

# Relativity Collect

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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.

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**Note:** This document covers the Collection source source.

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- **Bloomberg**—collect short message data from Bloomberg Chat and Email sources. For more information on short messages, see the Relativity User site.
- **Box**—collect data from Box cloud storage sources. You can also collect files from Box directly into RelativityOne Government. This data source requires application setup before you can add it as a data source in Collect. For more information, see [Box application setup on page 21](#).
- **Google Workspace**—collect documents from Chat, Drive, Gmail, and Groups. You can also collect files directly into RelativityOne Government. A license for Vault is required to collect data from Google Workspace. For more information, see Google's Vault Help documentation.. Google Chat is collected as RSMF files. For more information on short messages, see the Relativity User site. This data source requires application setup before you can add it as a data source in Collect. For more information, see [Google Workspace account setup on page 25](#).
- **iManage**—collect document and email data from the iManage application. You can collect files and emails directly into RelativityOne Government from iManage's private cloud, Cloud Classic.
- **Microsoft 365**—collect documents from a custodian's OneDrive account, a custodian's Outlook mailbox, archived mailbox, calendar, and contacts list, a custodian's Team account, and SharePoint sites. You can collect chats from Teams directly into RelativityOne Government. Teams is collect as RSMF files. For more information on short messages, see the Relativity User site. This data source requires application setup before you can add it as a data source in Collect. For more information, see [Microsoft 365 setup](#).

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**Notes:** Depending on your RelativityOne license, your Microsoft tenant might be Microsoft 365 or Microsoft 365 Government. When using Microsoft 365 Government, all fields, workflows, and processes will be the same. The only difference will be the Microsoft 365 source icon you select when setting up a data source or creating a collection.

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- **Refinitiv Eikon**—collect short messages from within your organizations Refinitiv Eikon chats. For more information on short messages, see the Relativity User site.
- **Slack**—collect short messages from within an organization's or custodian's Slack Enterprise application. You can also collect chats from Slack Enterprise Grid directly into RelativityOne Government. For more information on short messages, see the Relativity User site. This data source requires application setup before you can add it as a data source in Collect. For more information, see [Slack data source on page 86](#).
- **X1**—collect documents from within the X1 file system or emails and attachments from within a custodian's email that is a part of the X1 system. You can inspect file names and other metadata, as well as collect files for this data source. You can also configure collection parameters and specify a date range for email messages that you want to discover.



## 2 Installing Collect

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

To install Collect, install Collect from the Application Library tab and, if required, enable access for the data source.

Confirm that you have the appropriate system admin permissions to install an application. For more information, see [Workspace security](#) on the RelativityOne documentation site.

### 2.1 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.

### 2.2 Installing Collect

Collect is compatible with RelativityOne. See [Getting started in RelativityOne](#) on the Documentation site for requirements.

For a Collect-only installation, you do not need the following pre-requisites:

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

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

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**Note:** You configure security permissions on Collect just as you would for any other Relativity application. For more information, see [Workspace security](#) on the RelativityOne documentation site.

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#### 2.2.1 Installing Collect from the application library


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 RelativityOne documentation site.

---

Use the following procedure to install Collect from the application library:

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

## 2.3 Permissions to run Collect

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

Object Security	Tab Visibility	Other Settings
<ul style="list-style-type: none"> <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> </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>

Object Security	Tab Visibility	Other Set- tings
<ul style="list-style-type: none"> <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>		

## 3 Matters

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

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 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 Collection 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 next to the Matter field in the Collection layout. See [Creating a collection on page 98](#).

### 3.2 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.

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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

### 3.3 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 98](#).
  - **Remove a collection from Relativity**—click **Delete** to display a pop-up window. To view child objects and associated objects, click **Dependencies**.
  - **Modify collection details**—click the **Edit** link for a collection. To modify the matter, click the **Edit** button at the top of the page.
  - **Display the collection details**—click the name of the collection.

## 4 Custodian targets

In Collect, you manage custodians that have an associated data source. The custodian target is the combination of a custodian and data source. It is an endpoint from which Collect can connect to and collect from. For example, a custodian's Google Workspace Gmail account is a custodian target. For example, a custodian's Microsoft Outlook account is a custodian target. For example, a custodian's X1 email endpoint is a custodian target.

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

In this document, the source is Collection source.

---

**Note:** Custodian targets will automatically be generated based on the primary email address in the Entity record for the Collection source data source. Custodian targets can still be generated manually. The auto-generation of targets is based on the custodian's email address. For more information, see [Creating a custodian target on the next page](#).

---

### 4.1 Custodians

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

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

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

[Manage](#)

First Name \*

Last Name \*

Email

## 4.2 Fields

The Collection Custodian layout provides the following fields:

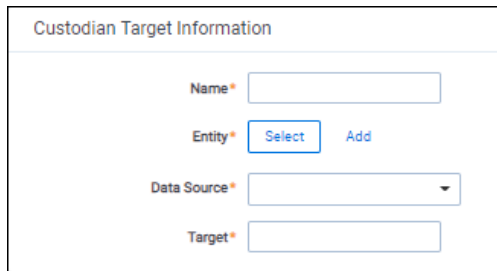
- **Custodian Type**—select one of the following:
  - **Person**—select this to enter first and last name of the individual acting as custodian of the data you wish to process.
  - **Other**—select this if the custodian of the data you wish to process is not an individual but is, for example, just a 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 does not contain a comma when you export the data associated with it.
- **Email**—the email the custodian uses in the target. This email address must match the email address within the connected data source.

## 4.3 Creating a custodian target

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

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

1. Enter the **Name** of the custodian target.
2. Click **Select** to select available custodians. If the custodian does not 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 on the next page](#).
4. Enter the custodian's email address in the **Target** field.



To avoid duplicate custodians, a custodian with multiple emails, you will need to link a second custodian target to the same entity. To make a second custodian target for the same entity, you will need to create another target.

In the target, select the same entity. Then, select the other data source and enter the target value. This way you can have multiple targets, different from the primary email address, for a single entity record.

### 4.3.1 Generating targets in the wizard

Custodian Targets can also be automatically generated in Step 4 of the Collect wizard. Click **Generate Targets** to check if targets exist for the custodians you've selected for collection. If the targets do not exist, Collect creates them based on the email address in the Entity details in each custodian. For more information, see [Collection Summary on page 102](#).

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

## 4.4 Removing custodian targets

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

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



## 5 Data sources

A data source allows you to define where and how you pull data from a communication channel. A data source stores the configuration necessary to retrieve data from a communication channel, process that data, and ingest it into Collect.

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 14](#).

When creating data sources, you can select different types of data sources for obtaining files.

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.

---

**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](#).

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4. Enter the data source-specific settings. For more information, locate your data source topic.
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, the data source is saved. If the connection fails, a message in the UI will indicate that the connection failed. If verification fails, verify that the values are correct. The data source will save when it is corrected and is verified.

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

### 5.2 Data source types

You can select any of the following data sources for step 3 of the creating a new collection source instance process:

- **Bloomberg**—select to collect data from Bloomberg Chat. For more information, see [Bloomberg chats and emails data source on page 19](#).

- **Box**—select to collect data from Box cloud storage. For more information, see [Box data source on page 21](#).
- **Google Workspace**—select to collect data from Google Chat, Drive, Gmail, or Groups. There is no support for modern attachments. For more information, see [Google Workspace data source on page 25](#).
- **iManage**—select to collect data from the iManage document and email management application. For more information, see [iManage data source on page 42](#).
- **Microsoft 365 OneDrive**—select to collect data from OneDrive accounts. Unable to collect from inactive employee sites. The Graph API does not support access to inactive user accounts. For more information, see [Microsoft 365 - OneDrive data source on page 48](#).
- **Microsoft 365 Outlook**—select to collect data from Microsoft's email application. You can choose archived mailbox, calendar, contacts, and mailbox. Inactive employee mailboxes are included with mailbox collections. For more information, see [Microsoft 365 - Outlook data source on page 56](#).
- **Microsoft 365 SharePoint**—select to collect data from Microsoft SharePoint sites. For more information, see [Microsoft 365 - SharePoint data source on page 69](#).
- **Microsoft 365 Teams**—select to collect data from Microsoft's short-messaging application. This data source is only available for commercial, Microsoft 365 tenants. Requires enhanced licensing (E5) and access to Microsoft Protected APIs. For more information, see [Microsoft 365 - Teams data source on page 76](#).
- **Refinitiv Eikon**—select to collect data from Refinitiv Eikon chats. For more information, see [Refinitiv Eikon data source on page 84](#).
- **Slack**—select to collect data from an organization or custodian's Slack profile. To get the steps to gather the temporary code and access token, see [Slack data source on page 86](#).
- **X1**—select to collect data from a custodian's emails or files stored in an X1 endpoint. Requires separate licensing, configuration, and training through a third party. For more information, see [X1 data source on page 92](#).

## 6 Bloomberg chats and emails data source

This topic provides details on how to capture Bloomberg chats and emails with Collect.

### 6.1 Creating the data source

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 **Bloomberg Chat** or **Bloomberg Email** data source:
4. Enter the required Settings information. For more information, see [Data source settings below](#).
5. Click **Save**.

Once you set up the data source, you will see the data source information on the Collect Admin page.

### 6.2 Data source settings

You need to gather the settings information listed. Then enter the data into the Settings fields:

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

### 6.3 Configuring the data source

Each data source that you can use in Collect has different search criteria when creating a collection job.

Configure the data source chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

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 you select a calendar source.

---

- **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**. 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.

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. It also includes what you can search within each data source. The criteria options change based on the selected data source.

### 6.3.1 Bloomberg chat

The following table lists the filter criteria support for Bloomberg chat collections. Entering the start date and end data criteria is not required.

Relativity collects Bloomberg chat data in Relativity Short Message Format (RSMF).

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

### 6.3.2 Bloomberg email

The following table lists the filter criteria support for Bloomberg email collections. Entering the start date and end data criteria is not required.

Relativity collects Bloomberg email data in Relativity's short message format (RSMF).

Criteria	Operators	Description	Example
Start Date	Equals	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.
End Date	Equals	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.

## 7 Box data source

This topic provides details on how to capture Box with Collect.

### 7.1 Box application setup

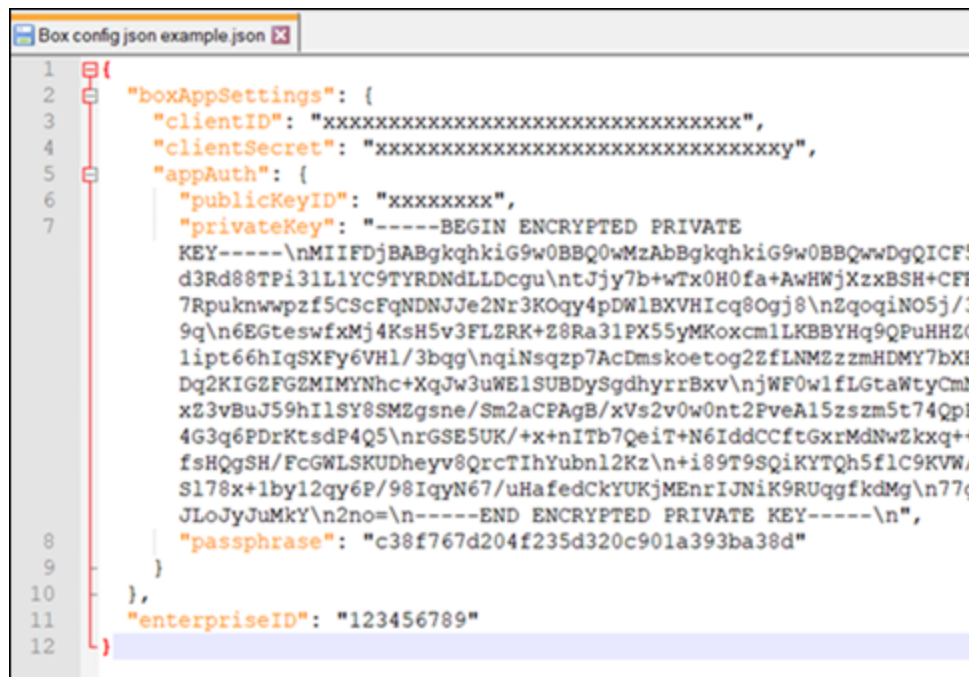
Before using the Box data source in Collect, you must create and authorize Collect as an application in Box.

#### 7.1.1 Creating an application with Box

Create and download a config.json file. For more information, see Box's <https://developer.box.com/guides/authentication/jwt/jwt-setup/>.

The config.json file will contain the values required to configure a data source connection in Collect.

1. Log into Box and navigate to the Developer Console.
2. Click **Create New App**.
3. Click **Custom App**
4. Select **Server Authentication (with JWT)**.
5. Enter an App Name.
6. Click **Create App**.
7. In App Access level, select **App Access + Enterprise Access**.
8. In Content Actions, select **Read all files and folders stored in Box** and **Write all files and folders stored in Box**.
9. In Advanced Features, select **Make API calls using as-user header** and **Generate user access tokens**.
10. Add and Manage Public Keys clicking **Generate a Public/Private Keypair**. Authentication is required for this step.



```
1 {
2   "boxAppSettings": {
3     "clientId": "xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx",
4     "clientSecret": "xxxxxxxxxxxxxxxxxxxxxxxxxy",
5     "appAuth": {
6       "publicKeyID": "xxxxxxx",
7       "privateKey": "-----BEGIN ENCRYPTED PRIVATE
      KEY-----\nMIIFDjBABgkqhkiG9w0BBQ0wMzAbBgkqhkiG9w0BBQwwDgQICF5
      d3Rd88TPi3L1LYC9TYRDNDLLDcgu\ntJjy7b+wTx0H0fa+AwHWjXzxBSH+CFR
      7Rpuknwpzf5CScFqNDNJJe2Nr3KOqy4pDWlBXVHIcq8Ogj8\nZqoqiNO5j/3
      9q\n6EGteswfxMj4KsH5v3FLZRK+28Ra3lPX55yMKoxcm1LKBBYHq9QPuHHZG
      1ipt66hIqSXFy6VHl/3bqg\nqiNsQzp7AcDmskoetog2ZfLNMZzzmHDMY7bXB
      Dq2KIGZFGZMIMYNhc+XqJw3uWE1SUBDySgdhyrrBxv\njWf0w1fLGtaWtyCmN
      xZ3vBuJ59h1lSY8SMZgsne/Sm2aCPAgB/xVs2v0w0nt2PveAl5szsm5t74QpP
      4G3q6PDrKtsdP4Q5\nnrGSE5UK/+x+nITb7QeiT+N6IddCCftGxrMdNwZkxq++
      fsHQgSH/FcGWLKUDheyv8QrcTIhYubnl2Kz\n+i89T9SQiKYTQh5f1C9KVV/
      Sl78x+1byl2qy6P/98IqyN67/uHafedCkYUKjMEEnrIJNiK9RUqgfkDmg\nn77g
      JLoJyJuMkY\n2no=\n-----END ENCRYPTED PRIVATE KEY-----\n",
      "passphrase": "c38f767d204f235d320c901a393ba38d"
9     }
10   },
11   "enterpriseID": "123456789"
12 }
```

A .json file will be downloaded to your machine. Save the file in a secure location. This file contains the values required to configure a data source connection in Collect. This file can also be downloaded from the App Settings section.

## 7.1.2 Authorizing an application

Ensure you get approval to use the Box application within your enterprise. Follow the steps provided by Box to submit for approval. For more information, see the Box documentation. Finally, you must get authorization from a Box admin to use the authentication application. For more information, see the Box documentation.

## 7.2 Creating the data source

In RelativityOne, use the following procedure to connect the Box data source to Collect:

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 **Box** data source.
4. Enter the required Settings information. You can find this information in the .json file. For more information, see [Data source settings on the next page](#).
5. Click **Save**.

For more information, see [Creating a collect data source on page 17](#).

## 7.3 Data source settings

You need to gather the settings information listed. You can find this information in the .json file. Then enter the data into the Settings fields:

- **Client ID**—enter the Client ID of the requesting application. This can be found with authorization\_code, client\_credentials, or urn:ietf:params:oauth:grant-type:jwt-bearer as the grant\_type.
- **Client Secret**—enter the client secret of the requesting application to gain an access token.
- **Public Key ID**—enter the Public Key ID of the requesting application that you found in your app configuration settings .json file.
- **Private Key**—enter the encrypted private key that you found in your app configuration settings .json file.
- **Passphrase**—enter the pass phrase that you found in your app configuration settings .json file.
- **Enterprise ID**—enter the Enterprise ID that you found in your app configuration settings .json file.

### 7.3.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, client secret, and other credentials with Box.

## 7.4 Configuring the data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

Add search 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 you select a calendar source.

