. Cannot progress to the next step if date range is longer than five years.

---

### 6.1.1.4 Microsoft 365 Outlook mailbox

Relativity collects all items in visible folders within Outlook's inbox and custom folders. Hidden folders cannot be collected.

Relativity Collect differs from collections run in Microsoft's Security and Compliance Center. One difference is that Relativity only collects visible folders within Outlook's inbox folder and custom folders. Visible folders don't include conversation history, notes, or tasks. Archived mailboxes are also not able to be collected, but an archived mailbox can be restored and then collected.

Another difference is the separation of calendar items and outlook contacts. Microsoft combines those two items with the Outlook mailbox. Relativity separates them into different data sources. For more information, see [Microsoft 365 Outlook Contacts on the previous page](#) and [Microsoft 365 Outlook Calendar above](#).

The following table lists the filter criteria supported for mailbox collections.

---

**Note:** Relativity needs to be registered in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 13](#).

---

Filter criteria

Property	Description	Example
Email To	When you use the Email To property in a query, the search returns all messages that contain the text in the Email To field.	If you search “@example.com,” your results include all messages sent to people with the @example.com in their email address.
Email From	When you use the Email From property in a query, the search returns all messages that contain the text in the Email From field.	If you search “@example.com,” your results include all messages sent by people with the @example.com in their email address.
Email CC	When you use the Email From property in a query, the search returns all messages that contain the text in the Email CC field.	If you search “@example.com,” your results include all carbon copied messages received by people with the @example.com in their email address.
Email BCC	When you use the Email From property in a query, the search returns all messages that contain the text in the Email BCC field.	If you search “@example.com,” your results include all blind carbon copied messages received by people with the @example.com in their email address.
Email Sent Date	When you use the Email Sent Date property in a query, the search returns all messages that equal/doesn't equal, greater/less than the date entered.	If you search “Greater Than 1/1/2001,” your results include all emails sent after January 1, 2001.
Email Received Date	When you use the Email Received Date property in a query, the search returns all messages that equal/doesn't equal, greater/less than the date entered.	If you search “Less Than 1/1/2020,” your results include all emails received before January 1, 2020.
Keyword Search - Email Body	When you use the Keyword Search – Email Body property in a query, the search returns all messages email message contains the text you're searching for. For more information, see <a href="#">Criteria on page 28</a> .	If you search “Dear John,” your results include all messages that contain the text in email body. Note that this is not the same as searching for “Dear” OR “John”. In order to do that, you need to separate keyword by OR
Keyword Search - Email Metadata	When you use the Keyword Search – Metadata property in a query, the search returns all messages which the Email To, Email From, Email CC, or Email	If you search kriter@example.com, your results include all messages that have the text in the Email To, Email From, Email CC, or Email BCC fields.

Property	Description	Example
	BCC fields contain the text you're searching for.	
Has Attachments	When you use the Has Attachments property, the search returns emails with or without attachments based on the True or False setting.	If you mark "True," your results include all messages that include an attachment.
Parent Folder Path	When you use the Parent Folder Path property in a query, the search returns all messages in the folder that equal, doesn't equal, or contains the name entered. This includes all child folders within the parent folders.	If you search "RelativityOne," your results include all emails in the folder and all emails within the child folders listed under the "RelativityOne" parent folder.
Subject	When you use the Subject property, the search returns all messages that contains the search word or phrase in the email's title.	If you use the Subject property in a query, the search returns all messages that the subject line contains the text you're searching for. In other words, the query doesn't return only those messages that have an exact match. For example, if you search for subject "Quarterly Financials," your results include messages with the subject "Quarterly Financials 2018."

## 7 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 34](#).

### 7.1 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 30](#).

For information on running concurrent Microsoft 365 collection jobs, see [Accessing Microsoft 365 tenants on page 13](#).

#### 7.1.1 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.

##### 7.1.1.1 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 38](#).



- **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 32](#).
- **Zip Password** - enter a password that is required by anyone attempting to decompress the ZIP64 container files.

---

**Note:** If Relativity 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 19](#).

(Click to expand)


### Collection Details

<p>Name * <input type="text"/></p> <p>Collection Matter * <span>Select...</span> <span>Edit</span> <span>Add</span></p> <p>Processing Source Location * <span>Select a source location...</span></p> <p>Zip Collected Files <input type="checkbox"/></p> <p>Zip Password <input type="password"/> <input type="checkbox"/> Show Password</p>	<p>Job Number <input type="text"/></p> <p>Description <div style="border: 1px solid #ccc; height: 50px;"></div></p> <p>Receive Progress Notifications <input type="checkbox"/></p> <p>Notification Address <input type="text"/></p>
--	---


