Relativity aiR

Collect - Google Workspace

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1 Collect

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

Note: This document covers the Google Workspace source.

1.1 Data sources

In Collect, you can collect data from a variety of data sources. For more information, see Data sources on page 14.

- **Cellebrite**—collect data from Cellebrite. For more information, see Cellebrite data source on page 15.
- **ChatGPT Enterprise**—collect data from ChatGPT Enterprise. For more information, see ChatGPT Enterprise data source on page 21.
- **Claude**—select to collect from Anthropic's Claude. For more information on specific fields and settings, see Claude on page 25.
- **Google Workspace**—collect documents from Chat, Drive, Gemini, Gmail, and Groups. You can also collect files directly into Relativity aiR 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 data source on page 36 and Google Gemini data source on page 46i.

1.2 Commercial and Government support

There are no other limitations compared to Relativity aiR commercial instances aside from data source connector availability.

Use the following table to see available connectors in Relativity aiR Government instances compared to commercial instances.

Note: Inactive mailbox, and Inactive OneDrive for Government is currently only supported for customers in Microsoft GCC tenants.

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 Relativity aiR 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 Relativity aiR. For Relativity aiR's system requirements, see System Requirements on the Relativity aiR Documentation site.

2.2 Installing Collect

Collect is compatible with Relativity aiR. See Getting started in Relativity aiR on the Documentation site for requirements.

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

- 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.

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

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 Relativity aiR Documentation site.

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

Note: Feature Permissions provide an alternative to Relativity's security management by shifting the focus from Object Types and Tab Visibility to feature-based permissions. This method is an alternative option. Any feature-specific permissions information already in this and other topics is still applicable. The Feature Permissions interface enables administrators to manage permissions at the feature level, offering a more intuitive experience. By viewing granular permissions associated with each feature, administrators can ensure comprehensive control, ultimately reducing complexity and minimizing errors. For details see Instance-level permissions and Workspace-level permissions.

Object Security	Tab Visibility	Other Settings
Collect Objects: • **Collection** — View, Edit, Add • **Collection Detail Custodian** — View, Edit, Add, Delete • **Collection Detail Custodian Target** — View, Edit, Add, Delete • **Collection Detail Custodian Target Result** — View, Edit, Add, Delete • **Collection Detail Noncustodial Source** — View, Edit, Add, Delete • **Collection Detail Noncustodial Target** — View, Edit, Add, Delete • **Collection Detail Request** — View, Edit, Add, Delete • **Collection Detail Source Instance** — View, Edit, Add, Delete • **Collection Detail Source Type** — View, Edit, Add, Delete • **Collection Detail Summary** — View, Edit, Add, Delete • **Collection Matter** — View, Edit, Add	• Collections • Monitor • Custodian Targets • Status Summary • Custodial Target Status • Non-Custodial Target Status • Entities (only needed if user must see Entities) • Any processing tabs (only needed if user will access Processing)	• None

Object Security	Tab Visibility	Other Set-tings
• **Collection Run** — View, Edit, Add • **Collection Source Instance** — View • **Collection Source Instance Parameter** — View • **Collection Source Target Parameter Instance** — View • **Collection Source Target Parameter Type** — View • **Collection Source Type** — View • **Collection Source Type Criteria** — View • **Collection Source Type Criteria Validator** — View • **Collection Source Type OAuth Definition** — View • **Custodian Target** — View, Edit, Add, Delete • **Custodian Target Generation Error** — View, Edit, Add, Delete • **Entity** — only View, unless user needs to manage Entities in which case include Edit, Add • **Noncustodial Data Source Instance** — View, Edit, Add, Delete • **Noncustodial Target Generation Error** — View, Edit, Add, Delete Objects required for integrated Processing functionality: • **Folder** — View, Edit, Add • **Processing Data Source** — View, Edit, Add • **Processing Error** — View, Edit, Add • **Processing Profile** — View, Edit, Add • **Processing Set** — View, Edit, Add • **Relativity Time Zone** — View, Edit, Add		

2.4 Uninstalling the application

If you need to remove the Collect application from your workspace, contact Relativity Support.