---

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

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

Criteria	Operators	Description	Example
Created Date	Greater Than or Equals,	When you use the Creation Date property in a query, the search returns all messages	If you search "Greater Than 1/1/2001," your results

Criteria	Operators	Description	Example
	Less Than or Equals	that equal/doesn't equal, greater/less than the date entered.	include all messages created after January 1, 2001.
Modification Date	Greater Than or Equals, Less Than or Equals	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.



## 8 Google Workspace data source

This topic provides details on how to capture Google Chats, Drive, Groups, and emails with Collect. Relativity collects Google Drive data using the Vault API.

### 8.1 Considerations

Note the following considerations about this data source:

- Collection of Calendar is currently unsupported.
- Google does not have a date range limitation. We recommend limiting the date range of the collection. Extended date ranges can increase collection time and potentially create issues.

### 8.2 Google Workspace account setup

Connecting your Google Workspace to Collect takes some setup in Google and Relativity. Begin with the credential setup in Google.

#### 8.2.1 Creating a Google Cloud project

Create a Google Cloud project to create, enable, and use all Google Cloud services. You will use this account to manage APIs.

To create a Google Cloud project:

1. Open the Cloud Resource Manage page, click **Create Project**.
2. Enter information into the fields:
  - **Project name**—enter a memorable name for your project.
  - **Organization**—enter the name of your organization.
  - **Location**—enter the parent organization or folder.
3. Click **Create**.

#### 8.2.2 Enable required APIs for the Project

Continuing in this process, you now need to enable the required Google Cloud Console APIs and associate them to a new project.

To start enabling APIs:

1. In the Google Cloud Console, select the newly created project.
2. In the left-navigation menu, select **API & Services > Library**. This will open up the Library page that includes all available APIs.
3. Enter *Google Vault API* in the search bar and search.
4. Click the **Google Vault API** option.
5. Click **Enable**.

6. In the top left corner, click the Back arrow icon. This will take you back to the search results page with the search bar.
7. Enter *Admin SDK API* in the search bar and search.
8. Click the **Admin SDK API** option.
9. Click **Enable**.
10. In the top left corner, click the Back arrow icon. This will take you back to the search results page with the search bar.
11. Enter *Cloud Storage API* in the search bar and search.
12. Click the **Cloud Storage API** option.
13. Click **Enable**.

---

**Notes:** This API may be enabled by default.

---

### 8.2.3 Setup OAuth2 consent screen

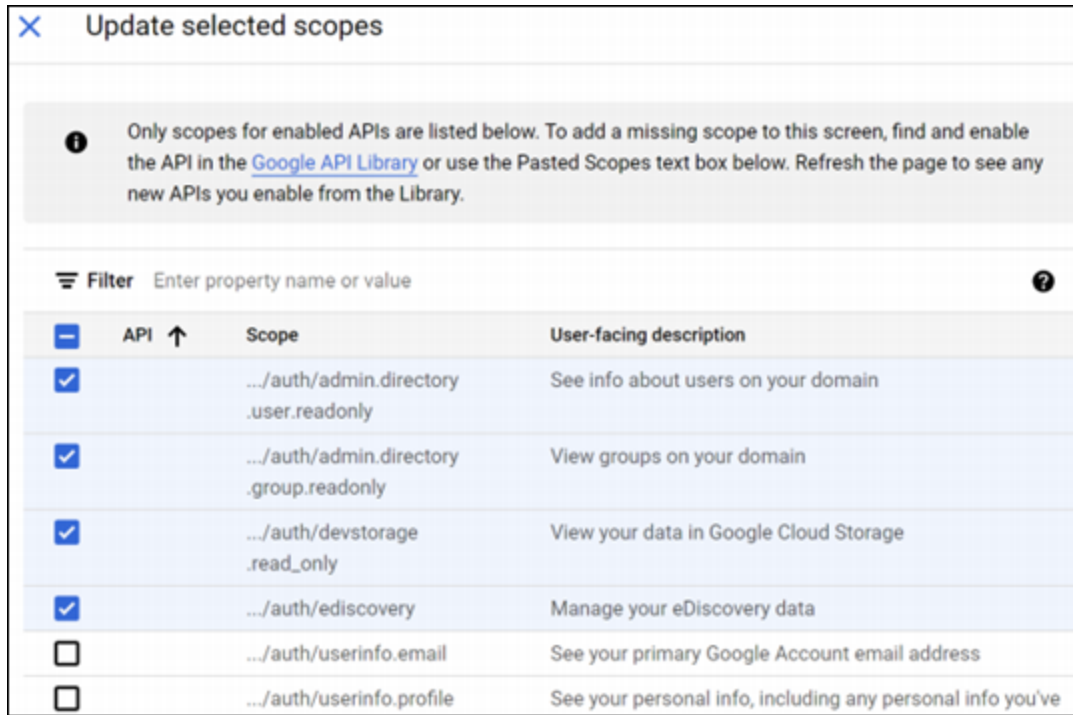
Follow the steps to create a OAuth2 consent screen.

1. Open <https://console.cloud.google.com/> and select newly created project.
2. Click on the Navigation menu.
3. Select **APIs & Services>OAuth consent screen**.
4. Select **Internal** type.
5. Click **Create**.
6. Enter descriptive App name. For example, *Relativity Collect*.
7. Enter a **User support email** from within your organization.
8. Enter **relativity.one** as **Authorized Domain**.
9. Enter an email address from within your organization in the **Developer Contact Information** field.
10. Click **Save and Continue**.

On the next step, you will want to add scopes.


1. Click **Add or remove scopes**.
2. Enter filter and select required scopes one at a time, or enter them in a text box.  
The scopes are:
  - <https://www.googleapis.com/auth/ediscovery>
  - [https://www.googleapis.com/auth/devstorage.read\\_only](https://www.googleapis.com/auth/devstorage.read_only)
  - <https://www.googleapis.com/auth/admin.directory.user.readonly>

- <https://www.googleapis.com/auth/admin.directory.group.readonly>



3. Click **Update**.
4. Click **Save and Continue**.

## 8.2.4 Create credentials

1. Click  in the top left corner.
2. Hover over **APIs & Services > Credentials**.
3. Click **Create Credentials**.
4. Click **OAuth Client ID** credentials.
5. Enter the following information in the fields:

- **Application type**—select Web application
- **Name**—enter a name for the credentials
- **Authorized redirect URIs**—enter the URI based on the RelativityOne Data Center Geo you intend to run collections from.

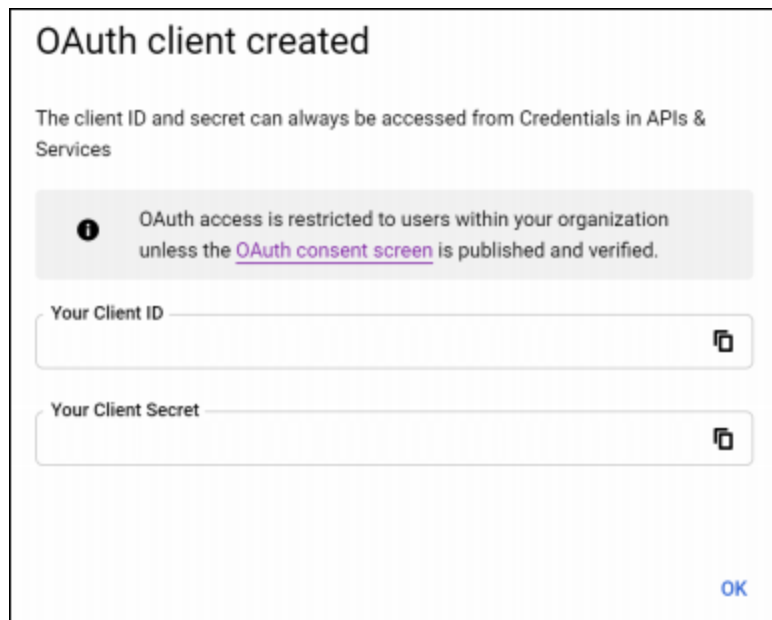
RelativityOne Data Center Geo URIs

- **Asia (East)**—<https://services.esas.relativity.one/collect-oauth-authorization/index.html>
- **Asia (Southeast)**—<https://services.seas.relativity.one/collect-oauth-authorization/index.html>
- **Australia**—<https://services.auea.relativity.one/collect-oauth-authorization/index.html>

- **Brazil (South)**—<https://services.brso.relativity.one/collect-oauth-authorization/index.html>
- **Canada (Central)**—<https://services.cact.relativity.one/collect-oauth-authorization/index.html>
- **Europe (North)**—<https://services.noew.relativity.one/collect-oauth-authorization/index.html>
- **Europe (West)**—<https://services.wseu.relativity.one/collect-oauth-authorization/index.html>
- **Germany (West Central)**—<https://services.dect.relativity.one/collect-oauth-authorization/index.html>
- **India (Central)**—<https://services.inct.relativity.one/collect-oauth-authorization/index.html>
- **Japan**—<https://services.jpse.relativity.one/collect-oauth-authorization/index.html>
- **Korea (Central)**—<https://services.krct.relativity.one/collect-oauth-authorization/index.html>
- **Switzerland**—<https://services.chno.relativity.one/collect-oauth-authorization/index.html>
- **United Arab Emirates**—<https://services.aeno.relativity.one/collect-oauth-authorization/index.html>
- **United Kingdom (South)**—<https://services.ukso.relativity.one/collect-oauth-authorization/index.html>
- **United States (Central)**—<https://services.ctus.relativity.one/collect-oauth-authorization/index.html>
- **United States (East)**—the United States (East) geo has six URIs associated to the pod that you're RelativityOne tenant is assigned to. Contact [Relativity Support](#) to confirm which URI to use.
  - **RelativityOne pod esus025000**—<https://services.esus.relativity.one/collect-oauth-authorization/index.html>
  - **RelativityOne pod esus025064**—<https://services-02.esus.relativity.one/collect-oauth-authorization/index.html>
  - **RelativityOne pod esus025128**—<https://services-03.esus.relativity.one/collect-oauth-authorization/index.html>
  - **RelativityOne pod esus025192**—<https://services-04.esus.relativity.one/collect-oauth-authorization/index.html>
  - **RelativityOne pod esus008064**—<https://services-05.esus.relativity.one/collect-oauth-authorization/index.html>
  - **RelativityOne pod esus022064**—<https://services-06.esus.relativity.one/collect-oauth-authorization/index.html>

#### 6. Click **Create**.

After clicking Create, you will have your Client ID and Client Secret. Add them to the New Collection Source Instance.



### 8.2.5 Setting reauthentication policy

As an optional step, you will want to configure Google's reauthentication policy as follows:

1. Open <https://admin.google.com/ac/home> and select newly created project.
2. Click on the Navigation menu.
3. Select **Security > Access and data control > Google Cloud session control**.
4. On the Google Cloud session control, select a reauthentication policy.
  - **Never require reauthentication**
  - **Require reauthentication**

---

**Note:** If you select Require authentication, you must also select **Exempt Trust apps**.

---

5. Click **Save**.

For more information on setting reauthentication policy and the options, see Google's documentation.

## 8.3 Google Workspace user account setup

Collections require user account on which behalf Relativity exports data. This can be a dedicated or an existing user account.

### 8.3.1 Create admin role for Vault API

1. Open <https://admin.google.com/ac/home>.
2. Click **Account>Admin roles** to open the up the page.

3. Click **Create New Role**.
4. Enter the role name. We recommend *Relativity Collect*.
5. Click **Continue** to select privileges.
6. Select the following privileges:
  - Services - Google Vault > Manage Matters
  - Services - Google Vault > Manage Searches
  - Services - Google Vault > Manage Exports
7. Click **Continue**.
8. Click **Create Role**.

### 8.3.2 Create admin role for the user accounts listing

1. Open <https://admin.google.com/ac/home>.
2. Click **Account>Admin roles** to open the up the page.
3. Click **Create New Role**.
4. Enter the role name. We recommend *Users Reader for Collect*.
5. Click **Continue**.
6. Select the **Admin API privileges - Users > Read** privilege.
7. Click **Continue**.
8. Click **Create Role**.

### 8.3.3 Create admin role for the groups listing

1. Open <https://admin.google.com/ac/home>.
2. Click **Account>Admin roles** to open the up the page.
3. Click **Create New Role**.
4. Enter the role name. We recommend *Groups Reader for Collect*.
5. Click **Continue**.
6. Select the **Admin API privileges - Groups > Read** privilege.
7. Click **Continue**.
8. Click **Create Role**.

### 8.3.4 Enable required privileges

1. Open <https://admin.google.com/ac/home>.
2. Navigate to **Directory > Users** to open the list of users.

3. Select or create the user you want to use.
4. Select and expand **Admin roles and privileges** pane.
5. Assign the following roles to the user in All organizational units scope.
  - Relativity Collect
  - Users Reader for Collect
  - Groups Reader for Collect

## 8.4 Restricting collections to the selected user accounts

You can restrict collections to the selected group of users by leveraging admin role scoping to organizational units. To limit collections, you will need to create an organizational unit and add the users to the unit. Once created, Collect will only collect data from the users within the organizational unit.

This configuration step is for Google Workspace data sources only and is optional.

### 8.4.1 Create an organizational unit

An organization unit restricts RelativityOne's collections only to the selected custodians. Create an organization unit and add selected custodians to the unit so only their information is collected.

To create an organizational unit, open Google Admin Console and follow the steps below:

1. Open <https://admin.google.com/ac/home>.
2. Navigate to **Directory > Organizational Units**.
3. On the Manage organizational units page, click the plus **+** icon.
4. In the **Create new organizational unit** pop-up menu, enter the Name of organizational unit.
5. (Optional) Enter description of the organizational unit.
6. Select the **Parent Organization Unit (POU)**. If this field isn't populated, add a POU. To create a POU, follow the steps in Google's documentation.
7. Click **Create**.

Once the organizational unit is created, the next step is to add targeted users you want to collect from to the unit.

To add users to the organizational unit, follow the steps below:

1. Click the navigation menu.
2. Navigate to **Directory > Users**.
3. Select the users who should have collections restricted
4. Click **Change organizational unit**.
5. In the Change organizational unit pop-up menu, select appropriate organizational unit.
6. Click **Continue**.
7. Click **Confirm**.

You can upload a .csv file to bulk update users. For more information, see Google's documentation.

### 8.4.2 Scope user privileges to the organizational unit

1. Open <https://admin.google.com/ac/home>.
2. Navigate to **Directory > Users**.
3. Select or create a user account.
4. Select and expand the **Admin roles a privileges** pane.
5. Click the pencil icon.
6. Edit the scope of the role to the appropriate organization unit.
7. Click **Save**.

Groups Reader privilege can only be scoped to *All organizational units*. This privilege is only required to enable collections from Google Workspace Groups and it can be omitted. Doing so will disable Groups collections on behalf of this user account.

## 8.5 Creating the data source

After completing the steps covered above for Google Workspace account setup and user account setup, you can then configure your first Google data source in the Collect application.

---

**Caution:** After generating the Refresh Token in [Step 11](#) below for the first Google data source, be sure to save the token value in a secure location, as it will be needed to set up additional Google data sources. Google only allows **one** refresh token to be generated. If you attempt to generate another refresh token, it will **invalidate** the original token, and you will **not** receive a new one, which will break the data source connection to Google. When setting up additional Google data sources in the Collection application, paste the refresh token value that you saved in a secure location into the refresh token field and click Save.

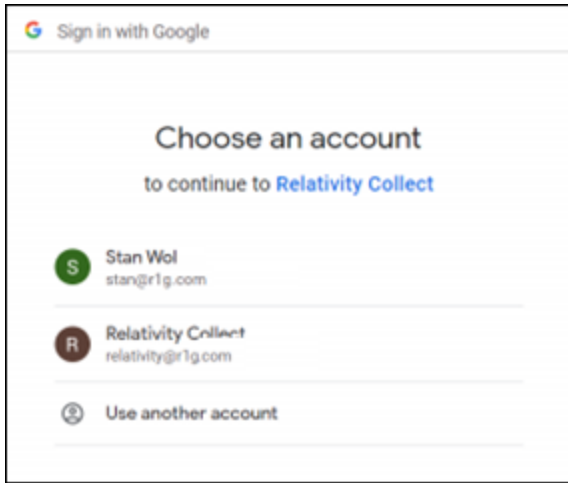
---

To add the Google Workspace data source, follow the steps below:

1. Within the Collect application, navigate to the **Collection Admin** tab.
2. Click the **New Collection Source Instance** button.
3. Enter in a unique name for the data source.
4. Select a **Google Workspace** data source.
5. In the Settings pane, enter **Client Id** and **Client Secret** copied from Google's OAuth2 credentials page. For more information, see [Create credentials on page 27](#).
6. Click **Generate Code**.