---

### Data Source Types


Please select at least one data source \*




Office365 OneDrive



Office365 Outlook Calendar



Office365 Outlook Contacts



Office365 Outlook Mailbox

### 7.1.1.2 Custodians



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

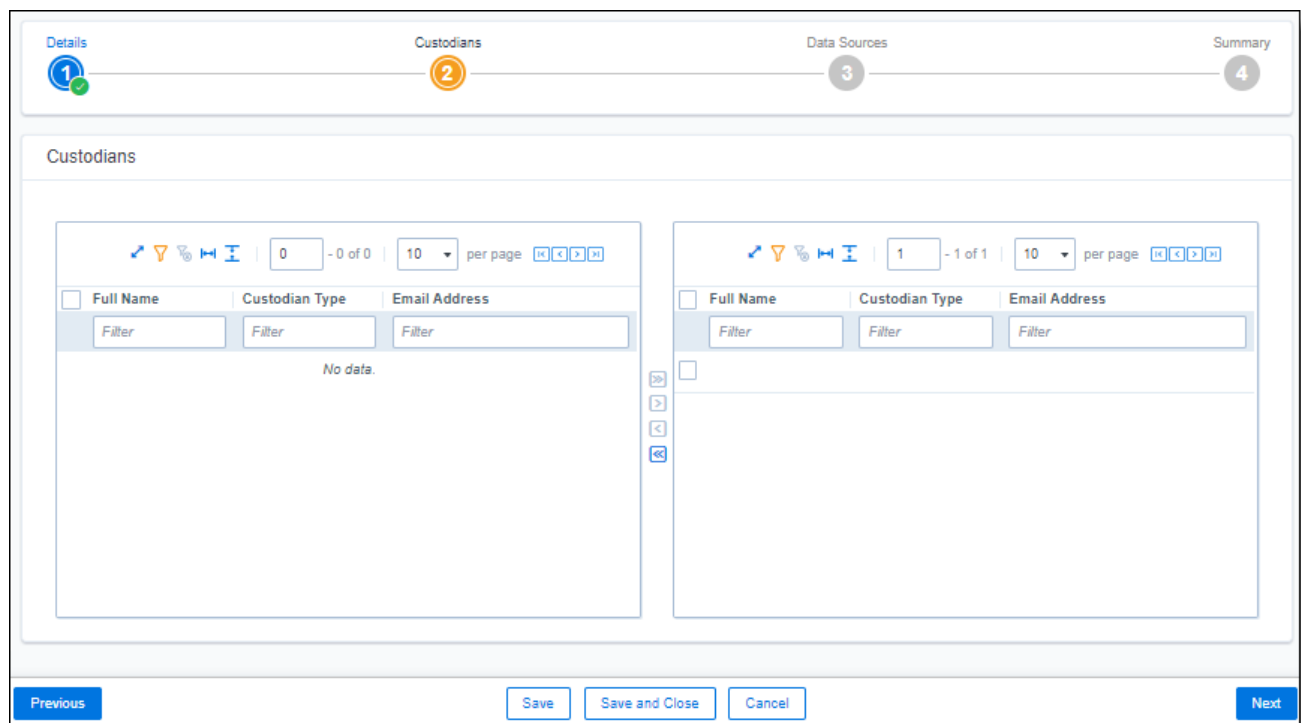
1. From the Unselected custodians table, use the column filters to locate custodians.
2. Click a check box next to a custodian.

---

**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.

---

### 7.1.1.3 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 'Office365 Outlook Mailbox' configuration page in Relativity One. At the top, there are four tabs: 'Details' (1), 'Custodians' (2), 'Data Sources' (3), and 'Summary' (4). The 'Data Sources' tab is selected, showing two data source lists. The left list is empty, and the right list contains one source with a filter field. Below the lists is the 'Office365 Outlook Mailbox Criteria' section, which includes fields for Field, Operator, and Value, along with a checkbox for 'Collect all emails with attachments regardless of criteria.' and an 'Add Criteria' button. At the bottom, there are navigation buttons: 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.

### Microsoft 365 Outlook contact operators

All Outlook contacts are returned. There is no search criteria for Outlook contacts.

### Microsoft 365 Outlook calendar operators

Start and end dates are required when using an Microsoft 365 Outlook Calendar data source. The maximum supported date range is five years. For example, it can be 1/1/2001 to 12/31/2006 but not 1/1/2000 to 12/31/2007.

Criteria	Operators
Start Date	Equals
End Date	Equals

### Microsoft 365 OneDrive operators

When using search criteria to filter for Microsoft 365 OneDrive, different operators can return different results. Knowing the search operators is crucial.

The keyword search criteria uses the Search In operator. When using the Search In operator:

- Search for a phrase by entering the phrase without any OR operators into the Value text box.  
Example: acme corp contract
- Search for individual keywords by entering the keywords and separating them with an OR in the Value text box.  
Example: cat OR dog OR mouse

---

**Notes:** Enter the OR operator with all capital letters. Keywords and phrases should be added in lower case only.

---

- Keywords hit on matches and if a word is prefixed with a keyword.  
Example: "Work" will return "workday" and "workplace"

Criteria	Operators
File Extension	Equal, Does Not Equal, Contains
File Path	Equal, Does Not Equal, Contains
File Name	Equal, Does Not Equal, Contains
Creation Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Modification Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Keyword Search	Search In

**Note:** For email, the date a message was received by a recipient or sent by the sender. For documents, the date a document was last modified.

### Microsoft 365 Outlook Mailbox operators

When using search criteria to filter for Outlook Mailbox, different operators can return different results. For example, the search criteria uses Search In; it doesn't use Contains. When using the Search In operator:

- Search for a phrase by entering the phrase without any OR operators into the Value text box.  
Example: acme corp contract
- Search for individual keywords by entering the keywords and separating them with an OR in the Value text box.  
Example: cat OR dog OR mouse

**Notes:** Enter the OR operator with all capital letters. Keywords and phrases should be added in lower case only.

- Keywords hit on matches and if a word is prefixed with a keyword.  
Example: "Work" will return "workday" and "workplace"

When using the Parent Folder Name criteria, listing a parent folder includes the child folders in the returned results.

Criteria	Operators
Email To	Contains
Email From	Equals, Contains
Email CC	Contains
Email BCC	Contains
Email Sent Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Email Received Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Keyword Search	Search In
Has Attachments	Equals, Does Not Equal
Parent Folder Name	Equals, Does Not Equal, Contains
Subject	Contains

For more information, see [Microsoft Security and Compliance Center documentation](#).

#### Collecting preserved files

When running a collection with Microsoft data sources, all available files including preserved files are collected. No extra steps need to be taken to collect preserved files as they are automatically included in the collection. For more information on preserving data, see the Legal Hold guide.