3 Matters

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

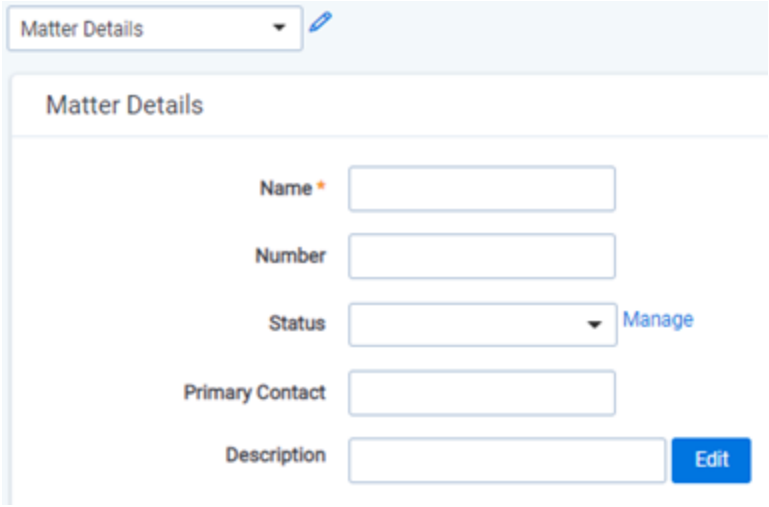
You can also create a matter when you add a new collection. Click the **Add** link next to the Matter field in the Collection layout. See Creating a collection on page 50.

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.
- **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.



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 50.
    - **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.

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

4.1 Custodians

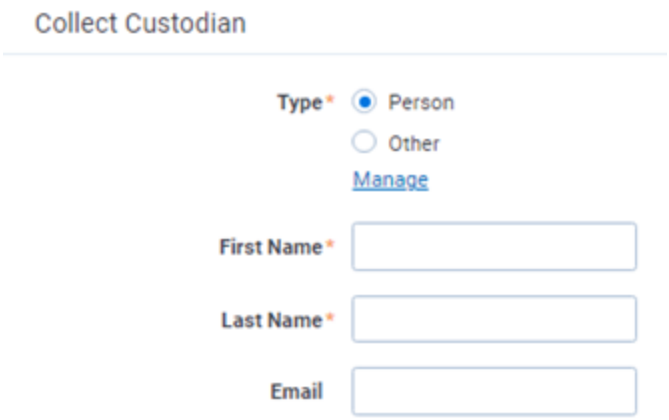
Once you create an entity in the Collect Custodian view and add it to a collect project, it becomes a custodian.

If a custodian does not exist, you can manually create an entity from the Entities tab. If a custodian does exist, you can create a custodian target. For more information, see Creating a custodian target.

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 below.
4. Click **Save**.

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



4.2 Fields

When creating an entity, the Collection Custodian layout provides the following fields and others. To successfully create a collect entity, at a minimum, complete the following fields:

- **Custodian Type** (Required)—select one of the following:
  - **Person**—select this option to enter first and last name of the individual acting as custodian of the data you wish to process.
  - **Other**—select this option if the custodian of the data to process is not an individual but is, for example, just a company name.
    - Selecting this option changes the Custodian layout to remove the required First Name and Last Name fields and instead presents a required Full Name field.
    - You can also select this option to enter an individual's full name without having that name include a comma once you export the data associated with it.
- **First Name** (Required)—the first name of the custodian. This field is only available if you've set the Custodian Type to Person.
- **Last Name** (Required)—the last name of the custodian.
  - This field is only available if you've set the Custodian Type to Person.
- **Full Name**—the full name of the custodian of the data you wish to process.
  - Required when you set the Custodian Type to Other, Organization, or a custom choice type.
  - When you enter the full name, it does not contain a comma when you export the data associated with it.

- **Email** (Required)—the email the custodian uses in the target.
  - The entity's email is required to connect the entity to a custodian target. The email is not required to save the entity.
  - This email address must match the email address within the connected data source.

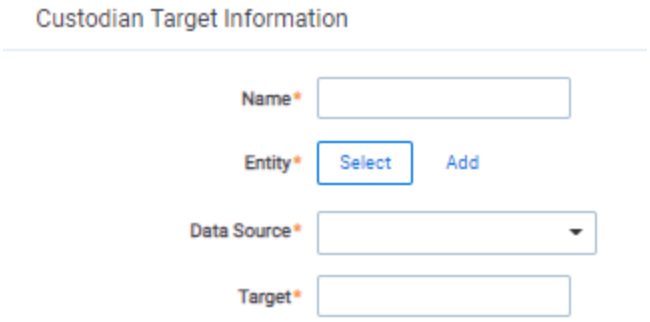
4.3 Creating a custodian target

You can collect electronic data from custodians who are individuals, or entities, involved in a legal action or case. You 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. Custodian Targets can also be automatically generated in the Collection Summary step of the Collect wizard. For more information, see Collection Summary on page 53.

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 page 15.
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 the Collection Summary step of the Collect wizard. For more information, see Collection Summary on page 53.

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.