7. Select or sign into Google's account on which behalf collections will be performed.



8. Click **Copy Temporary Code** to copy to your clipboard.
9. Once copied, you can close that window and return back to RelativityOne.
10. In Collect, paste the code in the **Temporary Code** field.
11. Click **Generate Refresh Token**.

The access token will be generated and populated in the **Refresh Token** field. Refer to the [Caution](#) above regarding Refresh Tokens.

12. Click **Save**.

## 8.6 Configuring the data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

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**. 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.

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. It also includes what can be searched within each data source. The criteria options change based on the selected data source.

The following table lists the filter criteria support for Google Workspace Chat collections. Google Workspace Chat data is collected in RSMF.

### 8.6.1 Google Groups

Setting criteria for Google Groups is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

The following table lists the filter criteria support for Google Workspace Groups collections. Setting criteria for Google Workspace Groups is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see <a href="#">Google Workspace documentation</a> .	For more information on Advanced examples, see <a href="#">Google Workspace documentation</a> .
Email BCC	Contains	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 CC	Contains	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 From	Contains	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	Equals, Does	When you use the Email	If you search "Less Than 1/1/2021," your results

Criteria	Operators	Description	Example
Received Date	Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	Received Date property in a query, the search returns all messages that equal/doesn't equal, greater/less than the date entered.	include all emails received before January 1, 2021.
Email Sent Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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 To	Contains	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.
Has Attachments	Equals, Does Not Equal	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 attachment.
Is Draft	Equals	Indicates whether or not messages are written and not sent. Use the values true or false.	If you mark toggle the Value setting On, your results include all emails that are in the drafted state.
Keyword Search	Search In	When you use the Keyword Search property in a query, the search returns all messages that contain the text you are searching for.	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 enter keywords in separate lines.
Label	Equals	When you use the Label property, the search returns all messages that contains the search	If you search "Important," your results include all emails that are marked with the "Important" label.

Criteria	Operators	Description	Example
		word or phrase in the emails' label.	
Subject	Contains	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."

Included in the Google Workspace Groups Criteria is one toggle:

- **Collect all email with attachments regardless of criteria**—enable the toggle to collect emails and attachments. Disable to collect only emails that match the criteria.

## 8.6.2 Gmail

Setting criteria for Google Drive is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

The following table lists the filter criteria support for Google Workspace Gmail collections. Setting criteria for Google Workspace Gmail is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see <a href="#">Google Workspace documentation</a> .	For more information on Advanced examples, see <a href="#">Google Workspace documentation</a> .
Email BCC	Contains	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 CC	Contains	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.

Criteria	Operators	Description	Example
Email From	Contains	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 Received Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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 1/1/2021,” your results include all emails received before January 1, 2021.
Email Sent Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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 To	Contains	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.
Has Attachments	Equals, Does Not Equal	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 attachment.
Is Draft	Equals	Indicates whether or not messages are written and not sent. Use the values true or false.	If you mark toggle the Value setting On, your results include all emails that are in the drafted state.
Keyword Search	Search In	When you use the Keyword Search property in a query, the search	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

Criteria	Operators	Description	Example
		returns all messages that contain the text you're searching for.	"Dear" OR "John". In order to do that you need to enter keywords in separate lines.
Label	Equals	When you use the Label property, the search returns all messages that contains the search word or phrase in the emails' label.	If you search "Important," your results include all emails that are marked with the "Important" label.
Subject	Contains	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."

Included in the Google Workspace Gmail Criteria is one toggle:

- **Collect all email with attachments regardless of criteria**—enable the toggle to collect emails and attachments. Disable to collect only emails that match the criteria.
- **Collect Linked Files**—enable the toggle to collect linked files related to Gmail emails in the mailbox export. Linked files can be, for example, PDF file, picture file, PowerPoint file, and so forth, that is linked from Google. Disable to exclude linked files related to Gmail emails in the mailbox export.

### 8.6.3 Google Drive

Setting criteria for Google Drive is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

The following table lists the filter criteria support for Google Workspace Drive collections. Setting criteria for Google Workspace Drive is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see <a href="#">Google Workspace documentation</a> .	For more information on Advanced examples, see <a href="#">Google Workspace documentation</a> .
File Type	Equals	When you use the File Type property in a query, the search returns all files that equals what is entered.	If you select "Google Sheets" as your value, your results include Google Sheet files.

Criteria	Operators	Description	Example
Filename	Contains	When you use the Filename property in a query, the search returns all files that contain the value entered.	If you search "Important_Document," your results include all files with "Important_Document" in the filename.
Keyword Search	Search In	When you use the Keyword Search property in a query, the search returns all files that contain the text you're searching for.	If you search "Dear John," your results include all messages that contain the text in the file. Note that this is not the same as searching for "Dear" OR "John". In order to do that you need to enter keywords in separate lines.
Modification Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Modification Date property in a query, the search returns all files that equal/doesn't equal, greater/less than the selected date.	If you search "Less Than 1/1/2021," your results include all files received before January 1, 2021.
Owner	Contains	When you use the Owner property in a query, the search returns all messages that contain the text in the Owner field.	If you search "Iscovery," your results include all files sent by people with the "Iscovery" in their name, such as "Ed Iscovery."
Shared By	Contains	When you use the Shared By property in a query, the search returns all files that contain the text in the Shared By field.	If you search "ExampleUser1," your results include all files shared by people with the UserExample1 in their name.
Shared With	Contains	When you use the Shared With property in a query, the search returns all files that contain the text in the Shared With field.	If you search "UserExample1," your results include all files shared with people with the UserExample1 in their name.
Version Date	Equals	When you use the Version Date property in a query, the search returns the version of files on the selected date.	If you search 1/1/2021, your results include only the version of the files on 1/1/2021. The results won't include earlier or later versions of the file.

Included in the Google Workspace Drive Criteria is one toggle:

- **Collect files from shared drives**—enable the toggle to retrieve data from shared drives, along with personal drives, that match the criteria. Disable to collect only data from personal drives that match the criteria.

### 8.6.4 Google Chat

Setting criteria for Google Workspace Chat is not required. For more information on Advanced examples, see [Google Workspace documentation](#).

Criteria	Operators	Description	Example
Advanced	Equals	When you use the Advanced property in a query, specific Google Workspace search criteria become available in Collect. For more information, see <a href="#">Google Workspace documentation</a> .	For more information on Advanced examples, see <a href="#">Google Workspace documentation</a> .
Content Type	Equals	When you used the Content Type property in a query, the search returns messages with specific file types.	If you search with the value set to Google Docs, your results include all Google Docs sent as messages.
Keyword Search	Equals	When you use the Keyword Search property in a query, the search returns all messages that contain the text you're searching for.	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 enter keywords in separate lines.
Message Source	Equals	When you use the Message Source property in a query, the search returns all direct messages or all messages in rooms.	If you search with the value set to "Messages in Rooms," your results include only messages sent in a group chat and no direct messages will be included.
Sent/Updated Date	Greater Than or Equals, Less Than, Less Than or Equals	When you use the Sent/Updated 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 sent after January 1, 2001.
Slice Interval in Hours	Equals	When you use The Slice Interval in Hours property, the search returns all messages in a specific time range or defaults the slice interval to 24 hours.	If you search with a slice interval set to one hour and a conversation spans five hours, you will end up with five RSMFs after processing.
User At	Contains	When you use the User At property in a query, the search returns all messages that contain the text in the User At field.	If you search "UserExample1" your results include all messages sent to people with the UserExample1 in their email address.
User From	Contains	When you use the User From property in a query, the search returns all messages that contain the text in the User From field.	If you search "ExampleUser1," your results include all messages sent by people with the UserExample1 in their email address.

Included in the Google Workspace Chat Criteria are two toggles:



- **Include results from Rooms**—enable this toggle to include all messages in rooms, along with direct messages, that match your query. Disable to collect only direct messages that match your query.
- **Disable RSMF conversion**—enable this toggle to keep data in its original format by preventing Relativity from converting the files into Relativity's short message format (RSMF) files.

## 8.7 Troubleshooting

This table includes troubleshooting for Google's data sources.

Error	Cause	Resolution
The token is invalid. You must remove access and generate a new refresh token. For more information, see <a href="#">Troubleshooting above</a> .	Your token is invalid. This could be due to changing the account owner.	While signed in with your account, navigate to <a href="https://my-account.google.com/u/0/permissions">https://my-account.google.com/u/0/permissions</a> . In the page, click <b>Remove Access</b> . Then generate a new refresh token. For more information on generating a refresh token, see <a href="#">Creating the data source on page 32</a>

## 9 iManage data source

This topic provides details on how to capture iManage with Collect.

Your iManage account needs to have an iManage support account. You must also connect it to Collect.

To get an iManage support account, see the <https://help.imanage.com/hc/en-us/sections/360010959633-Technology-Partner>. For further guidance, reach out to [robert.weiss@imanage.com](mailto:robert.weiss@imanage.com). To create a ticket with iManage, see <https://help.imanage.com/hc/en-us>. You can also email [support@imanage.com](mailto:support@imanage.com), [techpartners@imanage.com](mailto:techpartners@imanage.com), and [devsupport@imanage.com](mailto:devsupport@imanage.com).

### 9.1 Considerations

If you are a RelativityOne Government customer and are using iManage Cloud, you do not need to take different steps to authenticate or to collect data.

If you are using iManage Cloud Classic, you will need to add your tenant-specific iManage API endpoint URL to the allowlist in RelativityOne Government before running collections. This is because in Cloud Classic, the endpoints are unique for each iManage customer. You will need to work with the RelativityOne implementation team to add your API endpoint URL to the allowlist.

### 9.2 Prerequisites

Before configuring the Collect application in your iManage tenant, you need to submit an email to [appregistration@imanage.com](mailto:appregistration@imanage.com). The sender's email address must be associated with a valid iManage Help Center account.

In the email, request to add the Collect application to your iManage tenant. The request should include:

- The following statement: This is for the Relativity Collect application.
- Your organization, or company, name.
- Your iManage tenant ID.

### 9.3 Application setup

To set up an application, you need to have the App Management role permission. For more information, see [iManage documentation](#). When you have this permission, configure the application:

1. In the iManage Control Center, navigate to the **Settings > Applications** pane.
2. Click **Add Application**.
3. In the available applications list, search for and select the **Relativity Collect** application.
4. Click **Authentication** to configure the OAuth settings for single sign-on.
5. In the OAuth settings:
  - **Allow Refresh Token**—No
  - **Refresh Token Expiry**—default, 365 days
  - **Access Token Expiry**—default, 30 minutes

6. Click **Access** to configure which users can use the Relativity Collect application.
7. Set **Allow Access** to *Custom* to give access to specific users or groups to use the application.
8. Search for and select the user account you want to provide access to use the application.

---

**Note:** Collect requires this account and the associated password when setting up the iManage data source connection in RelativityOne.

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9. Select **Review** to view your changes.
10. Click **Finish**.

Once you have completed setting up the application,

1. Click on the application in the Applications Explorer.
2. Click **View**.

You can see the Client ID in the application view. iManage does not display the Client Secret in the UI. iManage will provide it to you.

---

**Notes:**

- You'll need the Client ID and Client Secret for setting up your iManage data source connection in the Collect application.
  - Relativity bases permissions off the account you selected for granting application access to. The scope of what is visible for collections will be dependent on the permissions of that user account.
- 

### 9.3.1 Permissions

Collect bases the permissions off the account you use to authenticate with the iManage API. You can locate this account's username and credentials in the configuration file under the settings *Username* and *Password*. The module will only be able to discover items that the account specified by username has access to.

### 9.3.2 Throttling

Collect handles throttling by reading the response headers for each API call Relativity makes for the header *x-ratelimit-remaining*. When that header value returns 0, Relativity looks for another header value called *x-ratelimit-reset*. The *x-ratelimit-reset* value specifies the amount of time in seconds to wait until Collect no longer needs to. After the wait, the module will retry the throttled API call.

## 9.4 Creating the data source

In RelativityOne, use the following procedure to connect the iManage data source to Collect:

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 **iManage** data source.

4. Enter the required information in Settings. For more information, see [Settings fields below](#).
5. Click **Save**.

For more information, see [Creating a collect data source on page 17](#).

## 9.5 Settings fields

To connect Relativity to an iManage data source, you need to gather and enter the information for the following fields:

- **Client ID**—enter the Client ID for the application.
- **Client secret**—enter the Client Secret for the application.
- **Username**—enter the iManage user name.
- **Password**—enter the iManage password.
- **Library ID**—enter the name of the iManage database.
- **iManage Base address**—enter the base address that points to the domain or sub-domain of your iManage Cloud instance. For example, <https://cloudimanager.com>, <https://CustomSubdomain.cloudimanager.com> or <https://example.goimanager.com>, <https://CustomSubDomain.goimanager.com>. If the URL contains [cloudimanager.com](https://cloudimanager.com) Collect targets the cloud, if it does not contain that, Collect targets classic cloud.

### 9.5.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with iManage.

## 9.6 Configuring the 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.

Add search 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.

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**Notes:** This field is only required if you select a calendar source.

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

The following table lists the filter criteria support for iManage collections. Entering the start date and end date criteria is not required.

The following table lists the filter criteria supported for iManage collections. Setting criteria for iManage is not required. If you have not selected criteria, Relativity collects all results by default. All dates are in Coordinated Universal Time (UTC).

The Less Than operator is only supported when used in conjunction with Greater Than or Equals.

Criteria	Operators	Description	Example
Anywhere Search Term	Equals	When you use the Anywhere Search Term property in a query, the search returns all data containing the searched text.	If you search "RelativityOne," your results include all files that contain the searched text in the file.
Body Search Term	Equals	When you use the Body Search Term property in a query, the search returns all data that matches the text you are searching.	If you search "Dear John," your results include all data that contains the text in body. Note that this is not the same as searching for "Dear" OR "John". In order to do that you need to enter keywords in separate lines.
Creation Date	Greater than or equals; Less than or equals	When you use the Creation Date property in a query, the search returns all data that equals greater/less than the date entered.	If you search "Greater than or equals 1/1/2001," your results include all emails sent on and after January 1, 2001.
File Extension Exclusion	Equals	When you use the File Extension Exclusion property, the search returns data without the entered file extension.	If enter .csv, your results include all data that does not include .csv files.
File Extension Inclusion	Equals	When you use the File Extension Inclusion property, the search returns data with the entered file extension.	If enter .csv, your results include all data that does include .csv files.
iManage Workspace Name	Equals	When you use the iManage Workspace name property, the search returns all data within the workspaces that equals the search word or phrase in the workspace's name.	If you use the iManage Workspace Name property in a query, the search returns all data that the workspace name equals the text you're searching. In other words, the query doesn't return only the data from channels that have an exact match. For example, if you search for "finance_team," your results include data from workspaces like "finance_team_project."

Criteria	Operators	Description	Example
Received Date	Greater than or equals; Less than or equals	When you use the Received Date property in a query, the search returns all messages that equals, greater/less than the date entered.	If you search "Less than or equals 1/1/2023," your results include all data received on and before January 1, 2021.
Recipient SMTP	Equals	When you use the Recipient SMTP property in a query, the search returns all data that matches the text in the Recipient SMTP field.	If you search "iManage," your results include all messages sent to iManage SMTPs.
Sender SMTP	Equals	When you use the Sender SMTP property in a query, the search returns all data that matches the text in the Sender SMTP field.	If you search "iManage," your results include all messages sent from iManage SMTPs.
Sent Date	Greater than or equals; Less than or equals	When you use the Sent Date property in a query, the search returns all data that is greater than or equals or less than or equals the date entered.	If you search "Greater than or equals 1/1/2001," your results include all data sent on or after January 1, 2001.
Subject Search Term	Equals	When you use the Subject Search Term property, the search returns all messages that contains the search word or phrase in the data's subject.	If you use the Subject Search Term property in a query, the search returns all data that the subject line contains the text you're searching. 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 includes data with the subject "Quarterly Financials 2023."
Edit Date	Greater than or equals; Less than or equals	When you use the Edit Date property in a query, the search returns all data that equals greater/less than the date entered.	If you search "Greater Than 1/1/2001," your results include all documents edited after January 1, 2001
Document Class	Equals	When you use the Document Class prop-	If you search for a document class that equals one of your custom-defined class categories, your res-

Criteria	Operators	Description	Example
		erty, the search returns data with the entered document class	ults will include documents only in that class.
Document Subclass	Equals	When you use the Document Subclass property, the search returns data with the entered document subclass	If you search for a document subclass that equals one of your custom-defined subclass categories, your results will include documents only in that class.
iManage Custom1-16 value	Equals	When you use the iManage Custom1-16 Value properties in a query, the search returns all data that equals the entered value in its Custom 1 Property within iManage.	If you search for an iManage Custom1-16 value, your results will include documents that match your custom value between 1 and 16. For more information, see <a href="#">iManage custom fields documentation</a> .
iManage Custom21-24 Value	Greater than or equals; Less than or equals	When you use the Edit Date property in a query, the search returns all data that equals greater/less than the date entered.	If you search for an iManage Custom21-24 value, your results will include documents that match your custom value between 1 and 16. For more information, see <a href="#">iManage custom fields documentation</a> .
iManage Custom25-28 Value	Equals, Does Not Equal	When you use the iManage Custom25 Value property in a query, the search returns all data that matches the entered value in its Custom 25 Property within iManage.	If you search for an iManage Custom25 value, your results will include documents that match your custom value 25. For more information, see <a href="#">iManage custom fields documentation</a> .
iManage Custom29-30 Value	Equals	When you use the iManage Custom29-30 Value property in a query, the search returns all data that equals the entered value in its Custom 29-30 Property within iManage.	If you search for an iManage Custom29-30 value, your results will include documents that match your custom value between 29-30. For more information, see <a href="#">iManage custom fields documentation</a> .