When a Microsoft places a data source on a preservation hold, Microsoft creates a preservation hold library, a Recoverable Items folder. The addition of the Recoverable Items folder to Microsoft Exchange is

another folder that can be collected. Collect can collect this folder because the Removable Items folder is an additional folder within a Microsoft data source.

When emails and files are on a preservation hold in Microsoft 365, Microsoft preserves original copies of any deleted or modified items. Preserved emails are found in the Recoverable Items folder and preserved files are found in the Preservation Library. Collect automatically collects from these file locations.

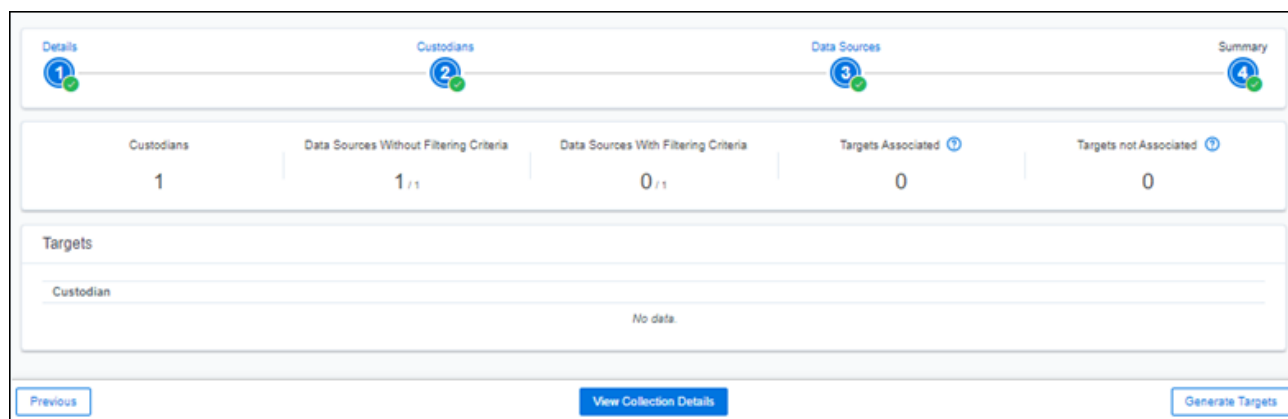
Relativity collects all versions of the document available in the preservation library. Collecting all versions of a document means that Relativity collects multiple versions of the same file with the corresponding SHA-256 hashes for each version of the data. If there were changes in the file version, the hash should be unique. For more information on hash identifiers, see [Collect tab on page 24](#).

Conversations in public or private channels are collected for each day in the date range regardless if the custodian participated in that channel on a given day.

#### 7.1.1.4 Collection Summary

Complete the creation of the collection by reviewing all steps, custodians, data sources, and targets, before finalizing. If Microsoft 365, 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.



## 7.2 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 24](#).

---

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

---

### Collection Details

Name	GCE Test	Job Status	Not Started
Collection Matter	Matter 1	Error Message	
Job Number		Zip Collected Files	<input type="checkbox"/>
Description		Zip Password	..... <input type="button" value="👁"/>
Processing Source Location	\\files.r1.kcura.com\T008\ProcessingSource		

---

### Data Sources

1 - 1 of 1 | 10 per page

Artifact ID	Custodian	Source Instance	Source Instance:So...	Status	Collected Items	Target	Result Link	Error Link
1224039	Alex Two	Relativity Test Outlook	Office365 Outlook Mailbox	Not Started	0	alexander.martin2@relativitytest.com		

- **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 page 33](#).
  
- **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 36](#).
    - **Error** - the collection failed. For more information, see [Graph Error Codes on page 36](#).
  - **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 24](#).
- **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 24](#).

## 7.2.1 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.

## 7.2.2 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.

### 7.2.2.1 Path names

When data is collected there is a 260-character limit on file paths and when it is reached, Relativity truncates the path name. The full path name for exported items includes the item's original location. If a truncated full path name already exists, a version number is added to the end of the file name; for example, statusmessage(2).msg.

### 7.2.2.2 File Names

Modifications of file names happens for documents that have been deleted from a Microsoft SharePoint or OneDrive for Business site that's been placed on a preservation hold. After a file on a site hold is deleted, the file document is automatically moved to the Preservation Hold library for the site, which is a folder created when the site was placed on hold.

#### Files names on a preservation hold

When the deleted document is moved to the Preservation Hold library, a randomly generated and unique ID is appended to the original file name of the document. For example, if the file name for a document is *FY2017Budget.xlsx* and that document is later deleted and then moved to the Preservation Hold library, the file name of the document that is moved to the Preservation Hold library is modified. For example, the file name is modified to something like *FY2017Budget\_DEAF727D-0478-4A7F-87DE-5487F033C81A2000-07-05T10-37-55.xlsx*.

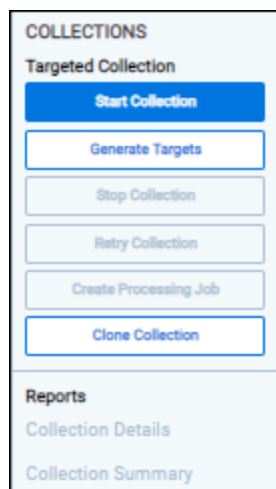
When a document on a site that's on hold is modified and versioning for the document library in the site has been enabled, a copy of the file is automatically created in the Preservation Hold library. In this case, a randomly generated and unique ID is also appended to the file name of the document that's copied to the Preservation Hold library.



The reason why file names of moved or copied documents to the Preservation Hold library is to prevent conflicting file names. For more information about placing a hold on sites and the Preservation Hold library, see [Overview of in-place hold in SharePoint Server 2016](#).