If an invalid custodian target is created manually, the auto-generation of custodian targets does not remove the invalid custodian target. Remove it manually. Any errored targets display in the Collection Summary step or on the Status Summary tab.

To delete a custodian target from the Custodians Targets tab, click the data source's checkbox and use the Delete mass operation.

4.4 Removing custodian targets

To remove any custodian target, first remove the custodian 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 results 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.

Note: Data sources cannot be deleted once it's been run on a collection.

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 11.

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

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

1. Navigate to **Collection Admin**.
2. Click the **New Collection Source Instance** button.
3. Do the following:
    - **Name**—enter in a unique name for the data source.
    - **Type**—select the type of data source. For more information, see Data source types on the next page.

      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.
    - **Settings**—enter the data source-specific settings. For more information on specific fields and settings, locate your data source topic from Data source types on the next page.
4. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the data source instance. If successful, the data source is saved. If the connection fails, a message displays 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 the data source is set up, you'll see the data source information on the Collection Admin page.

5.1.1 Third-party vendor

If you are a vendor setting up a data source on behalf of a client, the client does not need access to the Relativity workspace. You manage the workspace setup on their behalf. The client only needs to provide admin credentials for their platform to complete the data source setup. The client has two options:

- The platform admin shares their credentials with you directly.
- The client creates a dedicated admin account for you to use.

We recommend completing this step in a screenshare session with the client's admin to avoid sharing credentials outside of the client's organization.

5.2 Data source types

You can select any of the following data source types for step 3 of Creating a collect data source on the previous page:

- **Cellebrite**—collect data from Cellebrite. For more information, see Cellebrite data source below.
- **ChatGPT**—select to collect data from ChatGPT. For more information on specific fields and settings, see ChatGPT Enterprise data source on page 21.
- **Claude**—select to collect from Anthropic's Claude. For more information on specific fields and settings, see Claude on page 25.
- **Google Workspace**—select to collect data from Google Chat, Drive, Gmail, or Groups.
  - Google Chat is collected as grouped collections. At the data source level, the custodian appears as the data source name.
  - For more information on specific fields and settings, see Google Workspace data source on page 36.
- **Google Gemini**—select to collect data from Google Gemini. For more information on specific fields and settings, see Google Gemini data source on page 46

6 Cellebrite data source

This topic provides details on how you can remotely capture mobile device messages and attachments from Android or iOS devices using the Cellebrite data source within Collect.

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see Terms of Use.

Note: The steps below apply whether you are using Cellebrite Endpoint Inspector or Endpoint Mobile Now. Going forward in this topic, we will simply refer to them as Cellebrite.

6.1 Considerations

Review the list of considerations before starting your collection:

- This functionality is available to Relativity aiR US and UK-based commercial clients. It is not yet available to US Government clients or those outside the US and UK.
- Cellebrite data source requires separate licensing, configuration, and training through Cellebrite.
  - For more information, log in to your account at MyCellebrite.com to download the installation files and manuals based on which product you are using:

Note: To ensure a successful data collection, be sure that you and the custodian familiarize yourselves with Cellebrite's documentation, recommendations, and tips for mobile collections before you begin collecting. Also be sure to review the What's New in Version <#.#> chapter of the Cellebrite Endpoint Inspector or Endpoint Mobile Now user guides.

  - Cellebrite Endpoint Inspector User Guide
  - Cellebrite Endpoint Inspector SaaS Communication and Security Guide
  - Cellebrite Endpoint Mobile Now User Guide
- The output generated from mobile device collections consists of all short message-type data in Relativity Short Message Format (RSMF) files.
  - The corresponding Cellebrite Universal Forensic Electronic Device (UFD) file is also uploaded to your StagingArea.
  - An example of a UFD file is a forensic image.
- UFD files cannot be processed. However, they are made available if you need the UFD downloaded for examination outside of Relativity aiR.
- Collect captures all short message data that Cellebrite successfully extracts from a device and, converted to RSMF.
  - This includes original UFD image and collection reports.
  - Support for specific apps depends on whether Cellebrite can extract and decode that app's data for the device, operating system, and app version.

6.2 Prerequisites

Basic configuration for your instance of Cellebrite and Relativity aiR must be completed as follows:

- In Cellebrite:
  - Set up your instance.
  - If using Endpoint Inspector, create the required user account with the Examiner role.
  - Ensure the required ports are open.
  - For use with Relativity aiR, you do not need to set up a storage repository.
- In Relativity aiR: The Collect application must be installed into the Relativity workspace that is used to perform Cellebrite collections. For more information on installing Collect in a workspace, see Installing Collect.