# 10 Microsoft 365 - OneDrive data source

This topic provides details on how to capture Microsoft 365 OneDrive with Collect.

## 10.1 Considerations

Relativity cannot collect inactive employee mailboxes. The Graph API does not support access to inactive mailboxes.

## 10.2 Accessing Microsoft 365 tenants

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. You will use this ID and secret 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.

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

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 10.2.1 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

Start with registering your app by following the steps below:

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

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1. Open your [Azure Portal](#).
2. Navigate to the **App registrations** page.
3. Click **New Registration** to display the Register an application page.
4. Enter an application name in the **Name** field.
5. Select **Accounts in this organizational directory only** as the supported account type.
6. Click **Register**.

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

From the app's page, add permissions to the web API. To add correct permissions based on your selected Microsoft 365 data source, follow the steps below:



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**Note:** Most steps and some permissions are the same for each data source. We recommend running through all steps for each data source.

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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

API / Permissions name	Type	Description	Admin consent requ...
▼ Microsoft Graph (7)			
Calendars.Read	Application	Read calendars in all mailboxes	Yes
Contacts.Read	Application	Read contacts in all mailboxes	Yes
Files.Read.All	Application	Read files in all site collections	Yes
Mail.Read	Application	Read mail in all mailboxes	Yes
Sites.Read.All	Application	Read items in all site collections	Yes
User.Read	Delegated	Sign in and read user profile	No
User.Read.All	Application	Read all users' full profiles	Yes

6. Click **Add permissions**.
7. Click **Grant Permission**.

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.

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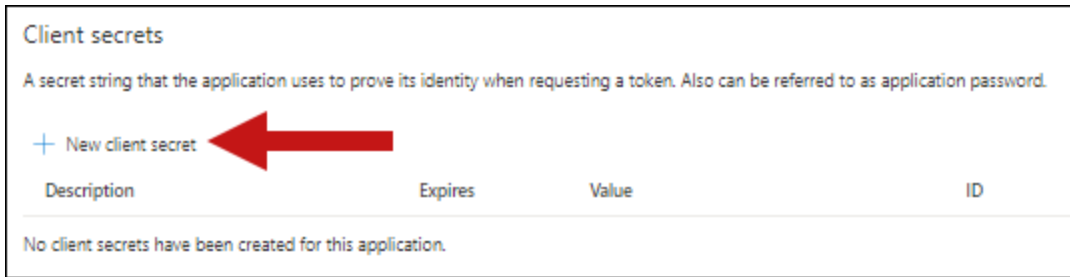
**Notes:** If you do not have the ability to grant Admin consent for application permissions, you will need to find an Admin that can consent.

---

Once clicked, the window will show all permissions granted.

1. Verify that you granted all permissions.
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 the maximum time - **24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it in your text document.

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**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 forgotten or lost secret.

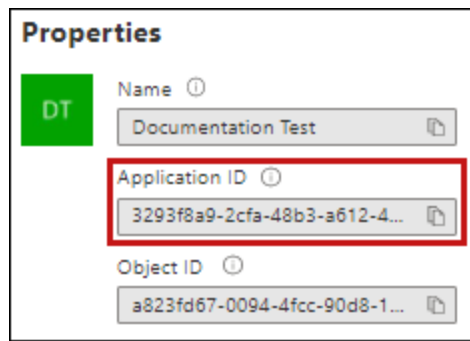
---

Provide your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.

## 10.3 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. Click the copy icon next to the Application ID.



## 10.4 Limiting application registration access to accounts

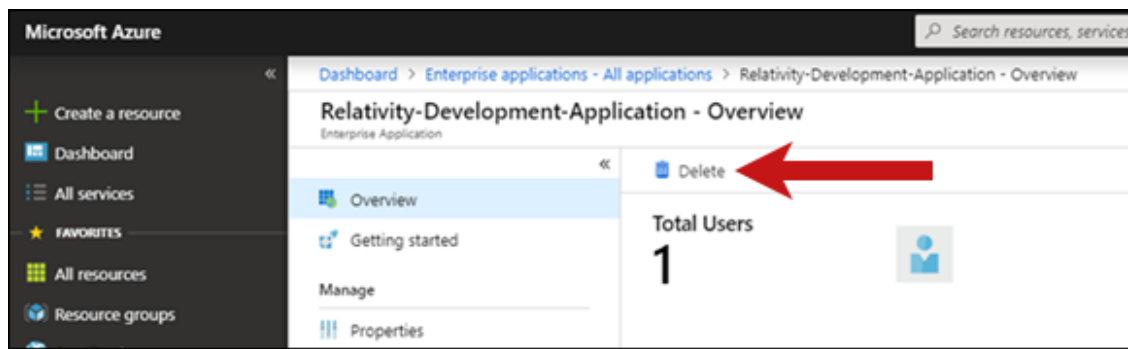
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 10.5 Revoking application access

You can revoke the application 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. Click the application link.
5. Click **Delete**. Collect no longer has access.



### 10.5.1 Revoking access via Powershell

Use the *Remove-MsolServicePrincipal* script to revoke access through Powershell. 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
```

## 10.6 Creating the 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.

1. Click the **New Collection Source Instance** button.
2. Enter a unique name for the data source.
3. Select **Microsoft 365 OneDrive**.

---

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

---

4. Enter the required information in Settings. For more information, see [Settings fields below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Relativity saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. Relativity will save the data source when you correct it and it's verified.

Once you complete the data source setup, you will see the data source information on the Collect Admin page.

## 10.7 Settings fields

To connect Relativity to a Microsoft OneDrive data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the Domain name of the Microsoft 365 tenant you intend to collect from.
- **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.

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. The parameters will be saved when verified. If the Relativity cannot verify the parameters, you will get an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. Relativity does not save the parameters until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 10.7.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 10.8 Configure data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

### 10.8.1 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.

---

**Note:** This field is only required when you select a calendar source.

---

- **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**. 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.

#### 10.8.1.1 Criteria

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. It also includes what you can search within each data source. The criteria options change based on the Microsoft 365 Archived mailbox data source.

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

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 48](#).

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. You should add keywords and phrases 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	Description	Example
File Extension	Equal, Does Not Equal, Contains	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.
File Path	Equal, Does Not Equal, Contains	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	Equal, Does Not Equal, Contains	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 filename.
Creation Date	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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	Equals, Does Not Equal, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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.

Criteria	Operators	Description	Example
Keyword Search	Search In	When you use the Keyword Search property in a query, the search returns all files containing the searched text.	If you search "Relativity," your results include all files that contain the searched text in the file.

---

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

---

## 10.8.2 Collecting preserved files

When running a collection with Microsoft data sources, Relativity collects all available files, including preserved files. You do not need to take extra steps 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 Recoverable 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. Microsoft stores preserved emails in the Recoverable Items folder and preserved files 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 [Microsoft 365 - OneDrive data source on page 48](#).

# 11 Microsoft 365 - Outlook data source

This topic provides details on how to capture Microsoft 365 Outlook mailbox, calendars, contacts, and archive mailboxes with Collect.

## 11.1 Considerations

Note the following considerations about Microsoft 365 Outlook data sources:

- Relativity can collect standard mailboxes and archived mailboxes, but treats those mailboxes as two different data sources. Each type has specific permissions that you must include in the Azure application registration.
- Microsoft limits pre-collection filtering. Search does not mimic search capabilities in either Microsoft Purview or Relativity dtSearch. This can cause confusion with search operators and data being searched.
- The Outlook data source supports collection of linked attachments.
- You cannot collect private, one-on-one Teams chats with the Outlook data source. You can use the Teams data source to collect private, one-on-one Teams chats. For more information, see [Microsoft 365 - Teams data source on page 76](#).
- Authentication for collecting archived mailbox should use modern authentication. When using modern authentication, client ID and secret, the Exchange Web Services *full\_access\_as\_app* permission must be applied to the Azure app registration—TenantId, ClientId, ClientSecret. This permission is required for collecting online archived mailboxes.
- If you have a GCC high tenant, then you need to use the GCC High connector when setting up a data source. For more information, see Microsoft's documentation. Also, if in GCC only, you can use the same Microsoft 365 commercial tile.
- Government 365 collections include archive mailboxes.

## 11.2 Accessing Microsoft 365 Outlook

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. Relativity uses this ID and secret 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.

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

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 11.2.1 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.



Start with registering your app by following the steps below:

---

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

---

1. Open your [Azure Portal](#).
2. Navigate to the **App registrations** page.
3. Click **New Registration** to display the Register an application page.
4. Enter an application name in the **Name** field.
5. Select **Accounts in this organizational directory only** as the supported account type.
6. Click **Register**.

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

From the app's page, add permissions to the web API. To add correct permissions based on your selected Microsoft 365 data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source, but we recommend running through all steps for each data source.

---

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**.

To add permissions for Microsoft 365 online archived mailboxes:

1. In the left-hand navigation, select **Manage>Manifest**.
2. Locate the *requiredResourceAccess* property in the manifest, and add the following JSON script inside the *requiredResourceAccess* square brackets ([ ]):

```
{
  "resourceAppId": "00000002-0000-0ff1-ce00-000000000000",
  "resourceAccess": [
    {
      "id": "dc890d15-9560-4a4c-9b7f-a736ec74ec40",
      "type": "Role"
    }
  ]
}
```

3. Click **Save**.
4. Click **API Permissions**.
5. Click **Add a permission**.
6. Click **Microsoft Graph**.
7. Select **Application Permissions**.
8. Select the following options from the Application Permissions section:
  - Calendars.Read.
  - Contacts.Read.
  - Files.Read.All.
  - Mail.Read.
  - Sites.Read.All
  - User.Read.All
9. Click **Add permissions**.
10. Confirm that the **full\_access\_as\_app** permission is listed.

API / Permissions name	Type	Description	Admin consent requ...
▼ Microsoft Graph (7)			
Calendars.Read	Application	Read calendars in all mailboxes	Yes
Contacts.Read	Application	Read contacts in all mailboxes	Yes
Files.Read.All	Application	Read files in all site collections	Yes
Mail.Read	Application	Read mail in all mailboxes	Yes
Sites.Read.All	Application	Read items in all site collections	Yes
User.Read	Delegated	Sign in and read user profile	No
User.Read.All	Application	Read all users' full profiles	Yes
▼ Office 365 Exchange Online (1)			
full_access_as_app	Application	Use Exchange Web Services with full access to all mailboxes	Yes

11. Click **Grant Permission**.

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.

---

**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 the maximum time - **24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it 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 and there is no way to recover a secret.

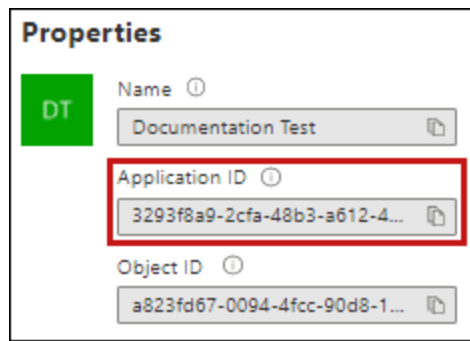
---

Provide your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.

## 11.3 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. Click the copy icon next to the Application ID.



## 11.4 Limiting application registration access to accounts

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

## 11.5 Revoking application access

You can revoke access to the application 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**. Collect no longer has access.

### 11.5.1 Revoking access via Powershell

You can use the `Remove-MsolServicePrincipal` script in Powershell to revoke access. 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
```

## 11.6 Creating the data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. You need to setup each data source once. You must create your data sources prior to setting up your custodian targets.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select a **Microsoft 365 Outlook** data source.

---

**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 required information in Settings. For more information, see [Fields settings below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Relativity saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. The data source will save when it is corrected and is verified.

Once you set up the data source, you will see the data source information on the Collect Admin page.

## 11.7 Fields settings

To connect Relativity to a Microsoft Outlook data source, you need to gather and enter the information for the following fields:

- **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 Outlook on page 56](#).

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. The parameters are saved when verified. If the parameters cannot be verified, you are presented with an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. The parameters will not be saved until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 11.7.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 11.8 Configuring the data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

### 11.8.1 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.

---

**Note:** This field is only required when you select a calendar source.

---

- **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**.

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.

### 11.8.2 Criteria

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. It also includes what can be searched within each data source. The criteria options change based on the Microsoft 365 Outlook data source.

#### 11.8.2.1 Microsoft 365 Outlook mailbox

Relativity collects all items in visible folders within Outlook's inbox and custom folders. Relativity collects hidden folders that exist under the Top of Information Store.

---

**Note:** The Microsoft 365 Outlook mailbox data source does not include soft deleted mailboxes, archived mailboxes, conversation history, notes, or tasks in the collections. To collect archived Outlook mailbox data, see [Microsoft 365 archive mailboxes on page 66](#).

---

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 page 66](#) and [Microsoft 365 Outlook calendar on page 65](#).

The following list is a list of file classes included in Outlook mailbox collections.

Collected file classes

- IPM.Activity
- IPM.Document

- IPM.OLE.Class
- IPM
- IPM.Post
- IPM.StickyNote
- IPM.Recall.Report
- IPM.Remote
- IPM.Report
- IPM.Resend
- IPM.Schedule
- IPM.TaskRequest

### Collect all emails with attachments regardless of criteria

This data source also includes the *Collect all emails with attachments regardless of criteria* toggle. If you are using keyword search criteria, we recommend enabling the toggle, regardless of keyword search results, because searching email attachments is not supported through the Microsoft Graph API. Use the *Collect all emails with attachments regardless of criteria* to collect all emails with attachments, including ones that do not match the selected keyword search criteria. Toggle on to collect emails that match the keyword search criteria, emails that match other criteria such as date range, and all emails with attachments regardless of keyword search criteria. For example, if you add a date range and keywords, Collect pulls emails with keywords in the body, emails within the specified date range, and emails with attachments within the date range. Toggle off to collect only emails that match the search criteria.

Other filter criteria still applies to the collection. For example, if you specify a date range along with keywords, Collect does not return any emails outside the date range. It returns the emails within the date range that are either responsive to the keywords or have an attachment.

### Outlook mailbox criteria

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

---

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 Outlook on page 56](#).

---

When using search criteria to filter for Outlook Mailbox, different operators can return different results. For example, the search criteria uses Search In and it does not 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. You should add keywords and phrases lower case only.

---

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

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

Criteria	Operators	Description	Example
Email BCC	Contains	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 CC	Contains	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 From	Equals, Contains	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 Received Date	Does Not Equal, Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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.
Email Sent Date	Does Not Equal, Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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 To	Contains	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.
Has Attachments	Does Not Equal,	When you use the Has Attachments property, the search	If you mark “True,” your results include all messages that include an attachment.



Criteria	Operators	Description	Example
	Equals	returns emails with or without attachments based on the True or False setting.	
Keyword Search - Email Body	Search In	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.	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	Search In	When you use the Keyword Search – Email Metadata property in a query, the search returns all messages which the Email To, Email From, Email CC, or Email BCC fields contain the text you’re searching for.	If you search kritter@example.com, your results include all messages that have the text in the Email To, Email From, Email CC, or Email BCC fields.
Parent Folder Name	Contains, Does Not Equal, Equals	When you use the Parent Folder Path property in a query, the search returns all messages in the folder that equal, does not equal, or contains the name entered. When using the Parent Folder Name criteria, listing a parent folder includes the child folders in the returned results.	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	Contains	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 does not 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.”

#### 11.8.2.2 Microsoft 365 Outlook calendar

The following table lists the filter criteria supported for calendar collections. You're required to enter the start date and end data criteria for calendar collections. 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.

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 Outlook on page 56](#).

You're required to enter the start and end dates when using an Microsoft 365 Outlook Calendar data source.

