

Relativity Collect - X1

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1 Collect

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

Note: This document covers the X1 source.

- **X1 Files** - collect documents from within the X1 file system. You can inspect file names and other metadata, as well as collect files for this data source.
- **X1 Emails** - collect emails and attachments from within a custodian's email that is a part of the X1 system. You can configure collection parameters and specify a date range for email messages that you want to discover.

The screenshot displays the configuration interface for the Collect application. It is divided into two main sections: 'Collection Details' and 'Data Source Types'.

Collection Details:

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

Data Source Types:

Please select at least one data source *

- X1 Emails**: A button with a green checkmark and the X1 logo.
- X1 Files**: A button with a green checkmark and the X1 logo.

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 the data source.

2.1 System requirements for Collect

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

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

2.2 Installing Collect

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

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

Because 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](#).


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.

2.2.1 Installing Collect from the Application Library to a workspace

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

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

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

1. Navigate to the workspace where you want to install the application.
2. Navigate to the **Application Admin** tab.
3. Click **New Relativity Application** to display an application form.
4. Click the **Select from Application Library** radio button in the Application Type section.
5. Click  in the **Choose from Application Library** field.
6. Select 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"> ■ Collection – View, Edit, Add ■ Collection Detail Custodian – View, Edit, Add ■ Collection Detail Custodian Target – View, Edit, Add ■ Collection Detail Custodian Target Result – View, Edit, Add ■ Collection Detail Request – View, Edit, Add ■ Collection Detail Source Instance – View, Edit, Add ■ Collection Detail Source Type – View, Edit, Add ■ Collection Detail Summary – View, Edit, Add ■ Collection Matter – View, Edit, Add ■ Collection Source Instance – View, Edit, Add ■ Collection Source Instance Parameter – View, Edit, Add ■ Collection Source Type – View, Edit, Add ■ Collection Source Type Parameter Type – View, Edit, Add ■ Collection Source Type Criteria – View, Edit, Add ■ Custodian Target – View, Edit, Add ■ Entity – View, Edit, Add ■ Custom – View, Edit, Add 	<ul style="list-style-type: none"> ■ Entities ■ Collect <ul style="list-style-type: none"> ○ Matters ○ Custodian Targets ○ Collections ○ Status Summary ○ Target Status ○ Collection Admin ○ Monitor 	<ul style="list-style-type: none"> ■ None

3 Matters

In Collect, a matter represents a legal action or case requiring you to collect electronic data from sources such as X1. Matters can be used to group multiple related collection jobs.

3.1 Matters

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

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

3.1.1 Creating a matter

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

1. Navigate to the Matters tab. Collect displays a list of the active matters currently available to this application.
2. Click **New Matter**.
3. Complete the fields in the Matter Details layout. See [Matter Details layout fields below](#).
4. Click **Save**. Collect displays the matter details. See [Viewing or editing matter details on the next page](#).

You can also create a matter when you add a new collection. Click the **Add** link on the collection layout. See [Creating a collection on page 19](#).

3.1.2 Matter Details layout fields

The Matter Details layout contains the following fields:

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

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

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

Matter Details

Matter Details

Name *

Number

Status Manage

Primary Contact

Description Edit

3.1.3 Viewing or editing matter details

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

The details page includes the following sections:

- **Matters Details** - lists the name, number, status, primary contact and description of the matter.
- **Collect** - lists all collections associated with the matter. You can also perform the following tasks in this section:
 - **Associate the matter with a new collection** - to create a new collection, click **New**. See [Creating a collection on page 19](#).
 - **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 X1 email endpoint 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 X1. When the custodian and the data source unites in Collect, Collect then connects to the specific custodian in the data source.

Note: Custodian targets can be automatically built for X1 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.