## 7.3 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.



### 7.3.1 Generate Targets

Generate the targets to retrieve all known Collect targets based on the custodians and data sources selected. These data sources include Microsoft 365.

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.

### 7.3.2 Start Collection

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

---

**Note:** Only one collection can be ran at a time.

---

### 7.3.3 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.

### 7.3.4 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.

### 7.3.5 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.

### 7.3.6 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.

### 7.3.7 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](#).

## 8 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.

---

### 8.1 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.

#### 8.1.1 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.

#### 8.1.2 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.

#### 8.1.3 Results report

The Results report is a CSV file download of the results collected from the target. If no results, the file is empty.

The Results report link for each target downloads as a CSV file that contains a list of all individual items collected. These items include emails, files, or etc. It contains all of the associated metadata for each item. If no items were collected the file is empty.

##### 8.1.3.1 Hash identifier - SHA-256

Inside the spreadsheet there is an electronic fingerprint named SHA-256. When collecting documents, Microsoft adds the SHA-256 hash identifiers and then stores the hashes. A user can verify the original file by matching the SHA-256 identifiers. For more information, see [Microsoft's Retention Policies](#).

The SHA-256 is included in the Results report file and the Collection details report files.

## 8.1.4 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.

### 8.1.4.1 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.

### 8.1.4.2 Graph Error Codes

The Graph Error Codes category of error codes will occur if there is an issue with Graph when downloading an item. For more information, see Microsoft's Graph Errors documentation. There are different error categories. Handle each category error following instructions below. If the suggested resolutions don't fix the issue or if the code is not listed, contact Relativity Support at [support@relativity.com](mailto:support@relativity.com).

#### Transient

Transient errors appear in the report if the Microsoft Graph API has received too many requests in too short a time. If these errors appear, then the collection is putting too much pressure on external services. Retry the collection later.

- activityLimitReached
- quotaLimitReached
- serviceNotAvailable

#### Authentication

These errors deal with authentication of the Collect application. Check the Microsoft Azure application associated with the collection source instance and ensure it has the proper permissions.

- accessDenied
- notAllowed
- unauthenticated

For more information, see [Accessing Microsoft 365 tenants on page 13](#).

#### Modification

Modification errors appear when data changes between discovery and download. For example, moving data would cause a modification error. Restart the collection to resolve the error.

- itemNotFound
- resourceModified

## File

The Microsoft Graph API prevents Relativity from collecting items marked as malware. Items marked as malware will always error. Relativity doesn't collect these files. To download these items, you must download them manually.

- `malwareDetected`

The other error codes shouldn't appear in Errors file, as they either deal with the uploading of data (which Collect doesn't do) or they deal with a malformed request, which indicates a bug. If they appear, contact Relativity Support at [support@relativity.com](mailto:support@relativity.com).

## HTTP Errors

This error category occurs alongside Graph errors, as well as in a few other cases. For example, an HTTP error occurs when a file stream doesn't download. If the suggested resolution does not fix the issue or if the code is not listed, contact Relativity Support at [support@relativity.com](mailto:support@relativity.com).

Of the HTTP error codes, here are examples of some that may appear:

- **400: Bad Request** - the application requested a resource improperly. If this occurs, contact Relativity Support at [support@relativity.com](mailto:support@relativity.com).
- **401: Unauthorized** - the application doesn't have the proper permissions and the app key is correct.
- **403: Forbidden** - the application doesn't have the permissions and the app key is correct. These may also be associated with attempting to download a file with malware (see `malwareDetected`).
- **404: Not Found** - an item was moved between discovery and downloading. Restart the collection.
- **429: Too Many Requests** – the application has received more requests than it can handle. Retry the collection later.
- **504: Gateway Timeout** – this is related to the stability of the tenant being collected from. Retry the collection again later.
- **509: Bandwidth Limit Exceeded** – the application cannot support the amount of bandwidth needed. Retry the collection again later.

## Other Errors

**InvalidOperationException** ("The item's downloaded hash does not match Microsoft's reported hash value.") – this occurs if the downloaded item's hash identifier and Microsoft's hash identifier differs. This error usually indicates something happened with the download that caused the data to become corrupted and can represent a transient error. Retry running the collection.

**ArgumentExceptions** ("Non-file attached to...") - these exceptions occur when something other than a file is attached to an event or message. Relativity does not collect these items.

There are messages indicating that there was an issue creating a VCard, MIME, or iCal object. These indicate that there was an error translating Microsoft's response on these items into files, and are usually bugs in the Collection application. contact Relativity Support at [support@relativity.com](mailto:support@relativity.com).

There are messages indicating problems writing files to the file share. In this case, download went correctly, but there is an issue with the Relativity File Share preventing the write. contact Relativity Support at [support@relativity.com](mailto:support@relativity.com).

## 9 Collect Store

Large volumes of raw collected evidence 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 24](#).

### 9.1 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 24](#).

### 9.2 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.

# 10 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.

The screenshot displays the Monitor tab interface, organized into three columns: QUEUED, RUNNING, and COMPLETED. Each column lists specific collect jobs with their status, progress, and details.