The following table lists the filter criteria supported for Outlook calendar collections.

Criteria	Operators	Description	Example
Start Date	Equals	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, Collect returns all calendar items on and between the two dates.
End Date	Equals	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, Collect returns all calendar items on and between the two dates.

#### 11.8.2.3 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 are not collected by Relativity.

---

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 Outlook on page 56](#).

---

#### 11.8.2.4 Microsoft 365 archive mailboxes

The following table lists the filter criteria supported for archive mailbox collections. Setting criteria for Microsoft 365 Email Archives is not required.

The Less Than operator is only supported when used in conjunction with Greater Than or Equals.

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

Criteria	Operators	Description	Example
Email Sent Date	Equals, Greater Than, Less Than	When you use the Email Sent Date property in a query, the search returns all messages that are greater than or equal/less than the date entered. Less than operator is only supported together with the greater than or equals.	If you search "Greater Than 1/1/2001," your results include all emails sent after January 1, 2001.

## 11.9 Collecting preserved files

When running a collection with Microsoft data sources, Relativity collects all available files including preserved files. You do not need to take extra steps to collect preserved files as they are automatically included in the collection. For more information on preserving data, see the Legal Hold guide.

When 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 you can collect. Relativity 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. Find preserved emails in the Recoverable Items folder. Find preserved files 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 [Microsoft 365 - Outlook data source on page 56](#).

## 11.10 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.

### 11.10.1 File names for Outlook email

Relativity collects Microsoft 365 Outlook emails as individual .eml files. Collect maintains the original folder structure of the mailbox on disk. Each .eml resides in its respective mailbox folder.

### 11.10.2 Files names on a preservation hold

A randomly generated and unique ID is appended to the original file name of the document if someone moves a deleted document to the Preservation Hold library, . For example, there is a document with the file name of *FY2017Budget.xlsx*. If someone deletes that document and then moves it to the Preservation Hold library, the file name of the document is modified. For example, the file name becomes something like *FY2017Budget\_DEAF727D-0478-4A7F-87DE-5487F033C81A2000-07-05T10-37-55.xlsx*.

When a document on a site that is 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 is 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](#).

### 11.10.3 Email considerations

Emails containing double byte characters and illegal characters will be HTML encoded to allow writing to the file system.

## 11.11 Troubleshooting

This table includes troubleshooting for Microsoft's archived mailboxes.

Error	Cause	Resolution
The remote server returned an error: (403).	Permissions have not been applied properly to the service account or application registration when using basic authentication or OAuth 2.0 respectively.	Apply the permission defined in the requirements section depending on your authentication method.
The specified folder could not be	The mailbox does not have an archive.	Remove the mailbox

Error	Cause	Resolution
found in the store.		from the list of targets.
Mailbox '...' doesn't have a valid license.	The owner of the mailbox does not have a valid license applied to their account.	Review the requirements section of this document and check if this user has a valid license. You can then choose to remove this user from the list of targets or apply a valid license.
The mailbox database is temporarily unavailable.	This error occurs if the mailbox database is not reachable. This can happen because the database is corrupt, in the process of being migrated, updated, or is offline for any other reason.	Wait an hour and retry the job to resolve this issue. If the issue persists, open a ticket with Microsoft.
The ExchangePrincipal object contains outdated information. The mailbox may have been moved recently.	The mailbox databases are separated in a way that causes inconsistent mailbox connections.	Retry the collection at a later time.
The request failed. Unable to connect to the remote server. A connection attempt failed because the connected party did not properly respond after a period of time, or established connection failed because connected host has failed to respond to microsoft_ip:443.	This is generally caused by a networking configuration either blocking access to the Exchange Online IP addresses— <a href="https://learn.microsoft.com/en-us/microsoft-365/enterprise/urls-and-ip-address-ranges?view=o365-worldwide">https://learn.microsoft.com/en-us/microsoft-365/enterprise/urls-and-ip-address-ranges?view=o365-worldwide</a> or Exchange Online blocking access to itself via an allow list.	Perform the necessary network, firewall, or allowed IP address configuration to allow the connector to access Exchange Online.

## 12 Microsoft 365 - SharePoint data source

This topic provides details on how to capture Microsoft 365 SharePoint with Collect.

### 12.1 Considerations

Note the following considerations about this data source:

- You can only collect parent level sites. You cannot collect sub-sites without collecting the parent level sites.
- Some Teams attachments may exist on the SharePoint sites. Teams chat data should live within the group mailbox of a Teams channel or the users mailbox for 1:1 chats. For more information, see [Microsoft 365 - Teams data source on page 76](#).

### 12.2 Accessing Microsoft 365 tenants

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. You will use this ID and secret to configure data sources in Collect and provides access to the Microsoft 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.

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

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

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

Register your application permissions through Azure Portal to access tenants.

Start with registering your app by following the steps below:

---

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

---

1. Open your [Azure Portal](#).
2. Navigate to the **App registrations** page.
3. Click **New Registration** to display the Register an application page.
4. Enter an application name in the **Name** field.
5. Select **Accounts in this organizational directory only** as the supported account type.
6. Click **Register**.

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

From the app's page, add permissions to the web API. To add correct permissions based on your selected Microsoft 365 data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source. We recommend running through all steps for each data source.

---

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:
  - Files.Read.All
  - Sites.Read.All
6. Click **Add permissions**.
7. Click **Grant Permission**.

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.

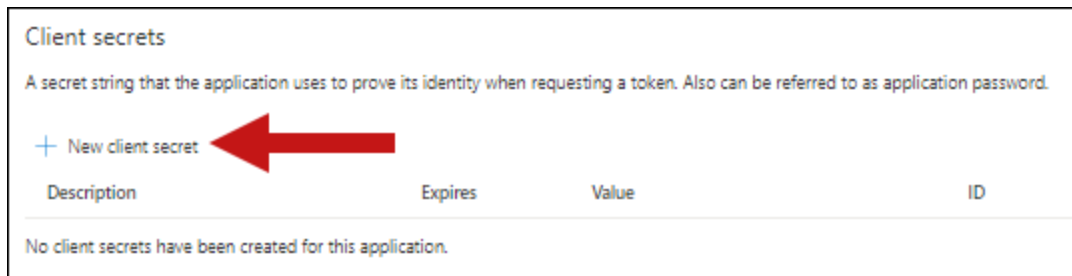
---

**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 that you granted all permissions.
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 to the maximum time - **24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it 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 forgotten or lost secret.

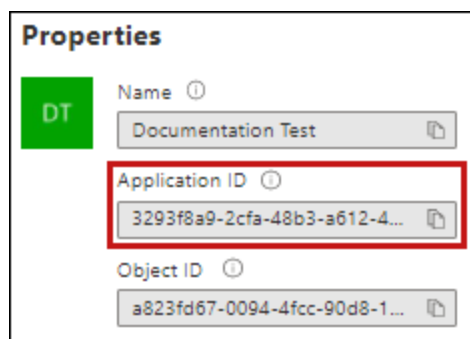
---

Give your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.

## 12.3 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. Click the copy icon next to the Application ID.



## 12.4 Limiting application registration access to accounts

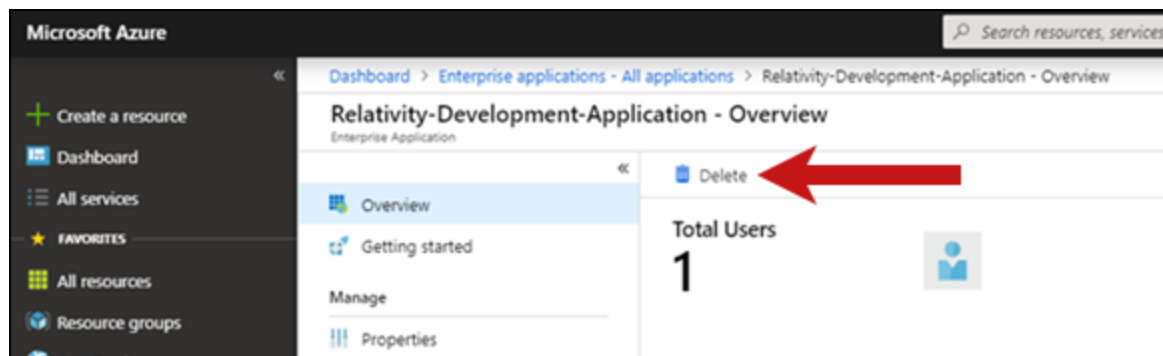
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 12.5 Revoking application access

Revoke the application 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**.



Collect no longer has access.

### 12.5.1 Revoking access via Powershell

Use the Remove-MsolServicePrincipal script to revoke access through Powershell. 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
```



## 12.6 Creating the data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. You only need to complete setup once for each data source. You must create your data sources before setting up your targets.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select **Microsoft 365 SharePoint**.

---

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

---

4. Enter the required information in Settings. For more information, see [Settings fields below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Relativity saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. Relativity will save the data source when you correct it and it's verified.

Once you complete the data source setup, you will see the data source information on the Collect Admin page.

### 12.6.1 Settings fields

To connect Relativity to a Microsoft SharePoint data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the Domain name of the Microsoft 365 tenant you intend to collect from.
- **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.

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. Relativity saves the parameters after verification. If the Relativity cannot verify the parameters, you will get an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. Relativity does not save the parameters until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 12.6.2 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console with two options:

- **Refresh sites**—click to make Relativity check your SharePoint for disconnected or new sites.
- **Validate Connection**—click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 12.7 Configure data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

### 12.7.1 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.

---

**Note:** This field is only required when you select a calendar source.

---

- **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**. 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.

#### 12.7.1.1 Criteria

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. It also includes what you can search within each data source.

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

---

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 69](#).

---

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

Criteria	Operators	Description	Example
Start Date	Equals	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, Collect returns all calendar items on and between the two dates.
End Date	Equals	When you use the End Date property	When you search a Start Date of

Criteria	Operators	Description	Example
		in a query, the search returns all calendar items the day of and before the entered date.	1/1/2001 and an End Date of 1/1/2020, Collect returns all calendar items on and between the two dates.

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

## 12.7.2 Collecting preserved files

When running a collection with Microsoft data sources, Relativity collects all available files, including preserved files. You do not need to take extra steps 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 you can collect. Relativity can collect this folder because the Removable Items folder is a 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. Microsoft stores preserved emails in the Recoverable Items folder and preserved files 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 [Microsoft 365 - SharePoint data source on page 69](#).

## 12.8 Troubleshooting

Job status	Error log	Cause	Resolution
InvalidLicense	Needs a valid license to access this API.	A target of the collection does not have the correct license.	See the section on Licenses for a list of valid license. You can find the list of unlicensed users in the errors.csv file included in the results of the collection.

## 13 Microsoft 365 - Teams data source

This topic provides details on how to capture Microsoft 365 Teams with Collect.

### 13.1 Considerations

Note the following considerations about this data source:

- Requires enhanced licensing - E5 licensing. For more information, see [Licensing requirements below](#).
- To enable an Azure application registration to use metered APIs and services in Microsoft Graph, you must associate the application with an Azure subscription. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation. For more information, see [Billing requirements on the next page](#).
- We recommend limiting the date range of the collection. Extended date ranges can increase collection time and potentially create issues.

### 13.2 Accessing Microsoft 365 tenants

Register the Collect application to access Microsoft 365. When registering the application, the Microsoft 365 administrator creates a Microsoft Application ID and secret. You will use the ID and secret to configure data sources in Collect and they provide 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.

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

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

#### 13.2.1 Licensing requirements

With the Teams Export API, Relativity meets compliance when collecting data. To use the API and collect Teams chats, users must meet one of the following licensing requirements. This licensing applies to individual custodian accounts.

- Office 365 E5/A5/G5
- Microsoft 365 E5/A5/G5
- Microsoft 365 E5/A5/F5/G5 Compliance and Microsoft 365 F5 Security & Compliance
- Microsoft 365 E5/A5/F5/G5 Information Protection and Governance

For more information, see relevant Microsoft documentation on the Microsoft site:

- <https://docs.microsoft.com/en-us/microsoftteams/export-teams-content>
- <https://docs.microsoft.com/en-us/graph/teams-licenses>
- <https://learn.microsoft.com/en-us/office365/servicedescriptions/microsoft-365-service-descriptions/microsoft-365-tenantlevel-services-licensing-guidance/microsoft-365-security-compliance-licensing-guidance#microsoft-graph-apis-for-teams-data-loss-prevention-dlp-and-for-teams-export>

### 13.2.2 Billing requirements

To enable an Azure application registration to use metered APIs and services in Microsoft Graph, you must associate the application with an Azure subscription. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation.

You must agree to Microsoft potentially billing you. Microsoft bills you if you exceed their seeded capacity, free quota, of API calls to the Teams Export API each month. For more information, see Microsoft's [Payment models and licensing requirements](#) documentation.

- Microsoft considers Relativity a *model=A* application. Microsoft restricts model=A to applications performing a security or compliance function, and requires a supported license. For more information, see Microsoft's [Teams licenses](#) documentation.
- Relativity uses the *Get messages across all chats for user* and *Get messages across all channels* APIs. Both have a seeded capacity of 1,600 messages per user per month per app. Each message over the seeded, free, capacity costs \$0.00075. Microsoft charges one message for requests returning an empty list. Seeded capacity is shared between chat and channel exports.
  - *Per user* does not mean a custodian. It means an E5 licensed user. For example, if you have 100 E5 licenses, you have a limit of 160,000 messages per month in seeded capacity.
  - After you reach the seeded capacity limit, according to Microsoft's \$0.00075 per notification charge, it takes about 1,333 messages to reach \$1. To calculate your exact numbers, use Microsoft's TeamsUserActivityUserDetail report. For more information, see Microsoft's [reportRoot: getTeamsUserActivityUserDetail](#) documentation.

### 13.2.3 Registering the Collect application and setting permissions

Register your application permissions through Azure Portal to access tenants.

---

**Note:** During the process, you must associate the application with an Azure subscription to enable an Azure application registration to use metered APIs and services in Microsoft Graph. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation.

---

Start with registering your app by following the steps below:

---

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

---

1. Open your [Azure Portal](#).
2. Navigate to the **App registrations** page.
3. Click **New Registration** to display the Register an application page.
4. Enter an application name in the **Name** field.

5. Select **Accounts in this organizational directory only** as the supported account type.
6. Click **Register**.

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

From the app's page, add permissions to the web API. To add correct permissions to your Microsoft 365 Teams data source, follow the steps below:

---

**Note:** Most steps and some permissions are the same for each data source, but we recommend running through all steps for each data source.

---

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:
  - User.Read.All
  - ChannelMessage.Read.All
  - Chat.Read.All
  - Files.Read.All
  - Group.Read.All
  - TeamsTab.Read.All
  - Team.ReadBasic.All
  - ChannelMember.Read.All
6. Click **Add permissions**.
7. Click **Grant Permission**.

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.

---

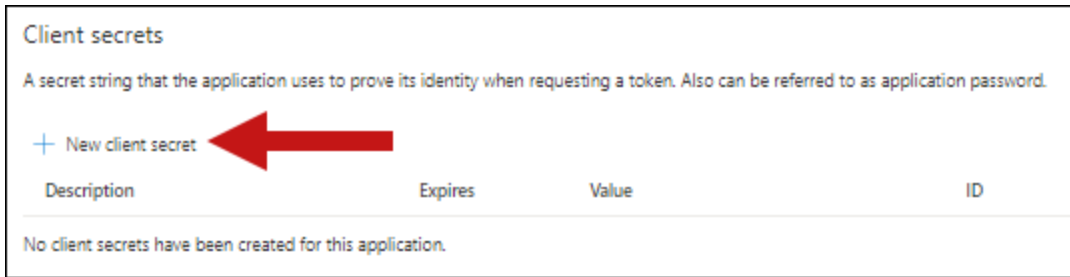
**Notes:** If you do not have the ability to grant Admin consent for application permissions, you'll need to find an Admin that can consent.

---

Once clicked, the window will show all permissions granted.

1. Verify that 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 to the maximum time—**24 months**.

---

**Notes:** After the time entered expires, the client secret expires. Once the client secret expires, you will need to create a new secret and update your Collect data sources.

---

7. Click **Add**.
8. Click on the clipboard and copy the secret value to the clipboard and paste it in your text document.
  - Give your Relativity Admin the Application ID and the Client Secret for setup of Collect. This application secret is also needed for setting up an Entra ID integration point.
  - 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 lost or forgotten secret.
9. Finally, you must associate the application with an Azure subscription to enable an Azure application registration to use metered APIs and services in Microsoft Graph. For more information, see Microsoft's Enable an application section in their [Metered API Setup](#) documentation.

---

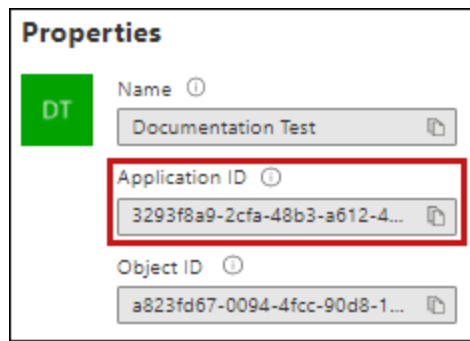
**Notes:** You cannot use Collect with a Teams data source without completing this step. For more information, see [Billing requirements on page 77](#).

---

## 13.3 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. Click the copy icon next to the Application ID.



## 13.4 Limiting Application Registration access to accounts

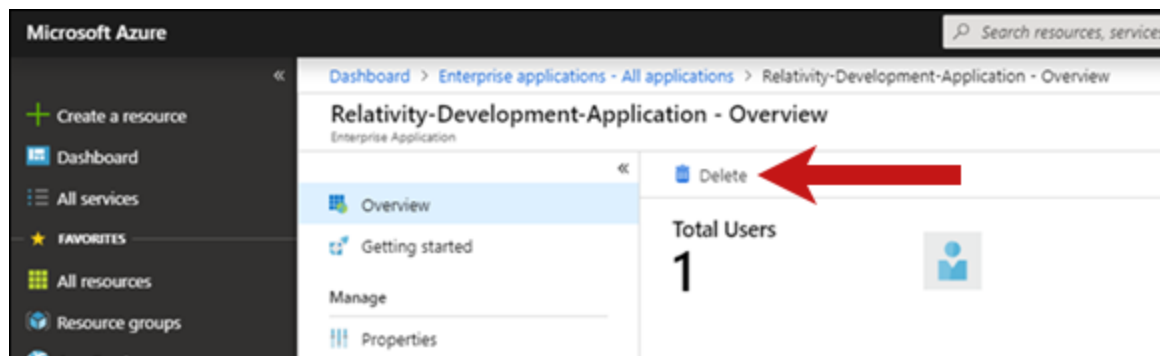
Limit the access of Collect to specific Microsoft user accounts and mailboxes by using the *New-ApplicationAccessPolicy Powershell cmdlet*. For more information, see Microsoft documentation.

## 13.5 Revoking Application Access

You can revoke the application 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**.



Collect no longer has access.

### 13.5.1 Revoking access in Powershell

Revoke access in Powershell 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
```