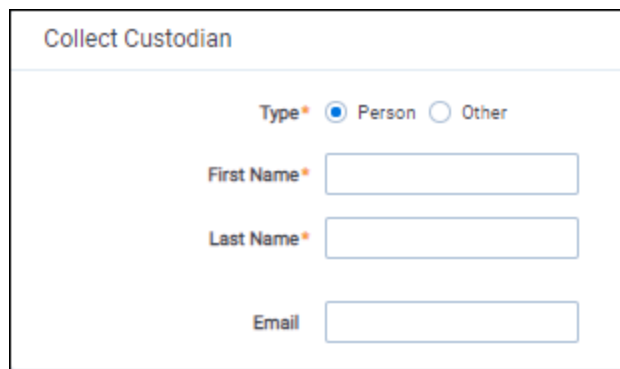
4.1 Custodians

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 15](#).
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***: A text input field.
- Entity***: A dropdown menu with a "Select" button and an "Add" button.
- Data Source***: A dropdown menu.
- Target***: A text input field.

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 24](#).

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 26](#). 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 28](#).
- **Error** - the collection did not run successfully and couldn't collect from the target.

5 Creating a collection data source

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

5.1 Creating a collect data source

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

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


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:
 - **X1 Emails** - select to collect data from a custodian's emails stored in an X1 endpoint. For more information, see [X1 Emails on page 15](#).
 - **X1 Files** - select to collect data from a custodian's files stored in an X1 endpoint. For more information, see [X1 Files on page 17](#).

Data Source Information ?

Name*

Type* 
X1 Emails

Settings

X1 Enterprise Manager*
Endpoint Url

X1 Enterprise Manager*
Endpoint Port

X1 Downloader API*
Endpoint Url

X1 Downloader API*
Endpoint Port

Client Id*

Client Secret*

Project Id*

Project Path*

Target External Id*

Certificate Thumbprint*

4. Enter the following information in Settings:

X1 Settings

- **X1 Enterprise Manager Endpoint URL** - enter the endpoint URL for the X1 Manager Service. An example of a URL is <https://mapleproject.x1dev.com:8443/>. For more information, see X1 documentation.

- **X1 Enterprise Manager Endpoint Port** - enter the port number used for Manager Service traffic.
- **X1 Downloader API Endpoint URL** - enter the endpoint URL for the X1 Downloader Service. An example of a URL is <https://mapleproject.x1dev.com:8443/>.
- **X1 Download API Endpoint Port** - enter the port number used for Downloader Service traffic.
- **Client ID** - enter the X1 Client ID found on the API Clients page in X1. For more information, see X1 documentation.
- **Client Secret** - enter the X1 secret OAuth token copied from the X1 user interface. For more information, see X1 documentation.
- **Project ID** - enter the Project ID found in the X1 user interface to automate X1E with a third party client via the API. For more information, see X1 documentation.
- **Project Path** - enter the Global Project Collection path found in the X1 user interface. For more information, see X1 documentation.
- **Target External ID** - enter the specific identifier of the email locations. Note that only the specified location will be searched.
- **Certificate Thumbprint** - enter the secured thumbprint that validates a self-signed SSL certificate. Locate the thumbprint in X1. For more information on locating the Certificate Thumbprint, see X1 documentation.

5. Click **Save**.

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

5.1.1 Data source types and properties

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

5.1.1.1 X1 Emails

The following table lists the filter criteria supported for X1 Emails collections.

Note: Relativity needs to be registered in X1 before using this data source. For information on registering Relativity in X1, see X1 documentation.

Filter criteria

Property	Description	Example
Attachment Name	When you use the Attachment Name, the search returns all attachments that contain the text in the name of the attachment file.	If you search for "quarterly financial records," your search results will include the searched phrase from all attachments in X1 email data sources.