QUEUED	RUNNING	COMPLETED
<b>Test</b> <b>bco custodian 201 ALL</b> <ul style="list-style-type: none"><li>Beta Custodian201 <i>Relativity Test Outlook</i></li><li>Beta Custodian201 <i>Relativity Test OneDrive</i></li><li>Beta Custodian201 <i>Relativity Test Calendar</i></li><li>Beta Custodian201 <i>Relativity Test Contact</i></li></ul>	<b>bco custodian 203</b> 1 of 2 collections completed <ul style="list-style-type: none"><li><b>Beta Custodian203</b> <i>Relativity Test OneDrive</i> Completed 7762 files retrieved Elapsed time: 00:07:29</li><li><b>Beta Custodian203</b> <i>Relativity Test OneDrive</i> Retrieving 22987 out of 57501 files retrieved Estimated completion: 5/6/2019, 5:05:46 PM 39% 00:21:16</li></ul>	<b>T010 Test 1</b> <ul style="list-style-type: none"><li><b>Beta Custodian202</b> <i>Relativity Test OneDrive</i> Completed With Errors 3006 files retrieved Elapsed time: 00:04:51</li><li><b>Beta Custodian202</b> <i>Relativity Test Outlook</i> Completed 116 emails retrieved Elapsed time: 00:00:03</li></ul> <b>bco Custodian 201</b> <ul style="list-style-type: none"><li><b>Beta Custodian201</b> <i>Relativity Test Outlook</i> Completed 1010 emails retrieved Elapsed time: 00:00:16</li><li><b>Beta Custodian201</b> <i>Relativity Test OneDrive</i> Completed 2855 files retrieved Elapsed time: 00:04:10</li></ul>

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# 11 Glossary

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## A

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### **Admin**

An Admin is a Relativity system administrator.

### **Agent**

An Agent is a process manager or worker that runs in the background of Relativity to complete jobs initiated by user actions.

### **Analytics**

Analytics is a conceptual search engine that indexes files based on co-occurrences of words and recognizes concepts among documents; Analytics is supported by the mathematically-based latent semantic indexing (LSI) technology.

### **Analytics Categorization Set**

An Analytics Categorization Set is a group of parameters used for gathering example documents that Analytics uses as the basis for identifying and grouping other conceptually-similar documents.

### **Analytics Index**

An Analytics Index is an index that organizes and assess the semantic content of large, diverse and/or unknown sets of documents by searching for keywords and concepts and finding related documents based on words, phrases, or entire documents.

### **Analytics Profile**

An Analytics Profile is a group of parameters used for specifying an Analytics Index's dimensions, concept stop words, dtSearch noise words, and filter configurations.

### **API**

An API, or application programming interface, is a source code-based specification intended to be used as an interface by software components to communicate with each other; Relativity maintains an Import API and Services API.

### **Append**

Append, as found in Append Only or Append/Overlay, is an option in the Overwrite setting on the Relativity Desktop Client that allows an admin to import only files whose control numbers do not already exist in the target workspace.

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## Application

An Application is a customizable collection of Relativity objects that provides improved case and matter management.

## Application Deployment System

The Application Deployment System (ADS) is a Relativity component used to develop and implement custom solutions for improved case and matter management that allows an admin to create, install, and delete applications directly in the web interface.

## Application Library

An Application Library is a repository from which an admin can select Relativity applications to import into a workspace through the web interface.

## Assemblies

Assemblies, also known as event handlers and syncs, are DLL files containing compiled source code used to apply special rules to coding forms.

## Assisted Review

Assisted Review is an application that uses Analytics categorization to teach Relativity how to determine whether a document is responsive or non-responsive, as well as what issues apply to that document so that the system can then determine how the rest of the documents in the data set should be coded.

## Associative Object

An Associative Object is an object type that an admin can link to another object type through a single- or multiple-object field on the original object; the relationship can be one-to-many or many-to-many.

## Audit

An audit is a recorded action listed in the History tab and through the View Audit button on individual objects.

## B

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## Bandwidth Tester

The Bandwidth Tester is the tool inside Relativity's core reviewer interface used to test the capacity of a network connection.

## Batch

A Batch is a group of documents assembled based on criteria that an admin sets and then assigns to a reviewer for review.

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## **Bates number**

A Bates number is an incremental number that occurs on every page of every document of a production set, as specified by an admin in the Begin Bates and End Bates fields on the Production Set layout.

## **Branding**

Branding is the application of redactions, headers, footers, and other modifications to a document in a production.

---

## **C**

### **Case Dynamics**

Case Dynamics is an application that allows an admin to organize and analyze case details such as facts, issues, organizations, people, interview questions and documents, which then helps identify strengths and weaknesses in litigation strategy, and leads to better preparation for depositions, interviews, and trial.

### **CaseMap**

A CaseMap is a database solution for law firms practicing complex litigation that connects facts and objects; the Send to CaseMap feature in Relativity allows an admin to bulk-send items from a workspace to this solution through a wizard.

### **Categorization**

Categorization is a process of Relativity Analytics in which an admin can gather large groups of documents based on a few examples that represent a single concept and centralize those documents in a Categorization Set.

### **Child object**

A child object is an object that lives under, and inherits permissions from, a parent object.

### **Choice**

A Choice is a value applied to a single or multi-choice list field that is used in coding fields to allow reviewers to record decisions on a document.

### **Client**

A Client is an object type associated with the User and Matter object types.

### **Clustering**

Clustering is the process of using a Relativity Analytics index to identify conceptual groups within an entire workspace or sub-set of data.

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## Command Line

A Command Line is an interface or dialog between the user and a program, or between two programs, where a line of text (a command line) is passed between the two; an admin can use the Windows Command Line to import documents into Relativity, which allows for automation of document importing along with other parts of processing and integration.

## Compare

Compare is a system field (Relativity Compare) that compares the extracted text of two specified documents.

## Concept searching

Concept searching is the logic that drives Relativity Analytics by allowing a user to find information without a precisely phrased query but instead by applying a block of text against the database to find documents of similar conceptual content.

## Content Analyst

The technology that allows for all Relativity Analytics functionality, including index building and population, structured analytics, and Relativity Assisted Review.

## Conversation Index

Conversation Index is an indentation method for a view with a visualization type of Indented List in Relativity that allows an admin to display conversation threads in a document view; also pertaining to Conversation Index Parsing, which is a transform handler that parses the Microsoft Exchange field Conversation Index to use the related items functionality in Relativity.