## 13.6 Creating the data source

The Collection Admin tab is where you create, edit, and remove data sources from your workspace. You only need to setup each data source once. You must create your data sources prior to setting up your custodian targets.

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select **Microsoft 365 Teams**.

---

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

---

4. Enter the required information in Settings. For more information, see [Settings fields below](#).
5. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the Microsoft 365 data source. If successful, Collect saves the data source. If the connection fails, a message appears in the UI indicating that the connection failed. If verification fails, verify that the values are correct. Collect will save the data source when it's corrected and verified.

Once you complete the data source setup, you'll see the data source information on the Collect Admin page.

## 13.7 Settings fields

To connect Relativity to a Microsoft Teams data source, you need to gather and enter the information for the following fields:

- **Domain**—enter the domain name of the Microsoft 365 tenant the collection is 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 76](#).

After clicking Save, Collect verifies the parameters and verifies them with Microsoft 365. Collect saves the parameters when verified. If the parameters cannot be verified, you will get an error message. If the connection failed, confirm the parameters, re-enter them, and click Save. The parameters will not save until there is a successful verification.

Depending on your RelativityOne license, commercial or government, and your Microsoft tenant, Microsoft 365 or Microsoft 365 Government, you will be able to collect from either Microsoft 365 or both Microsoft 365 and Microsoft 365 Government data sources. Commercial users can only collect from Microsoft 365 tenants. Government users can collect from Microsoft 365 and Government 365 tenants. These data sources act the same, but have different icons within Collect.

### 13.7.1 Data source details

Each data source details page includes an Action console. Each data source has different actions.

On the SharePoint data source page, you should see an Actions console. In the console, you can **Validate Connection**. Click to validate the client ID, certificate, and other credentials with Microsoft 365.

## 13.8 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.

---

#### Notes:

- The Microsoft 365 Teams data source collects the most recent version of each message.
  - Deleted messages are available to collect for 21 days from the time of deletion.
  - Task module content is not currently supported for collection.
- 

### 13.8.1 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.

---

**Note:** This field is only required when you select a calendar source.

---

- **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**. 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.

The following table lists the filter criteria supported for Microsoft Teams collections.

Relativity collects Microsoft Teams data in RSMF.

**Note:** You must register Relativity in Microsoft 365 before using this data source. For information on registering Relativity in Microsoft 365, see [Accessing Microsoft 365 tenants on page 76](#).

When using search criteria to filter for Teams, you must select start dates and end dates. All dates are in Coordinated Universal Time (UTC). The maximum date range supported is five years. For example, you can select Start Date 1/1/2016 and End Date 1/1/2021, but no further.

Criteria	Operators	Description	Example
Chat Type	Equals	When you use the Chat Type property in a query, the search returns all messages in either Private Channels, Private Chats, or Public Channels.	If you search a Chat Type with the Public Channels operator selected, Relativity collects only messages in public channels that the custodians are in.
End Date	Less Than or Equals	When you use the End Date property in a query, the search returns all messages the day of and before the entered date.	If you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all messages on and between the two dates.
Slice in Interval in Hours	Equals	When you use The Slice Interval in Hours property, the search returns all messages in a specific time range or defaults the slice interval to 24 hours.	If you search with a slice interval set to one hour and a conversation spans five hours, you will end up with five RSMFs after processing.
Start Date	Greater Than or Equals	When you use the Start Date property in a query, the search returns messages that exist the day of and after the entered date.	If you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Collect returns all messages on and between the two dates.

Included in the Microsoft 365 Teams criteria are two toggles:

- **Collect linked files external to M365**—enable the toggle to collect modern attachments, or files linked in Teams that are external to the Microsoft 365 tenant. You must opt in to confirm that you want to collect files outside of Microsoft 365.

**Note:** This option is only available for RelativityOne production environments. RelativityOne Government environments cannot collect external files.

- **Enable Dedupe**—enable the toggle to exclude cards contained in Teams chat messages. Due to the nature of how Microsoft provides card information, inclusion of cards prevents deduplication of RSMFs during processing. For more information, see Microsoft's documentation.

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

## 14 Refinitiv Eikon data source

This topic provides details on how to capture Refinitiv Eikon with Collect.

### 14.1 Creating the data source

In RelativityOne, use the following procedure to connect the Refinitiv Eikon data source to Collect:

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 **iManage** data source.
4. Enter the required information in the Settings fields. For more information, see [Settings fields below](#).
5. Click **Save**.

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

### 14.2 Settings fields

Find the information for these fields in the .json file:

- **Host**—enter the address of the Refinitiv Eikon host. For example, `sftp.refinitiveikon.com`.
- **Port**—enter the SFTP port.
- **Path**—enter the folder address of the stored files.
- **Username**—enter the username to your organization's Refinitiv Eikon site.
- **Password**—enter the password to your organization's Refinitiv Eikon site.

### 14.3 Configuring the 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.

Add search 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 you select a calendar source.

---

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

The following table lists the filter criteria supported for Refinitiv Eikon collections. Setting criteria for Refinitiv Eikon is not required.

Relativity collects Refinitiv Eikon chat data Relativity's short message format (RSMF).

Criteria	Operators	Description	Example
Start Date	Greater Than or Equals	When you use the Start Date property in a query, the search returns chats that exist the day of and after the entered date.	When you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Relativity collects all calendar items on and between the two dates.
End Date	Less Than or Equals	When you use the End Date property in a query, the search returns all chats the day of and before the entered date.	When you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, Relativity collects all calendar items on and between the two dates.

## 15 Slack data source

This topic provides details on how to capture Slack with Collect.

### 15.1 Considerations

Review the list of considerations before starting your collection:

- We recommend limiting the volume and number of custodians per job. Limiting both will reduce the collection time and reduce the chance of errors.
- Slack data is collected in grouped collections and will have a different data count than the other standard collections. Grouped collections are a set of RSMFs containing all the chats for the custodians assigned to the collection. Since the data is grouped together, the expected behavior for custodian targets to have the same count.  
Essentially if you are collecting two or more custodian targets in this scenario, the total number of items for each of them will match because the number is counting the sum of all the chats for all of them combined.
- We recommend limiting the date range of the collection. Extended date ranges can increase collection time and potentially create issues.
- We do not recommend collecting each custodian separately, with one collection collecting one custodian target. This creates duplicate chats in cases where the custodians have been chatting with each other. This makes the collection harder to manage and account for in review and would take much longer.

### 15.2 Slack application setup

Before using the Slack data source in Collect, you must create and authorize Collect as an application in Slack.

There are specific steps to connect Slack to Relativity when creating the data source. To set up the Slack data source, you will need to enable API access with Slack and then complete the data source settings in Relativity.

For more information, see [Relativity Collect: Collecting from a Slack Enterprise Data Source](#) training video.

Your Slack organization must be on:

- Enterprise Grid plan. The Collect application requires the Enterprise Grid plan that provides access to the Discovery API.
- GovSlack. You will need a Slack FedRamp account. For more information, see Slack's documentation.

Before Slack can be set up as a Collect data source, the Slack organization owner needs to email [exports@slack.com](mailto:exports@slack.com) to gain API access, see the details below.

## Enabling an Organization

In order for a customer's organizations to access the Discovery API, an org Owner needs to email [exports@slack.com](mailto:exports@slack.com) and say they'd like to "enable the Discovery APIs for Organization [XYZ]". We will promptly enable access after verifying the email address matches an Owner of the org.

Once Slack confirms your Discovery APIs are enabled for your organization, proceed to set up your Slack data source in Relativity.

## 15.3 Creating the data source

After confirming that your Discover APIs are enabled, complete the set up process in Relativity.

**Note:** You set up data source connections at a workspace level. You only need to set up a given data source connection once in a given workspace. For example, if you have three different workspaces to run collections in, you would need to set up the Slack data source connection three times, once for each workspace. If all collections are from just one workspace, then you only need to set up the data source once.

In RelativityOne, use the following procedure to connect the Slack data source to Collect:

1. Click the **New Collection Source Instance** button.
2. Enter in a unique name for the data source.
3. Select the **Slack** data source. Either Slack commercial or Slack government.
4. Click **Install Application**.

After clicking the **Install Application**, a window from Slack appears. You must disable pop-ups in your browser to see the window.

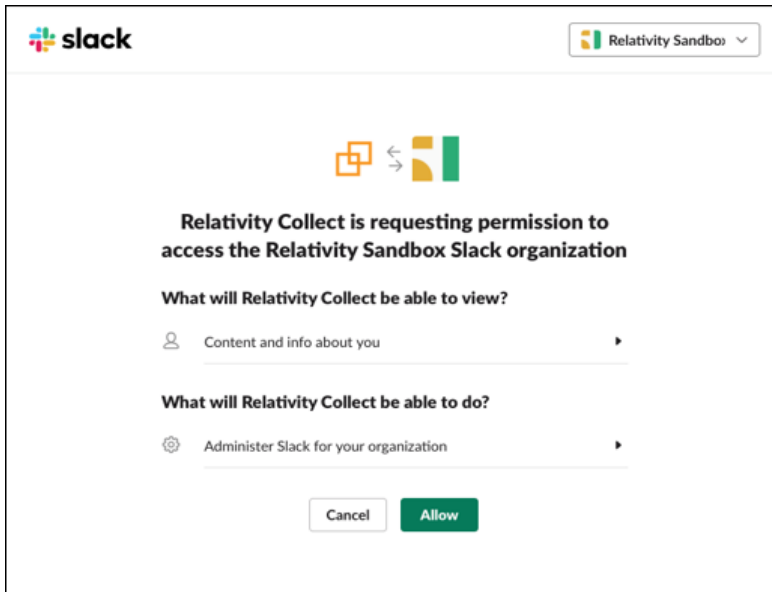
### Notes:

If you already logged in, you will see a window with an Allow button to authorize the Collect application. If you did not log in, you must log in as the organization owner. Make sure you enter the organization URL when signing in.

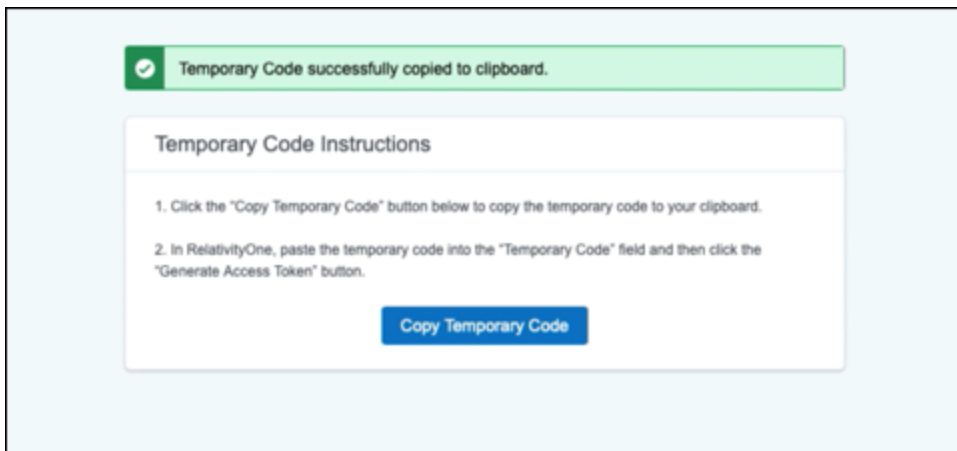
If you logged into multiple organizations, make sure to select the correct one in the drop-down menu in the top-right corner. If you do not know your organization URL, you can find it in the Overview section of **About This Workspace** in Slack.

Add an organization to the drop-down menu by opening a new window outside of this workflow and sign into another organization. Another option is to log out of the current organization before clicking Install Application and logging in when requested.

5. In the window, click **Allow** button.



6. After clicking **Allow** you will navigate in the same window to a page where you will copy a temporary token.
7. Click **Copy Temporary Code** to copy to your clipboard.



Once copied, you can close that window and return back to RelativityOne.

8. In Collect, paste the code in the **Temporary Code** field.
9. Click **Generate Access Token**.

The access token will be generated and populated in the Access Token field below.

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**Notes:** Paste this token in the Access Token field in any other additional workspaces you want to setup.

---

10. Click **Save**.



## 15.4 Settings fields

To connect Relativity to the Slack data source, you need to gather and enter the information for the following fields. Setting up Slack includes steps outside of Collect. To get the steps to gather the temporary code and access token, see [Slack application setup on page 86](#).

- **Temporary Code**—enter the code provided by Slack after installing application. The Generate Slack Access token section provides steps to retrieve the Temporary Code and Access Token.
- **Access Token**—enter the application token retrieved after authorizing Relativity as an application in Slack. For more information, see [Slack documentation](#).

## 15.5 Configuring the 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.

Add search 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 you select a calendar source.

---

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

The following table lists the filter criteria supported for Slack collections. Slack collections require you to enter the start date and end data criteria. Slack puts a limit on how far back you can run a collection. Your organization's Slack enterprise retention policy sets this time period. For more information, see [Slack documentation](#).

---

**Note:** You need to register Relativity in Slack before using this data source. For information on registering Relativity in Slack, see [Slack documentation](#).

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When using the Slack data source:

- You can collect Archived Slack channels. You cannot collect deleted Slack channels.
- Relativity collects Slack data in Relativity Short Message Format (RSMF).
- RSMF has a 2 GB processing limit. For more information, see the RSMF guide.

Criteria Field	Operators	Description	Example
Channel Name	Equals	When you use the Channel Name property, the search returns	If you use the Channel Name property in a query, the search returns all messages that the channel name equals the text you're searching for. In

Criteria Field	Operators	Description	Example
		all message within the channels that equals the search word or phrase in the channel's name.	other words, the query does not return only those messages from channels that have an exact match. For example, if you search for subject "finance_team," your results include messages from channels like "finance_team_project."
Conversation Type	Equals	When you use the Conversation Type property in a query, the search returns all messages that were either in a direct message or group message.	If you use the Group Message conversation type in a query, the search results returns messages that exist in group messages. Direct, one-on-one messages will not be included in the collection.
End Date	Less Than Or Equals	When you use the End Date property in a query, the search returns all messages the day of and before the entered date.	If you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, the search returns all messages on and between the two dates.  We recommend limiting the date range to maintain a high performance level and a lower collection time.
Slice Interval in Hours	Equals	When you use The Slice Interval in Hours property, the search returns all messages in a specific time range or defaults the slice interval to 24 hours.	If you search with a slice interval set to one hour and a conversation spans five hours, you will end up with five RSMFs after processing.
Start Date	Greater Than Or Equals	When you use the Start Date property in a query, the search returns messages that exist the day of and after the entered date.	If you search a Start Date of 1/1/2001 and an End Date of 1/1/2020, the search returns all messages on and between the two dates.  We recommend limiting the date range to maintain a high performance level and a lower collection time.
Workspace Name	Equals	When you use the Workspace Name property, the search returns all messages in all channels within the workspace that equals the search word or phrase in the workspace's name	If you use the Workspace Name property in a query, the search returns all messages that the instance name equals the text you're searching for. For example, if you search for subject "Company A," your results include messages from that instance.