Property	Description	Example
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.
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 Body	When you use the Email Body property in a query, the search returns all messages email message contains the text you’re searching for. For more information, see Criteria on page 22 .	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
Folder 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.
Free Form Search	Searches across all data sources simultaneously with general searching options. For more information on X1 searching, see Basic Search Commands and Advanced Search Command .	If you search for "quarterly financial records," your search results will include the searched phrase from all X1 email data sources.
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.
Has Attachments	When you use the Has Attachments property, the search returns emails with or without attachments based on the Value setting.	If you mark toggle the Value setting On, your results include all messages that include an attach-

Property	Description	Example
		ment.
Indexing Status	When you use the Indexing Status property in the query, the search returns all files that contains, equals, or does not equal one of the listed indexing statuses. The list of statuses are Starting, Indexing, Finished, Paused, Queued, Error, Cancelled. For more information on Indexing Statuses, see X1 documentation .	If you search Does Not Equal "Error," your search results will include all files without the Error index status.
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.
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.
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 which 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"
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.

5.1.1.2 X1 Files

The following table lists the filter criteria supported for X1 Files collections.

Note: Relativity needs to be registered in X1 before using this data source. For information on registering Relativity in X1, see X1 documentation.

Filter criteria

Property	Description	Example
Date Created	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.
Date Modified	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.
Document Type	When you use the Document Type property in a query, the search returns all documents that contain, equal, or does not equal what is entered.	If you search "spreadsheet," your results include Excel files.
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.
Free Form Search	Searches across all data sources simultaneously with general searching options. For more information on X1 searching, see Basic Search Commands and Advanced Search Command .	If you search for "quarterly financial records," your search results will include the searched phrase from all X1 file data sources.
Indexing Status	When you use the Indexing Status property in the query, the search returns all files that contains, equals, or does not equal one of the listed indexing statuses. The list of statuses are Starting, Indexing, Finished, Paused, Queued, Error, Cancelled. For more information on Indexing Statuses, see X1 documentation .	If you search Does Not Equal "Error," your search results will include all files without the Error index status.
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.
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.

6 Collect tab

Before you begin collecting, you must create a collection job and associate it with a specific matter, custodians, and one or more data sources. Add the custodians, data sources, and other information using the Collect wizard. Once completed, start the collection using the Collect Console. Finally, download a results report that details the items collected and a summary report of the entire collection job. For more information, see [Reports on page 27](#).

6.1 Creating a collection

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

Use the following procedure to create a collection:

1. On the Collect tab, click the **Collections** sub-tab. Collect displays a list of the collections currently added to this application.
2. Click **New Collection**.
3. Complete the steps in the Collect wizard. See [Using the Collect wizard below](#)
4. On the Collection Details page, click **Run Collection** in the console. See [Collection Summary on page 24](#).

6.1.1 Using the Collect wizard

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

Collection wizard security permissions

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

- **Custodian - View**

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

6.1.1.1 Collection Details

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

- **Name** - the name of the collection.
- **Collection Matter** - the name of the matter associated with this collection. Click **Edit** to select an existing matter or click **Add** to define a new one. See [Creating a matter on page 8](#).
- **Processing Source Location** - the file repository for collected data to be stored for future processing of documents or for storing collected data. See [Processing](#) and [Collect Store on page 30](#).
- **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 25](#).

- **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 15](#).

(Click to expand)