## Core Reviewer Interface

The Core Reviewer Interface is the area in Relativity containing the viewer, Related Items pane, persistent highlight sets tree, and layouts in which the reviewer codes documents and applies redactions and markups.

## Customer Lockbox

A feature which prevents System Admins from accessing a customer workspace unless explicitly granted. See the Customer Lockbox section in Workspace security for more information.

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## D

### Deduplication

Deduplication is a setting in the Processing object that, when enabled, removes duplicate files from the processing set data on either a global or custodial basis, depending on an admin's selection.

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## DeNIST

DeNIST is a setting in the Processing object that, when enabled, separates and removes files found on the National Institute of Standards and Technology (NIST) list from the data an admin plans to process so that those files don't make it into Relativity when the admin publishes a processing set.

## Dependencies

Dependencies are the child and associative object relationships that an admin must delete when attempting to remove an object that has children and/or associative objects through the Delete Object Dependencies function.

## Discover Files

Discover Files is the phase of processing in which an admin can retrieve deeper levels of metadata not accessible during the previous phase (Inventory) and prepare that metadata for publishing to a workspace.

## Document

A Document is a record within a workspace and an available Object Type for an admin creating a View.

## Domain Parsing

Domain Parsing is a transform handler that extracts email domains from email addresses in a document.

## dtSearch

dtSearch is a search index option that allows a user to perform proximity searches, stemming, and other advanced keyword searching options.

## E

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### Email threading

Email threading is an option for displaying email chains with indentation in a view in Relativity.

### Entity

An Entity is an object that functions as the central location for people, companies, organizational groups, and their metadata. Relativity Legal Hold, Processing, and Analytics all leverage the Entity object.

### Errors

Errors is a tab available from Home that lists all errors that have occurred throughout the Relativity environment.

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## Event Handler

An Event Handler is an assembly that helps facilitate the completion of document review and various other functions in Relativity by applying custom business logic to corresponding user actions.

## Extracted Text

Extracted Text is document metadata removed during file processing and placed in a separate file, which is then loaded into Relativity as part of a larger load file and contained in the Extracted Text field.

---

## F

### F1

F1 is a measure of the harmonic mean, or the weighted average of precision and recall, that Relativity Assisted Review uses to gauge the accuracy of its results and includes in several reports.

### Favorites

Favorites is a feature on the greetings menu in which a user can bookmark their most visited areas of Relativity so that they can easily navigate to those areas after logging in, thus limiting the number of required clicks.

### Field

A Field is used to store Document metadata and coding values within Relativity.

### File Repository

A File Repository is a Relativity-accessible data structure stored on a server that contains files and directories associated with a workspace.

### Filtering

Filtering is a way to search for a specific single item or group of items within a list in Relativity.

### Finalization set

A Finalization set is a snapshot of a project Universe at a given time where the categorization values for documents in the universe are preserved from further changes by being copied to a separate database field. During Finalization the categorization values are prepended with a Finalization Set prefix to indicate their distinction from other Finalization Sets which may be created.

### Folder

A Folder is a container of documents in Relativity that are arranged in a hierarchy in the folder browser.

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## G

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### **Group**

A Group is a basic Relativity object with which one or more users is associated and in which an admin determines those users' permissions on a workspace-by-workspace basis.

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## H

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### **Handler**

A Handler is a set of rules used by a transform set to identify relevant content in a field.

### **History**

History is a tab containing audit records that track the actions performed by admins and reviewers throughout the workspace.

### **HTML alert**

An HTML alert is a custom message that appears when a reviewer opens a document in the core reviewer interface.

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## I

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### **Imaging**

Imaging is the process of converting a group of documents to images in Relativity using imaging profiles and sets.

### **Import API**

The Import API is an extensibility tool used to import processed data such as documents and metadata into Relativity without the need for the Relativity Desktop Client or a load file.

### **Indented List**

An Indented List is an option for displaying levels within an email relationship, such as a in a conversation thread, which allows for easier understanding of the order of information in the family.

### **Inline Tagging**

Inline tagging is a feature that allows a reviewer to tag sections of text within a transcript that are then available to reference through hyperlinks.

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## Instance setting table

The instance setting table is a database table that contains settings and defaults values that correspond to functions inside Relativity.

## Invariant

Invariant is the engine that performs file inventory, discover, and publish on processing sets, as well as imaging jobs.

## Inventory Files

Inventory Files is the phase of processing in which an admin can eliminate irrelevant raw data from the discover process through a variety of preliminary filters that exclude certain file types, file locations, file sizes, NIST files, date ranges, and sender domains.

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## K

### Keyboard Shortcuts

Keyboard Shortcuts are combinations of two or more keys that, when pressed, perform a task that would typically require a mouse.

### Keyword expansion

Keyword expansion is a searching method within Analytics for finding how different language is used to express identical or conceptually similar concepts and terms in an index.

---

## L

### Latency

Latency is the total time for a network packet to travel from the application on one server, through the network adapter, over the wire, through the second adapter, and into an application on another server; an admin can execute a latency test in Relativity through the bandwidth tester.

### Layout

A Layout is a web-based coding forms that gives reviewers access to view and edit document fields and complete specific review tasks.

### License Key

A License Key is a string of characters used to install a product, as found in the Apply License Key option in the License Console in Relativity.



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## List Properties

List Properties are a heading on the field form that allows an admin to control how an item displays in a view.

## Lists

Lists are an option in Relativity for saving a group of items without having to specify the types of conditions required for a saved search, which means they remain constant unless someone replaces them with an existing list.

## Load Balancing

Load Balancing is the process of distributing a workload across multiple web servers, as found in the Enable User Load Balancing setting in the Servers tab in Relativity.