If a Slack channel with same name exists across multiple Slack workspaces within a collection, Collect will collect all content in both channels in both workspaces.

You can collect Direct Messages, Group Messages, or both Direct and Group messages. Do not select a conversation type if you want to collect all messages.

The Slice Interval in Hours criteria defaults the slice interval to 24 hours. This means Collect will create one file for the conversations within that 24-hour interval. If the conversation goes beyond 24 hours, a second Relativity Short Message File (RSMF) will be created. Another example is if you have a slice interval set to one hour and a conversation spans five hours, you will end up with five RSMFs after processing.

Collections include deleted messages. Relativity displays deleted messages on the day the user deleted the message, not the day the user sent the message. Also, Relativity collects only the message when a deleted message includes an attachment. Files sent as attachments without a message and then deleted, the metadata is available for 24 hours, but the file is not collected. When Relativity collects deleted messages in threads, Relativity displays the messages outside of the thread in the RSMF.

Relativity collects conversations in public or private channels for each day in the date range regardless if the custodian participated in that channel on a given day.

When collecting multiple custodians' data, and each custodian is in the same channel, Relativity collects the channel once.

## 16 X1 data source

This topic provides details on how to capture X1 data sources with Collect.

### 16.1 Considerations

X1 data sources require separate licensing, configuration, and training through a third party. For example, X-1. For more information, see [X1's licensing documentation](#).

### 16.2 Creating the data source

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 **X1 Emails** or **X1 Files** the type of data source:
4. Enter the required information in the Settings fields. For more information, see [Settings fields below](#).
5. Click **Save**.

Once you complete the data source setup, you will see the data source information on the Collect Admin page.

### 16.3 Settings fields

To connect Relativity to a X1 data source, you need to gather and enter the information for the following fields:

- **X1 Enterprise Manager Endpoint URL**—enter the endpoint URL of 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 of 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. Collect only searches the specified location.
- **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.

## 16.4 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.

### 16.4.1 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:** Collect requires this field after you select a calendar source.

---

- **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**. 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.

Filter a data source's data that you want to collect by adding criteria. This section covers the different criteria for each data source. This section also includes what you can search within each data source. The criteria options change based on the selected data source.

#### 16.4.1.1 X1 emails

The following table lists the filter criteria supported for X1 Emails collections. Setting criteria for X1 emails is not required.

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**Note:** You must register Relativity in X1 before using this data source. For information on registering Relativity in X1, see X1 documentation.

---

Criteria Field	Operators	Description	Example
Attachment Name	Contains, Does Not Equal, Equals	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 attachment names in X1 email data sources.
BCC	Contains, Does Not Equal, Equals	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	Contains, Does Not Equal, Equals	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	Contains	When you use the Email Body property in a query, the search returns all messages email message contains the text you're searching for.	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	Contains, Does Not Equal, Equals	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	Equals	Searches across all data sources simultaneously with general searching options. For more information on X1 searching, see <a href="#">Basic Search Commands</a> and <a href="#">Advanced Search Command</a> .	If you search for "quarterly financial records," your search results will include the searched phrase from all X1 email data sources.
From	Contains, Does Not Equal, Equals	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	Equals	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 attachment.
Indexing Status	Contains, Does Not	When you use the Indexing	If you search Does Not Equal "Error," your search results will include

Criteria Field	Operators	Description	Example
	Equal, Equals	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 <a href="#">X1 documentation</a>	all files without the Error index status.
Received Date	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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	Contains, Does Not Equal, Equals	.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	Contains, Does Not Equal, Equals	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.

#### 16.4.1.2 X1 files

The following table lists the filter criteria supported for X1 Files collections. Setting criteria for X1 files is not required.

**Note:** You must register Relativity in X1 before using this data source. For information on registering Relativity in X1, see X1 documentation.

Criteria Field	Operators	Description	Example
Date Created	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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	Equals, Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	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	Contains, Does Not Equal, Equals	When you use the Document Type property in a query, the search returns all documents that contain, equal, or does not equal what you entered.	If you search "spreadsheet," your results include Excel files.
Extension	Contains, Does Not Equal, Equals	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	Equals	Searches across all data sources simultaneously with general searching options. For more information on X1 searching, see <a href="#">Basic Search Commands</a> and <a href="#">Advanced Search Command</a> .	If you search for "quarterly financial records," your search results will include the searched phrase from all X1 file data sources.
Indexing Status	Contains, Does Not Equal, Equals	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 <a href="#">X1 documentation</a> .	If you search Does Not Equal "Error," your search results will include all files without the Error index status.
Name	Contains, Does Not Equal, Equals	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



Criteria Field	Operators	Description	Example
	Equals		files with that text in the file-name.
Path	Contains, Does Not Equal, Equals	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.

## 17 Collection

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 110](#).

### 17.1 Creating a collection

Before you begin creating a collection, make sure to create a matter. For more information, see [Matters on page 12](#).

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 [Collect console on page 107](#).

For information on running concurrent Microsoft 365 collection jobs, see [Accessing Microsoft 365 tenants on page 48](#).

### 17.2 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

- **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 wrong or missing, an error message displays and you cannot move to the next step.

#### 17.2.1 Collection Details

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

- **Name**—the name of the collection.

---

**Note:** Enter a name using alphanumeric characters only. You cannot use special characters, such as periods, commas, and em dashes. Special characters will cause an error.

---

- **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 12](#).

- **Include Web I/E Locations**—toggle this option on if you want to see all of the \WebImportExport file folders listed within the \ProcessingSource folder or toggle it off if you do not want to see them.
- **Job Number**—lists a number assigned to the job for reporting purposes.
- **Processing Source Location**—the file repository for collected data to be stored for future processing of documents or for storing collected data.

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

---

- **ZIP Collected Files**—toggle on to compress all collected data into ZIP64 formatted containers. For more information, see [Collect Store on page 116](#). Relativity can compress Microsoft 365, Slack, and X1 data into zip folders.
  - Selecting **Yes** on the Collect Files in ZIP field adds your collected data into containers and puts it into a password protected compressed folder. The compressed folders are 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.
  - You can secure these compressed folders with a password. You can enter a password that you, or another user, needs to enter to open the compressed folder. Relativity stores these passwords in the password bank. You can retrieve them there at a later time.
  - To export your collected data, use the RelativityOne Staging Explorer.
  - Google compresses the data on their end and they exclude Google data from the ZIP64 formatted containers.
  - iManage does not support adding data to ZIP64 formatted containers.
- **Zip Password**—enter a password that is required by anyone attempting to decompress the ZIP64 container files.

---

**Note:** If you have Processing 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.

---

- **Enable Auto-Processing**—toggle on to enable auto-processing. If enabled, select the workspace and profile. Relativity processes all data in a completed collection, or completed with errors collection, after a collection finishes.
- **Select Workspace**—select a workspace within your instance to select a Processing profile to use when creating a processing job.
- **Select a Processing Profile**—select a processing profile available in the drop-down menu. The available profiles are from the selected workspace.
- **Select a document prefix option**—select *Use Entity Document Number Prefix* or *Use Processing Profile Document Number Prefix* to apply to each file in the processing set once it's published to a workspace.
- **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 on page 17](#).

## 17.2.2 Data source

Configure the data sources chosen in the Collection Details step. If you select multiple data sources in the first step, you will 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.

### 17.2.2.1 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 you select a calendar source.

---

- **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**. You can 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.

### 17.2.3 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 checkbox next to a custodian. Collect supports up to 30 custodians per collection project. If you need more than 30 custodians, you need to create another collection project.

---

**Note:** 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 listed custodians with targets in the custodian picker.

---

### 17.2.4 Non-custodial

---

**Note:** This section only applies when SharePoint is selected as the data source.

---

Select non-custodial data sources to complete this step. Non-custodial data means you will select the sites that you want to collect. Selecting custodians is not required.

With non-custodial data, you can collect from parent-level sites only. All sub-sites under a parent site are automatically collected.

To select non-custodial data:

1. Click one or more data sources in the **Select Sources** column.
2. With one of the data sources highlighted, click the check boxes next to the sites you want to collect.
3. (Optional) Toggle on the **Show selected only** option in the SharePoint Sites table to only display the sites that have been selected for collection. The selected sites will display in a concise list at the top

for easy review and confirmation before proceeding to the final Summary step.

4. Click **Next**.

## 17.2.5 Collection Summary

Complete the creation of the collection by reviewing all steps, custodians, data sources, and targets, before finalizing. If Google Workspace Microsoft 365 Slack X1 custodian targets were not created before started the project, click **Generate Targets**. Clicking Generate Targets will check to see if targets exist for the custodians you have 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.

### 17.2.5.1 Targets

In the Targets section, you will see a number next a custodian's name. The number listed is the number of custodian targets found in the associated data source. A zero, 0, means Collect did not find any custodian targets with that email address in that data source. A one means Collect found a single custodian target associated with the email address within the data source. Any number greater than one means that Collect found multiple custodian targets with that email address within the data source.

If there is no color highlighting the number, it means Collect already found and generated the custodian target. If there is a green highlight, Collect autogenerated the custodian target. If there is a red highlight, Collect could not autogenerated this custodian target. If red, you can still manually generate the custodian target. For more information, see [Creating a custodian target on page 15](#).

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 preview and run the collection from the [Collection Summary above](#).

### 17.2.5.2 Non-custodian targets

---

**Note:** This section only applies when SharePoint is selected as the data source.

---

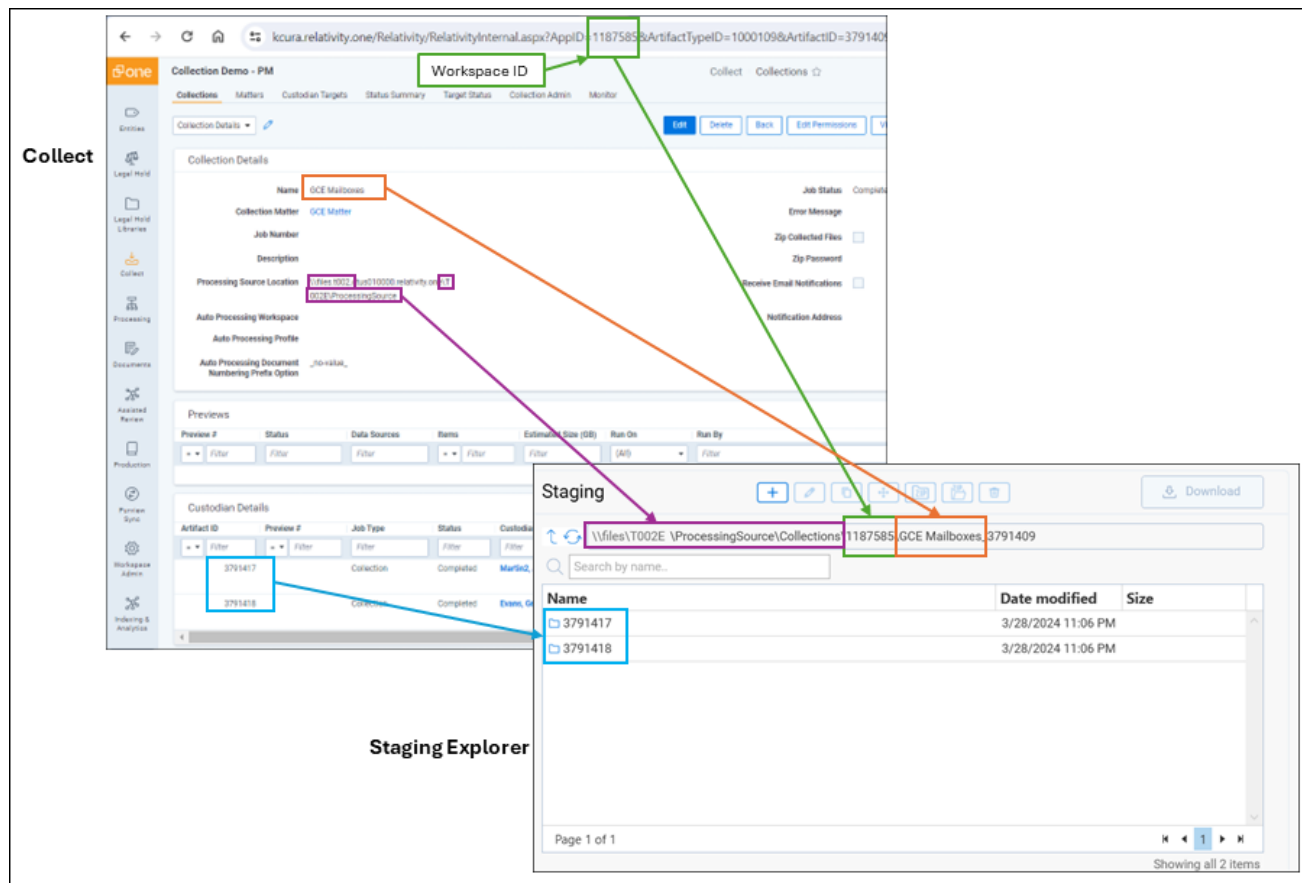
In the Non-Custodian Targets section, you will see the target, target identifier, and the status.

- **Target**—the name you gave when creating the data source.
- **Target Identifier**—the URL of the SharePoint site.
- **Status**—a message telling you if the target is valid or invalid. If invalid, navigate to the data source details page and click the **Refresh Sites** button.

## 17.3 Identifying Collection data in Staging Explorer

This section helps to identify the components of the folder information within the Staging pane of the Staging Explorer as it relates to the Collections setup fields.

Use the sample screen below as a general guide for each data source type.



Here is a breakdown of the folder components within the Staging pane of the Staging Explorer:

**\\files\\<T####>\\ProcessingSource\\Collections\\<WorkspaceID>\\<CollectionName>\_<ArtifactID>**

- The Processing Source Location from the Collections page becomes the file location for the data in Staging Explorer. It contains a sub-folder for Collections to house the Collection data. Using the above example, it would be:

**\\files\\<T####>\\ProcessingSource\\Collections**

- The Workspace ID folder in the Staging pane corresponds to the Workspace ID number listed after the "AppID=" in the URL. For example, 1187585 would be the Workspace ID from this URL: kcura.relativity.one/Relativity/RelativityInternal.aspx?AppID=**1187585**&ArtifactTypeID=.....

**\\files\\<T####>\\ProcessingSource\\Collections\\1187585**

- The Name of the Collection from the Collections page becomes the folder name within the Workspace ID folder. Using the above example, it would be:

**\\files\\<T####>\\ProcessingSource\\Collections\\1187585\\<CollectionsName>**

- The Artifact ID from the Collections page under Custodian Details is the data source ID. Using the above example, it would be:

```
\\files\<T####>\ProcessingSource\Collections\<WorkspaceID>\<CollectionName>_<ArtifactID>
```

In the case of grouped collections, such as Teams and Slack, there will be a folder within the Artifact ID folder corresponding to the data source type. Using Teams as an example, the file structure will be:

```
\\files\<T####>\ProcessingSource\Collections\<WorkspaceID>\<CollectionName>_<ArtifactID>\Teams
```



## 18 Viewing or editing collection data

You can view and edit collection details. You can also use the Collect console to start and stop collections and view reports.

### 18.1 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 [Viewing or editing collection data above](#).

---

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

---

- **Collection Details**—the information that you entered or selected when you created the collection:
  - **Name**—lists the name given to the collection.
  - **Collection Matter**—the matter used in the collection.
  - **Include Web I/E Locations**—toggled on you will see all of the \WebImportExport file folders listed within the \ProcessingSource folder or toggled off you will not.
  - **Job Number**—the number assigned to the job for reporting purposes.
  - **Description**—the description of the collection used for reporting purposes.
  - **Processing Source Location**—the file repository that collected data is stored for future processing of documents or for storing collected data.
  - **Auto Processing Workspace**—the processing workspace if you toggled the field on.
  - **Auto Processing Profile**—the processing profile if you toggled the field on.
  - **Auto Processing Document Numbering Prefix Option**—the prefix option if you selected one.
  - **Job Status**—status of the collection. Statuses are New, Not Started, Started, Completed, Error, and Completed with Errors.
  - **Error Message**—the message if collection job did not complete due to errors.
  - **Zip Collected Files**—if you selected to zip collected files.
  - **Zip Password**—the password that everyone needs to decompress the ZIP64 container files.
  - **Receive Email Notifications**—if you toggled on to send or receive collection job status emails.
  - **Notification Address**—the email address of the person that will receive collection job statuses.
- **Collection Console**—displays buttons that you can use to perform the following tasks. See [Collect console on page 107](#).