Collection Details

Name *

Job Number

Collection Matter *

Processing Source Location *

Description

Zip Collected Files

Receive Progress Notifications

Zip Password Show Password

Notification Address

Data Source Types

Please select at least one data source *

X1
X1 Emails



X1
X1 Files

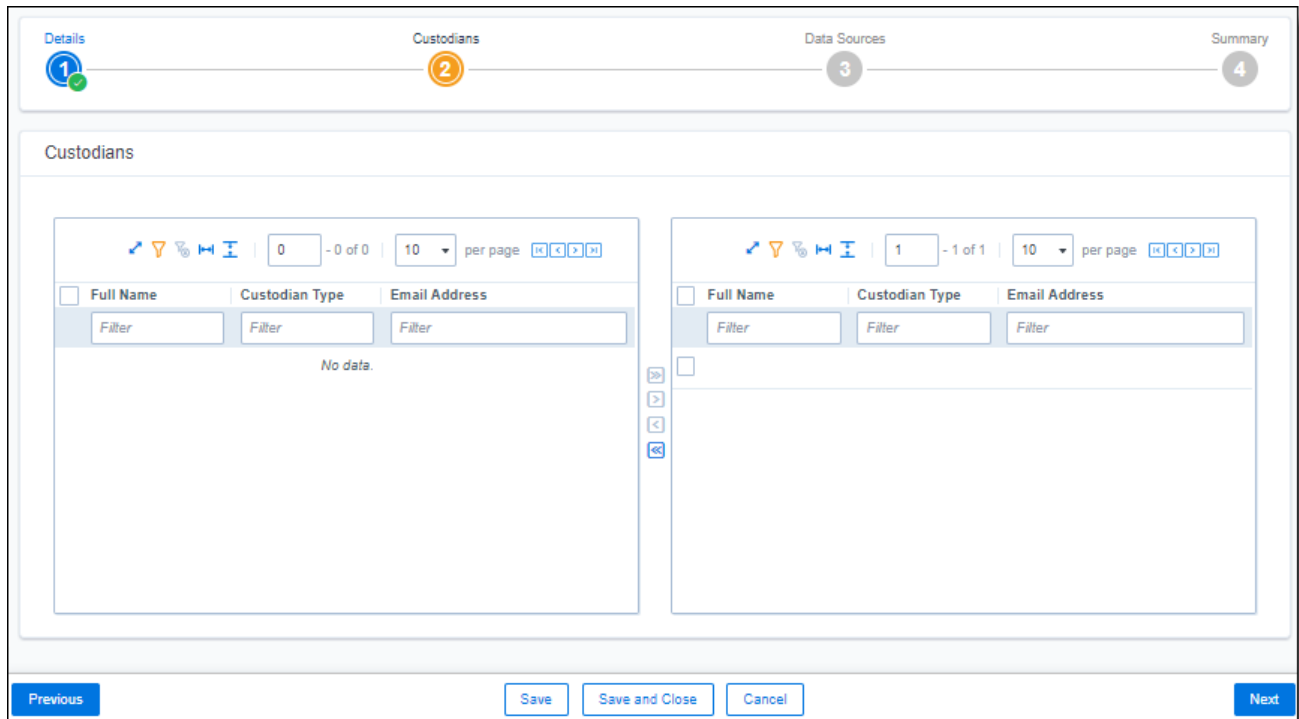
6.1.1.2 Custodians

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

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

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

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



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

6.1.1.3 Configure Data Source

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

Data source criteria

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

- **Select and unselected tabs** - choose the data sources to collect from by moving unselected data sources to the selected list.

- **Field** - choose the field to filter on within the data source.

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

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

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.

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.

X1 Email operators

Setting criteria for X1 emails is not required.

Criteria Field	Operators
Attachment Name	Contains, Does Not Equal, Equals
BCC	Contains, Does Not Equal, Equals
CC	Contains, Does Not Equal, Equals
Email Body	Contains
Folder Path	Contains, Does Not Equal, Equals
Free Form Search	Equals
From	Contains, Does Not Equal, Equals
Has Attachments	Equals
Indexing Status	Contains, Does Not Equal, Equals
Received Date	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Sent Date	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Subject	Contains, Does Not Equal, Equals
To	Contains, Does Not Equal, Equals