## Load File

A Load file is the file used to import data into a workspace through the Relativity Desktop Client.

## M

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## Markup

Markups are highlights and redactions a reviewer adds to documents in the Relativity image viewer.

## Markup Set

A Markup Set is a securable sets of annotations and redactions available to reviewers for applying text redactions to documents in the viewer.

## Mass Operations

Mass Operations are single actions performed on multiple documents or objects at the same time, such as mass edit, move delete, produce, replace, image, print image, send to CaseMap export file, cluster, save as list, and process transcripts.

## Matter

Matters are basic Relativity objects associated with one or more workspaces, to which Clients are then associated (mirroring the billing structure of most law firms); matters are used to define different cases, disputes, or consulting instances that a firm may encounter with a client.

## MotD

MotD is the message of the day displayed to all users when they log in to Relativity.

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## Move (Mass Operation)

Move is a mass operation that allows an admin to move multiple documents to a new folder with one action.

## N

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### Native File

A Native File is a file format native to a program that other programs may not recognize. Native File pertains to the Native File Behavior setting on the Relativity Desktop Client, which an admin can use to import a load file into a workspace.

### Native Type

A Native Type is a Relativity-supported file type that an admin can import and image; Native Type pertains to the Native Types tab and list, which an admin references when selecting file types to restrict from imaging.

### Nested

Nested is a term used when referencing Relativity tabs that appear under a parent tab.

### Network Connection

A Network Connection is an association that a network layer establishes between two users so they can transfer data.

## O

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### Object

An Object is a workspace item that stores information and can connect to other workspace objects.

### Object-Level Permissions

Object-Level Permissions are per group security rights to view, edit, delete, add, and edit security for Relativity objects such as fields, tabs, workspaces, and layouts. Security rights work jointly with tab visibility or browser permission.

### OCR

OCR is an industry acronym for Optical Character Recognition, a Relativity feature that uses pattern recognition to identify individual text characters on a page—such as letters, numbers, punctuation marks, spaces, and ends of lines—and translates text in images, such as scanned and redacted documents, into actual text characters.

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## Overlay

An Overlay is a setting in the Relativity Desktop Client that replaces existing documents in Relativity with new import files whose control numbers already exist in the target workspace.

## Override Production Restrictions

Override Production Restrictions is a permission that allows an admin to override the setting in the production restrictions option on the workspace details page and produce documents that contain conflicts defined by these restrictions.

## Overturn

An Overturn is a document that was coded one way in one finished round and then coded another way in a subsequent finished round.

## Overwrite

Overwrite is a setting in the Relativity Desktop Client that erases existing documents in Relativity and replaces them with new import files.

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## P

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## Persistent Highlight Set

A Persistent Highlight Set is a reusable, transferable set of persistent highlight specifications a reviewer can select in the Viewer to assist in document review.

## Picker

A Picker is a pop-up dialog that allows an admin to select objects and values when creating fields, filtering, setting up saved searches, and setting other configurations in a Relativity workspace.

## Pivot

A Pivot is a Relativity feature an admin can use to quickly analyze case data to identify trends and patterns in a case by summarizing data in tables and charts to simplify analysis.

## Process Transcripts

Process Transcripts is a mass operation that reads an ASCII text file, identifies page breaks, and parses out the transcript content into a hyperlinked word index for fast searching.

## Processing

Processing is a Relativity feature that allows an admin to ingest raw data directly into a workspace for eventual search and review without the need for an external tool.

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## **Procuro**

A utility used to upgrade the schema for the master (EDDS) database.

## **Produce**

Produce is a Processing term used when preparing documents, electronically stored data, and other tangible items for submission to a party during the discovery phase of litigation.

## **Production Set**

A Production Set is a saved set of parameters that Relativity uses when running a production. A Production set includes a markup set for redactions, document numbering, image placeholder, branding, and other settings.

## **Propagation**

Propagation is a setting that automatically forces a coding value to a specified group of related items such as duplicates, family, similar documents, etc. during document review.

## **Publish Files**

Publish Files is the final stage of processing, in which an admin can load processed data into the environment so reviewers can access the files.

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## **Q**

## **Queue**

A Queue is an area of Relativity that stores jobs that have already been created and are in some stage of being completed, whether their status is pending, waiting, processing, stopped due to error, or completed.

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## **R**

## **RDC**

RDC is the Relativity Desktop Client, which an admin uses to import a document load, image, and production files to Relativity and to export production sets, saved searches, and folders, as well as to both import and export custom Relativity applications and object information.

## **Redirection Attempts**

Redirection Attempts is the number of times a user is unable to redirect to the URL provided.

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## Redistributable

Redistributables are software packages that can be redistributed by a third party as part of its own software. For example, Microsoft Visual C++ 2010 Redistributable, which is required to operate certain versions of Relativity.

## Related Items

Related Items are documents deemed relational based on their similar content and grouped together into duplicates and email families. Related Items are accessible via the related items pane in the core reviewer interface.

## Relativity Binders

Relativity Binders is an iPad application that allows users to securely view evidence and prepare narratives on their iPads. With this app, users can view, annotate, and organize documents from Relativity. The app synchronizes and saves the user's annotation information in Relativity.

## Relativity Binders Admin

Relativity Binders Admin is an application that allows users to generate PDFs from a set of documents in Relativity and then provide those PDFs as a "binder" for Relativity Binders iPad app users.

## Relativity Data Grid

An alternate less expensive and easily scalable NoSQL repository for extracted text and audit records.

## Relativity Dynamic Object

A Relativity Dynamic Object is an object that an admin can customize and link to documents and to each other to create powerful custom applications.

## Repeated Content Filter

A Repeated Content Filter is an object under the Analytics tab that removes text that doesn't contribute to the conceptual content of a document, such as confidentiality footers or standard boilerplates, which then prevents the Analytics engine from discovering unwanted term correlations.