6.3 Collection size

Cellebrite data volume depends on the size and scope of the original device extraction.

Category	Details
Hard limits (enforced)	Extraction-defined
Planning thresholds (guidance)	Full device extractions can be large
When to split	Very large extractions
Notes	Mobile data post-extraction

Use extraction scope to guide splitting decisions rather than custodian count.

6.4 Task checklist

The table below outlines the tasks in the order they need to be performed and within which application to perform them.

Order	Application Used	Task Type	Task
1	Relativity aiR	Configuration	Create the OAuth2 Client below
2	Relativity aiR	Configuration	Set permissions in Relativity aiR on the next page
3	Cellebrite	Configuration	Connect Cellebrite to Relativity aiR on the next page
4	Cellebrite	Configuration	Generate API key for Cellebrite data source on the next page
5	Relativity aiR	Configuration	Create the data source in Relativity aiR on page 19
6	Relativity aiR	Configuration	Create entities in Relativity aiR on page 19
8	Relativity aiR	Collecting	Create a Collect job in Relativity aiR on page 20

6.4.1 Support resources

If you have questions or issues while going through these procedures, please contact the following resources depending on the application:

- **Cellebrite (Endpoint Inspector or Endpoint Mobile Now)**—contact Cellebrite Customer Support or log in to your MyCellebrite account to view Cellebrite's documentation.
- **Relativity aiR Collect**—contact Relativity Customer Support or refer to Relativity Documentation or Community Site for more information.

6.5 Create the OAuth2 Client

To facilitate data transfers and communication of collection status updates from Cellebrite to Relativity aiR, an OAuth2 client must be configured in Relativity aiR. Use the following steps to create a new OAuth2 Client. For more detailed instructions, see documentation on creating and editing an OAuth2 client.

In Relativity aiR:

1. Navigate to the **OAuth2 Client** tab within Authentication.
2. Click the **New OAuth2 Client** button.
3. Do the following:
    - **Name**—enter a unique name for the OAuth2 client.
    - **Enabled**—ensure the **Enabled** toggle is on.
    - **Flow Grant Type**— select **Client Credentials** from the list.
    - **Context User**—select a user account from the list. The Context User will also generate the Cellebrite API key that is used to configure the Collect data source.
    - **Access Token Lifetime** (in minutes)—enter **60**.

4. Click **Save**.
5. Make note of the **Client ID** and **Client Secret** values that were generated. These values are needed when connecting Cellebrite to Relativity aiR.

6.6 Set permissions in Relativity aiR

Ensure the following account permissions are properly set up. For additional information, see Adding user to groups and Setting workspace permissions.

- **For Context Users**—The Context User selected in the previous section must be added to a group in Relativity aiR that is assigned to the workspace in which Cellebrite collections are run. The group within the workspace must have **Allow Export** and **Allow Import** permissions selected (enabled) under Admin Operations on the Other Settings tab. See Manage Workspace Permissions for more information.
- **For Relativity Service Account**—assign the Relativity Service Account (**Service Account, Relativity**) user to a group (other than the System Admin group) that has been assigned to the workspace in which Cellebrite collections are run.

6.7 Connect Cellebrite to Relativity aiR

Next, you must connect Cellebrite to Relativity aiR using the Client ID and Client Secret obtained in Create the OAuth2 Client on the previous page.

In Cellebrite:

1. Navigate to **Settings**.
2. Scroll to the **Relativity aiR** section and do the following:
   - **Client ID** and **Client Secret**—enter the ID and secret generated previously when creating the OAuth2 client in Relativity aiR.
   - **Domain**—enter the Relativity aiR domain. For example, esus019064-t066.r1.kcura.com. This is not the full URL address, so you do not include "https://" or the ending slash.
3. Click **Save**.

6.8 Generate API key for Cellebrite data source

After connecting Cellebrite to Relativity aiR, you must generate and save the API key. This API key is entered in Relativity aiR when creating a new data source outlined in the next section.

Note: The user generating the API key must be the Context User set up in Create the OAuth2 Client on the previous page.

In Cellebrite:

4. Navigate to **User Settings** if using Endpoint Inspector or to **Settings** if using Endpoint Mobile Now.
5. Click **Generate Key**.
6. Copy the **API Key** and save it securely.

Caution: You will not be able to see this API key again in Endpoint Inspector or Endpoint Mobile Now so be sure to copy and save it.

This API key is required when you create a new data source next in Relativity aiR. You must also provide the following information:

- The exact username that was used to generate the API key if you used Endpoint Inspector.
- The exact email address that was used to generate the API key if you used Endpoint Mobile Now.
- The URL for your instance of Endpoint Inspector or Endpoint Mobile Now. For example: https://example.ei.-cellebrite.cloud/

6.9 Create the data source in Relativity aiR

Next, create a new Collect data source instance in your Relativity aiR workspace.