X1 File operators

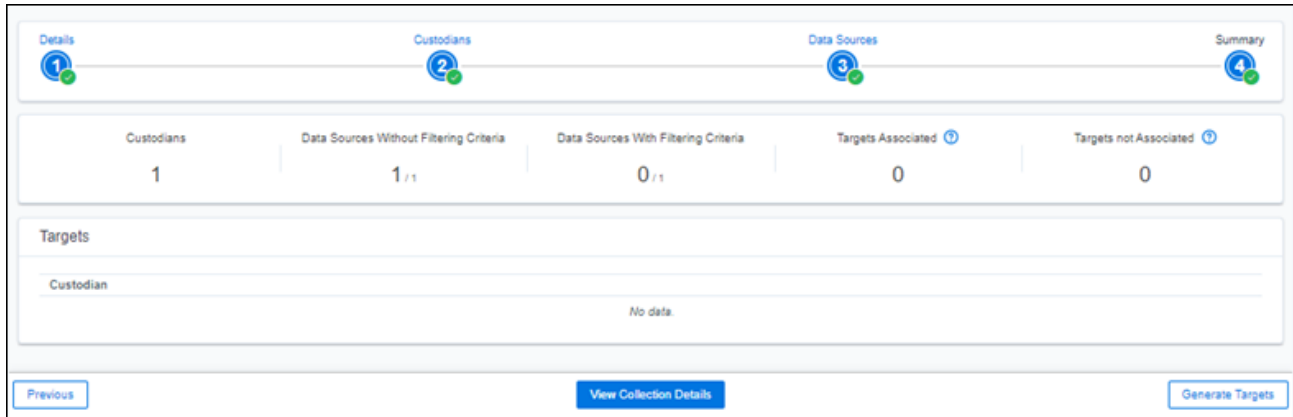
Setting criteria for X1 files is not required.

Criteria Field	Operators
Date Created	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Date Modified	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals
Document Type	Contains, Does Not Equal, Equals
Extension	Contains, Does Not Equal, Equals
Free Form Search	Equals
Indexing Status	Contains, Does Not Equal, Equals
Name	Contains, Does Not Equal, Equals
Path	Contains, Does Not Equal, Equals

6.1.1.4 Collection Summary

Complete the creation of the collection by reviewing all steps, custodians, data sources, and targets, before finalizing. If X1custodian targets weren't created before started the project, click **Generate Targets**. Clicking Generate Targets will check to see if targets exist for the custodians you've selected for collection. If the targets do not exist, Collect will automatically create them based on the email address contained in the Entity record for each custodian.

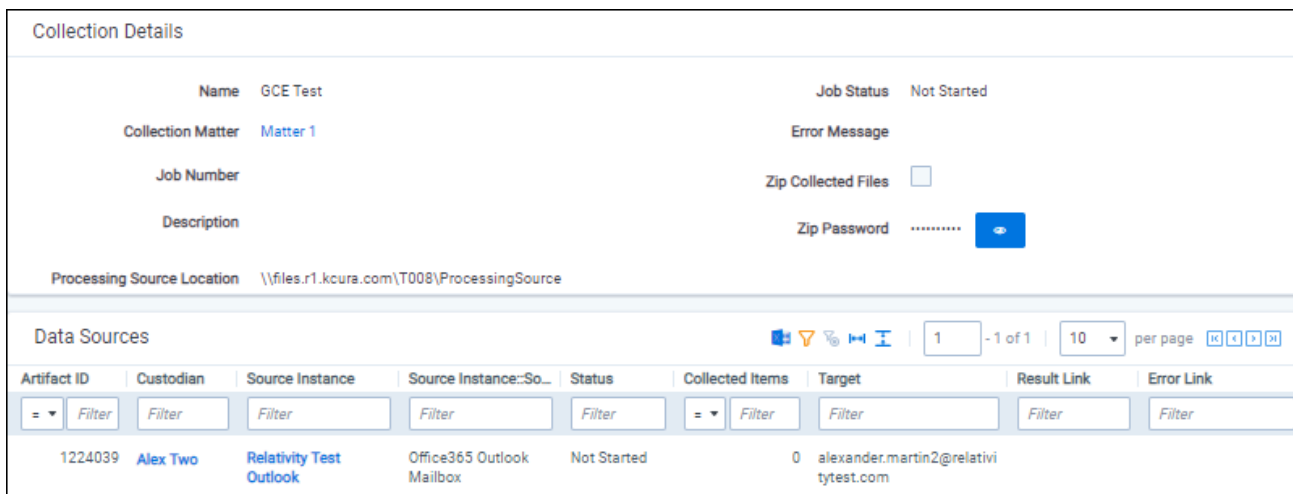
Complete the collection setup by clicking **View Collection Details**. Once you finish creating the collection, it redirects you to the Collection Details page. From the Collection Details page, you can run the collection from the [Collection Summary above](#). For more information, see Collection Console.