## Replace (mass operation)

Replace is a mass operation that allows an admin to replace existing field text with new content.

## Resource Files

Resource Files is a Relativity feature in which an admin can upload files or assemblies with custom code for use in applications and provide custom functionality for a Dynamic Object or other features.

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## Resource Pool

Resource Pool is a set of servers (agent and SQL) and file repositories associated with a workspace based on litigation matter, location, or other categories.

## Review Manager

Review Manager is an application that allows admins to generate forecasts, insights, and optimizations to help track the time and cost of review and provides graphical reports of key review metrics help streamline workflow and implement best practices.

## Round

A Round is a set of documents that are categorized by Assisted Review and checked by a reviewer for accuracy.

---

## S

### Sample set

A Sample set is the group of documents produced by Assisted Review to be submitted to reviewers as a means of training the system. A Sample Set is randomly created by Assisted Review. The number of documents in the Sample Set is determined by the overall size of the Data Set, in conjunction with one of the following sampling types: statistical sampling, percentage sampling, or fixed sample size.

### Saved Search

A Saved Search is a saved set of admin-defined criteria with custom queries and unique views used to return the latest documents that meet the defined criteria.

### Script

A Script is a SQL-based command that admins can use to customize and augment Relativity functionality. Scripts are deployed with Relativity and reside in the Relativity script library.

### Search Index

A Search Index is an admin-defined set of specifications to facilitate a search across content and isolate individual terms within individual documents.

### Search Terms Report

A Search Terms Report is a Relativity feature that allows an admin to enter a list of terms or phrases and generate a report listing those words' frequencies in a set of documents.

### Servers

Servers is a tab available from Home in which an admin can add new resource servers, including Analytics and processing servers, to the environment and view a list of

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the various servers currently in use in the environment.

### **Services API**

Services API is a set of web services used to programmatically create, read, update, delete, and query some of the most commonly used Relativity object/artifact types.

### **Similar document detection**

Similar document detection is a feature within Analytics that identifies groups of highly related documents based on conceptual similarity and displays them as related items in Relativity.

### **Skip**

Skip is a feature that accelerates document review by advancing a reviewer to the next document in the queue that meets the condition of the view when propagation is enabled.

### **SQL Server**

SQL Server is a relational database management system and relates to the SQL Server setting on the resource pool layout, to which an admin can add the name of an SQL Server available on the network.

### **Structured Data Analytics**

Structured Data Analytics is an operation within Analytics that analyzes text to identify the similarities and differences between the documents in a set so that users can quickly assess and organize a large, unfamiliar set of documents. Using Structured Data Analytics can shorten review time, improve coding consistency, optimize batch set creation, and improve Analytics indexes.

### **Summary Report**

A Summary Report is an aggregate tally of field values that an admin can run from the Summary Reports tab.

### **System admin**

A system admin is a Relativity admin with rights to view every item within a Relativity environment, including access to all admin tabs from Home, which allows an admin to create and edit new clients, matters, users, groups, and views, among other features.

### **System Objects**

System Objects are system components such as fields, views, layouts, and groups that are intrinsic to Relativity and can't be modified or removed.

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## T

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### **Tab**

A Tab is an interface component that gives the admin or reviewer access to an assortment of Relativity functionality.

### **Tally/Sum/Average**

Tally/Sum/Average is a mass operation to tally, sum, or average the values of fixed-length text, choice, user, and number field types associated with documents and objects. This feature is used to determine the number of pages in a print job or production.

### **Textual near duplicate**

Textual near duplicate is an option within Structured Data Analytics that identifies records in which most of the text appears in other records in the group and in the same order. This option returns a percentage value indicating the level of similarity between documents.

### **Transcript**

A Transcript is a document version of an attorneys' dictation made during litigation.

### **Transform Set**

A Transform Set is a Relativity feature that uses handlers to analyze and extract the contents of one field and copy them to another.

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## U

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### **Universe**

The overall collection of data that has been ingested into Assisted Review for the purposes of document categorization.

### **URL**

A URL, or Uniform Resource Locator, is a web address that pertains to a field on the servers layout, the Webservice URL field on the Relativity Desktop Client, the Download Handler URL field on the workspace layout, and the Relativity Analytics Server field on the Analytics Index.

### **User**

A User is an individual with access to the Relativity environment.



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## Utilities

Utilities are settings in Relativity that allow an admin to manage system keyboard shortcuts, download the Relativity Desktop Client and the viewer installation kit, and view users' personal items.

## V

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### View

A View is a customizable list of items in Relativity from which a user can sort and filter to locate specific items.

### Viewer

The Viewer is the area of the core reviewer interface in which document review takes place. It displays loaded forms of documents from the workspace and provides options for controlling the mode in which those documents display. Reviewers can apply markups, redactions, and persistent highlights to documents in the viewer.

## W

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### Web API

A Web API is a defined set of HTTP request messages along with a definition of the structure of response messages; Web API pertains to one type of server displayed on the Servers tab and available to associate with a resource pool.

### Web Server

A Web Server is a server that delivers content to Relativity to make it accessible through the Internet; Web server pertains to the servers displayed on the Servers tab that are available to associate with a resource pool.

### workers

Workers are the machines a worker manager server uses to complete imaging, document conversion, and processing jobs.

### Workspace

A Workspace is a securable document repository used to facilitate productions, witness testimony, and other documents in which admins and reviewers conduct searches for relevant material and set up Views to organize that material.

### workspaces

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## **Workstation**

Workstation is a general term for the platform that hosts the software, hardware and utilities required to operate Relativity.

## **X**

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## **XML**

XML is a markup language that defines a set of rules for encoding documents in a format readable by both humans and machines.