- **Data Sources**—lists all the collection activities associated with this collection.
  - **Custodian**—the custodian associated with the collection.
  - **Source Instance**—the name of the data source associated with the collection.
  - **Data Type Name**—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 111](#).
    - **Failed**—the collection failed. For more information, see [Graph Error Codes on page 111](#).
  - **Error**—lists the error message if the status is Failed.
  - **Collected Items**—the number of files collected from the target without error. If nothing is collected, a 0 is listed.
  - **Collected Item Total**—the number of files that there are to collect without errors. If nothing is collected, a 0 is listed.
  - **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 the associated metadata for each collected item as well. If no results, the file is empty. For more information, see [Viewing or editing collection data on the previous page](#).

---

**Notes:** Google Workspace results download as a .xml file that you can convert into a .csv file using a third-party tool.

---

- **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 [Viewing or editing collection data on the previous page](#).

---

**Notes:** Google Workspace results download as a .xml file that you can convert into a .csv file using a third-party tool.

---

- **Previews**—the status and estimated number of items and size of collection. This is available after starting a preview. For more information, see [Preview on the next page](#).
- **Custodian Details**—the status of the custodian and the source instance. This card also includes the filter criteria, items, size, and errors.

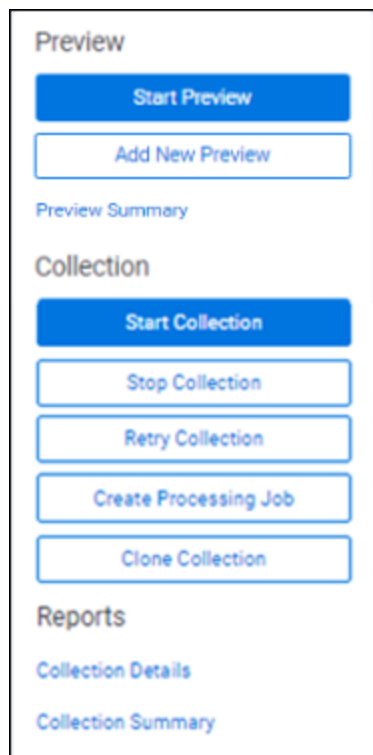
## 18.2 Viewing collected data

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.

There is a difference between viewing grouped and individual collections data. To view grouped collections data, for sources like Bloomberg Chat, Google Chat, Slack, Teams, click the **Get Results** link to view your collection data. Although the Data Sources table will show N/A in the Collected Items and Collected Item Total columns, the collected data is still available in the download. These columns show N/A because more than one set of custodian data is included in the collection.

## 18.3 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.



### 18.3.1 Preview

After setting up your collection job, you can preview the job. This is an inventory phase without running a full collection. You can see the estimated number of discovered items and collection size for each custodian target. These preview options help you decide to move forward or adjust your collection job.

---

**Notes:** Only available for Microsoft 365 Outlook mailboxes, calendars, contacts, and OneDrive. For more information, see [Microsoft 365 - Outlook data source on page 56](#) and [Microsoft 365 - OneDrive data source on page 48](#).

Inactive mailboxes are not included in preview.

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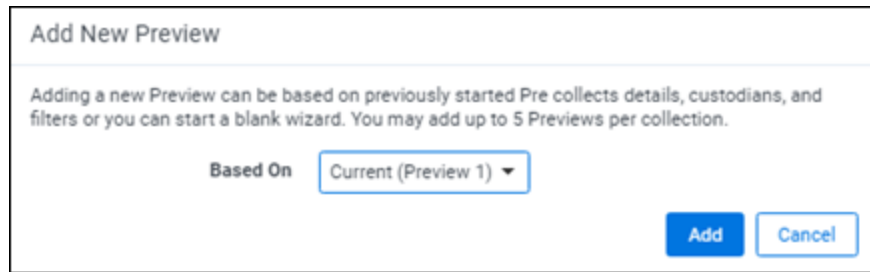
#### 18.3.1.1 Start Preview

Click the **Start Preview** button to gain insight into the number of items and size of the collection as the collection is currently set up.

From here, you can start your collection or add a new preview.

#### 18.3.1.2 Add New Preview

Click the **Add New Preview** button to adjust your collection job setup. In the Add New Preview modal, you can add a new preview based on previously started collect details or a blank wizard. You can add up to five previews.

A modal dialog titled "Add New Preview". Inside, there is a text block stating: "Adding a new Preview can be based on previously started Pre collects details, custodians, and filters or you can start a blank wizard. You may add up to 5 Previews per collection." Below this text is a label "Based On" followed by a dropdown menu currently showing "Current (Preview 1)". At the bottom right of the modal are two buttons: "Add" and "Cancel".

Selecting the **Blank Wizard** option takes you back to the Collection Details step. You then need to complete the collection wizard with a new setup.

From here, you can start your collection.

### 18.3.2 Collection

Once you decide to move forward with your collection, you will use this section of the console to start, stop, and adjust your collection job.

#### 18.3.2.1 Start Collection

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

#### 18.3.2.2 Stop Collection

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

#### 18.3.2.3 Retry Collection

The Retry Collection button is only available when a collect job does not complete because of errors. Click **Retry Collection** to start another collect job that only retries the targets that have failed. You cannot retry targets that completed successfully.

#### 18.3.2.4 Create Processing Job

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

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

- **Select a workspace**—select a workspace within your instance to select a Processing profile to use when creating a processing job.

- **Select a Processing Profile**—select a processing profile available in the drop-down menu. The available profiles are from the selected workspace.
- **Select a Document Numbering Prefix Option**—select *Use Processing Profile Document Number Prefix* or *Use Processing Profile Document Number Prefix* to apply to each file in the processing set once it is published to a workspace.
- **Clone Profile**—toggle off to use the selected processing profile. Toggle on to clone the selected processing profile and use the clone profile in conjunction with the created processing set.

**Submit Collection to Processing?**

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

Select a Workspace: Documentation ▼

Select a Processing Profile: Default ▼

Select a Document Numbering Prefix Option: Use Processing Profile Document Number Prefix ▼

Clone Profile: ☐

Submit Collection Cancel

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

#### 18.3.2.5 Clone Collection

Click **Clone Collection** to duplicate the open collect job. You can clone any collect job that has a status other than New.

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 you can find it in the Collections list under the same name with "Cloned - YYYY-MM-DD HH.MM.SS" amended 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 zero. The cloned collect job also generates the new targets.

#### 18.3.2.6 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 [Reports on the next page](#).

## 19 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.

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**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.

---

### 19.1 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.

#### 19.1.1 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 in the summary report table. If no filter criteria was specified for the job, the report lists a "No Filter Criteria Applied" message.

Group-type data sources are also included in the list of data sources. This section is at the beginning of the report. For example, if you collect from Outlook calendars, Outlook mailboxes, and Slack, all collection summaries are included in the report.

The short message grouped collections lists the custodians involved in the collect, along with the data sources. The top of the report includes the custodian list. This section's title is "Short Message Grouped Collections." The report table includes the data source, target status, the number of items collected, and the collection size in gigabytes.

#### 19.1.2 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 Entra ID file share. It is included in the collection output.

#### 19.1.3 Results report

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

The Results report is a CSV file download of the results collected from Bloomberg, Box, iManage, Microsoft, Refinitiv Ikon, Slack, or X1 targets.

The Results report is an XML file download of the results collected from a Google target.

#### 19.1.3.1 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.

### 19.1.4 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.

#### 19.1.4.1 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.

#### 19.1.4.2 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](#).

#### 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 48](#).

#### 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](#).

## 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](#).

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](#).
- **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](#).

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](#).

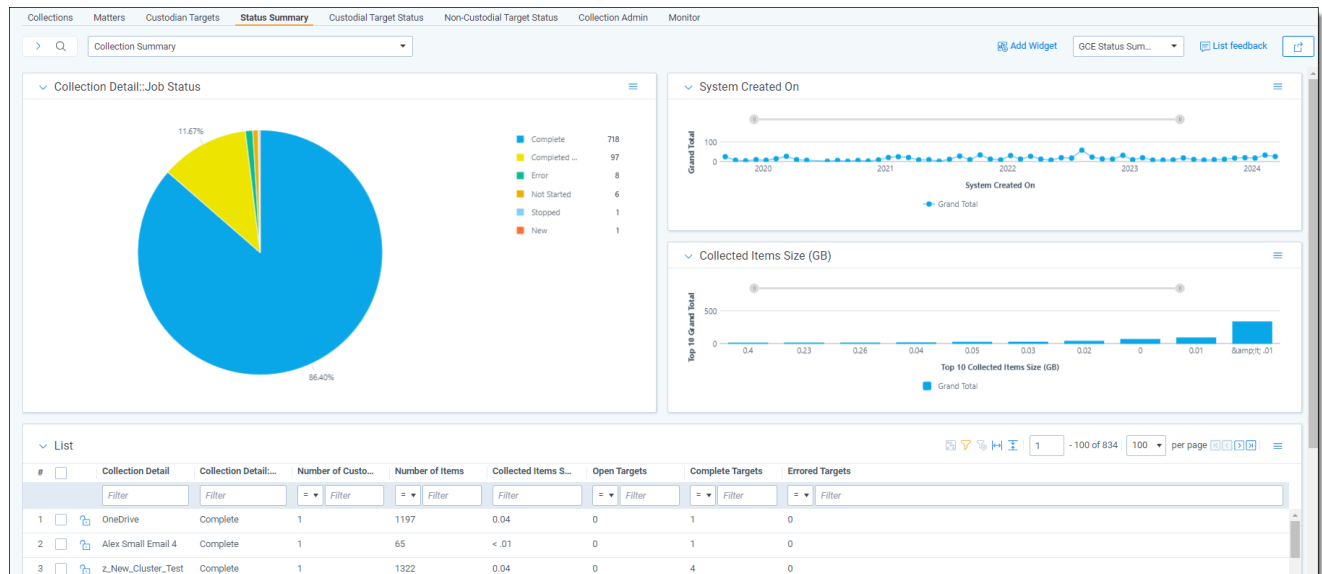


## 20 Status Summary

In Collect, you manage multiple collect jobs and you need to track all of them.

### 20.1 Job status

The job status dashboard to see the statuses of collection jobs. You can drill into each job 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.



### 20.2 Reviewing job statuses

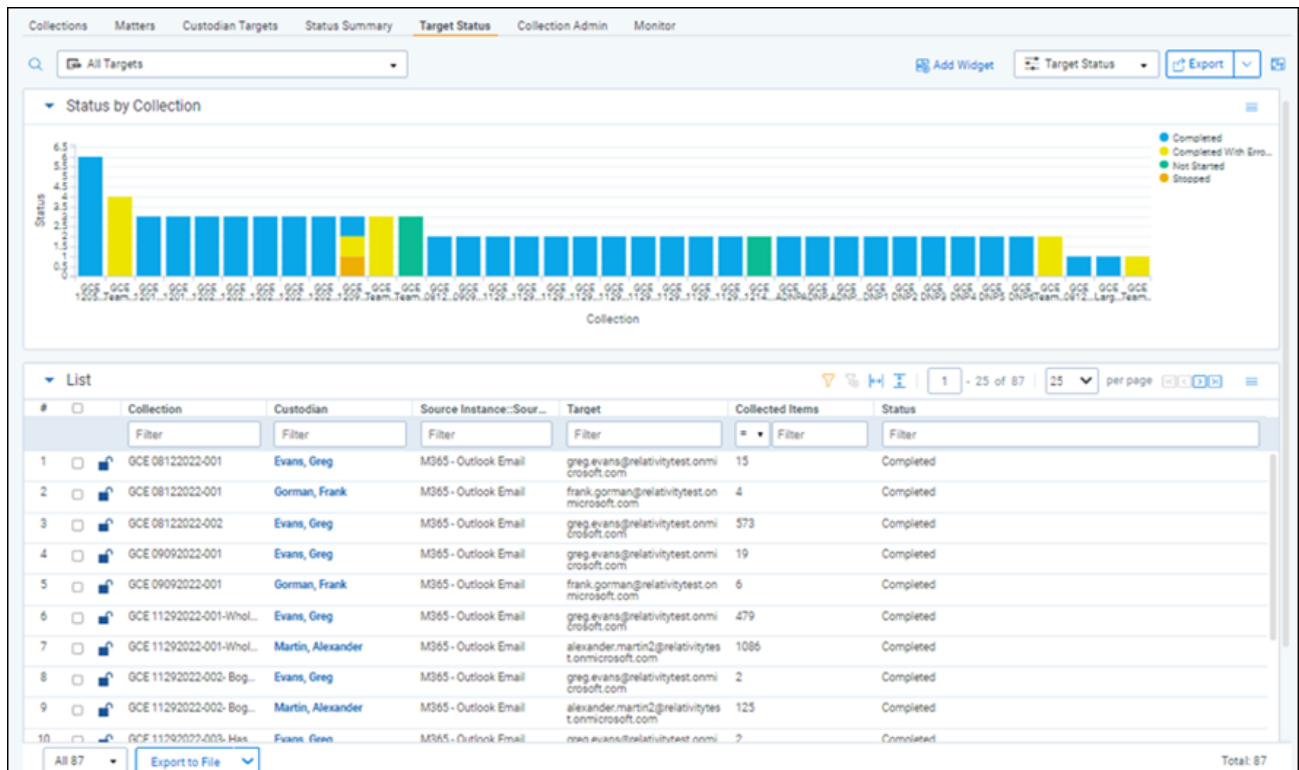
The job status dashboard is available after generating targets. To learn how to generate targets for a collection, see [Collection Summary on page 102](#). Once you generate targets, the dashboard organizes by collection jobs.

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 111](#).
- **Error**—the collection did not run successfully and couldn't collect from the target.

## 21 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.







## 22 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 have not 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.

QUEUED	RUNNING	COMPLETED
<b>Test</b> <b>bco custodian 201 ALL</b> <div> <b>Beta Custodian201</b> <i>Relativity Test Outlook</i></div> <div> <b>Beta Custodian201</b> <i>Relativity Test OneDrive</i></div> <div> <b>Beta Custodian201</b> <i>Relativity Test Calendar</i></div> <div> <b>Beta Custodian201</b> <i>Relativity Test Contact</i></div>	<b>bco custodian 203</b> 1 of 2 collections completed <div> <b>Beta Custodian203</b> <i>Relativity Test OneDrive</i> Completed 7762 files retrieved Elapsed time: 00:07:29</div> <div> <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 <div><div></div>39% 00:21:16</div></div>	<b>T010 Test 1</b> <div> <b>Beta Custodian202</b> <i>Relativity Test OneDrive</i> Completed With Errors 3006 files retrieved Elapsed time: 00:04:51</div> <div> <b>Beta Custodian202</b> <i>Relativity Test Outlook</i> Completed 116 emails retrieved Elapsed time: 00:00:03</div> <b>bco Custodian 201</b> <div> <b>Beta Custodian201</b> <i>Relativity Test Outlook</i> Completed 1010 emails retrieved Elapsed time: 00:00:16</div> <div> <b>Beta Custodian201</b> <i>Relativity Test OneDrive</i> Completed 2855 files retrieved Elapsed time: 00:04:10</div>

QUEUED	RUNNING	COMPLETED
No collections are queued.	<b>bco Groups</b> 2 of 3 collections completed <div> <b>Babbage, Ada</b> <i>Google Workspace Mail Data Source</i> Collection completed 19268 Artifacts exported 384 MB downloaded</div> <div> <b>Babbage, Ada</b> <i>Google Workspace Groups Data Source</i> Collection completed 11 Artifacts exported 689 KB downloaded</div> <div> <b>Babbage, Ada</b> <i>Google Workspace Drive Data Source</i> Waiting for Export to complete 7302 out of 7350 Artifacts exported Estimated completion: 10/26/2020, 5:01:04 PM <div><div></div>99% 00:06:23</div></div>	<b>MN Gmail Test</b> <div> <b>Babbage, Ada</b> <i>Google Workspace Mail Data Source</i> Collection completed 19268 Artifacts exported 384 MB downloaded</div>

## 23 Collect Store

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

When wanting to store collected data, select the Store option as the processing source location as the collection output in the Collect Details step of the Collect wizard. For more information, see [Using the Collect wizard on page 98](#).

### 23.1 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 98](#).

### 23.2 Exporting collected data

When it is 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 does not change when it is exported.

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