6.2 Viewing or editing collection details

You can display the collection details by clicking the name of a collection on the Collections tab. Collection also displays these details immediately after you add a new collection. On the Collection Details page, the buttons at the top of the page to edit, delete, or perform other collection tasks. Editing a collection takes you to the first step in the wizard. For more information, see [Using the Collect wizard on page 19](#).

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



- **Collection Details** - lists the information that you entered or selected when you created the collection:
 - **Name** - the name given to the collection.
 - **Collection Matter** - the matter used in the collection.
 - **Job Number** - a number assigned to the job for reporting purposes.
 - **Description** - a description of the collection used for reporting purposes.
 - **Job Status** - the status of the collection (New, Not Started, Started, Completed, Error, Completed with Errors)
- **Collection Console** - displays buttons that you can use to perform the following tasks. See [Collect console on the next page](#).
- **Data Sources** - lists all the collection activities associated with this collection.
 - **Custodian** - the custodian associated with the collection.
 - **Data Sources Name** - the name of the data source associated with the collection.
 - **Data Source Target** - the name of the target associated with the collection.
 - **Status** - displays one of the following statuses:
 - **Not Started** - the collection has not been started.
 - **Started** - the collection is in progress.
 - **Completed** - the collection is done.
 - **Completed with Errors** - the collection of the target completed and one or more targets had errors. For more information, see the [Errors report on page 28](#).
 - **Error** - the collection failed. For more information, see [Collect reports on page 28](#).
 - **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 19](#).
 - **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 19](#).

6.2.1 Storing collected data

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

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

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

6.2.2 Viewing collected data

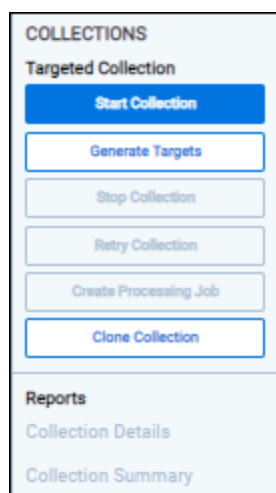
When Relativity collects the data, Relativity accepts the path names and file names that the source provides. On occasion, the collection source modifies the path name or file name.

6.2.2.1 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.

6.3 Collect console

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



6.3.1 Generate Targets

Generate the targets to retrieve all known Collect targets based on the custodians and data sources selected. These data sources include X1.

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

6.3.2 Start Collection

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

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

6.3.3 Stop Collection

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

6.3.4 Retry Collection

The Retry Collection button is only available when a collect job doesn't complete because of errors. Click **Retry Connection** to start another collect job.

6.3.5 Create Processing Job

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

6.3.6 Clone Collection

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

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

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

6.3.7 Reports

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

7 Collect reports

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

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

7.1 Running reports

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

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

7.1.1 Collection Summary report

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

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

7.1.2 Collection Details report

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

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

7.1.3 Results report

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.

7.1.4 Errors report

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

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

7.1.4.1 Errors.csv

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

8 Collect Store

Large volumes of raw collected evidence 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 19](#).

8.1 Moving collected data into storage

When creating a collection job, you have to select a Processing Source Location. The Store option is available in the Processing Source Location drop-down menu within the first step of the Collect Wizard. For more information on the Processing Source Location, see [Using the Collect wizard on page 19](#).

8.2 Exporting collected data

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

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

9 Monitor

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

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

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