Note: You must have previously installed the Collect application into your workspace. For more information on installing Collect, see Installing Collect.

In Relativity aiR:

7. Navigate to **Collection Admin** within Collect Admin in Set Up.
8. Click **New Collection Source Instance**.
9. Do the following:
    - **Name**—enter a unique name for the data source.
    - **Type**—select the **Cellebrite** data source.
    - **Settings**—enter the required information in the Settings fields. For more information, see Settings fields below.
10. Click **Save**. The data source displays on the Collection Admin page.

6.9.1 Settings fields

To connect Relativity to the Cellebrite data source, you need to gather and enter the information for the following fields. This information was generated in the Generate API key for Cellebrite data source on the previous page section.

- **API Key**—the API key previously generated in Cellebrite.
- **API Username**—the Cellebrite user account used to generate the associated API Key.
    - If Endpoint Inspector was used to create the API key, then enter the user's username (for example, jane.-smith).
    - If Endpoint Mobile Now was used to create the API key, then enter the user's email address (for example, jane.smith@relativity.com).
- **API URL**—the Cellebrite server URL for the associated API Key.

6.10 Create entities in Relativity aiR

Within your Relativity aiR workspace, populate the Entities list with those individuals from which you wish to collect data. For more information on populating Relativity with entities, see Entity object documentation.

Note: Ensure that the Email address field for the Entity (such as, custodian) contains the primary email address to which you want Cellebrite collection requests emailed. The Secondary Email address information for the entity is not used.

6.11 Create a Collect job in Relativity aiR

You can begin creating and running collections in Relativity aiR. For more information, see Collections.

Be aware of the following when performing Cellebrite collections:

- You cannot combine other data source types with the Cellebrite data source.
- You can collect from multiple custodians in the same job when using the Cellebrite data source.

All dates are in Coordinated Universal Time (UTC).

6.12 Mobile data collection results

The export package created by Cellebrite for ingestion by Relativity aiR includes these files:

- Original collection file in UFED zip format
- Messages and attachments in an RSMF collection
- UFED reader file (UFD)
- Device Report
- Collection Report
- Results.csv file

The nature of data collections from Android and iOS devices differs due to the inherent differences between platforms. These are the most noteworthy differences:

- iOS message collections target messages from native apps and the most popular third-party apps that iTunes can back up. Attached media and document files are included.
- Android message collections target SMS, MMS, and RCS text messages from native apps. Attached media and document files are included.

6.13 Troubleshooting

This table includes troubleshooting for Cellebrite data source.

Area	Issue	Resolution

Data Source setup	User is unable to save a Cellebrite data source configuration in Collect or validation fails on an existing source.	• Verify the user has entered the correct value for the API key.
		• Verify the API Username is the Cellebrite account used to generate the API key in Cellebrite.
		  ◦ For Endpoint Inspector, this is the user account name.
		  ◦ For Endpoint Mobile Now, this is the email address of the user.
		• Verify the Context User who configured the OAuth2 client in Relativity aiR is also the same user who generated the API key in Cellebrite.
		• If the problem still exits after verifying the information in the previous bullets, then generate a new API key in Cellebrite.

Job start	The Collect job fails	• Verify in Cellebrite Settings that the OAuth2 client setup for Relativity

Area	Issue	Resolution
	when the user clicks the Start button.	aiR has the correct values for the Client ID and Secret. They must match the values in Relativity aiR for the OAuth2 client configured. • Verify in Cellebrite Settings that the Domain for the OAuth client setup for Relativity aiR points to the correct Relativity aiR instance. The Domain should NOT contain “https://” or end with a trailing slash. For example, the domain should look like this *esus019064-t066.r1.k-cura.com* and not this *https://esus019064-t066.r1.kcura.com/*. • In very rare cases, C4 may be down, in which case Collect jobs will not start regardless of the collection data source. This issue usually resolves itself after a short waiting period. C4 is the shared compute platform on which jobs are run.
Custodian Email Notification	The Collect job started successfully, but the custodian never received the collection request email.	• Verify that the custodian's email address is the same as the one entered in the Email address field of their corresponding entity record. The Secondary Email address information for the entity is not used. • Verify that the email is not in the Spam or Junk folder. • Verify that the custodian’s organization has not intercepted or quarantined the email via an email security policy or software, such as Proofpoint. • If the problem still exits after verifying the information in the previous bullets, then please contact Cellebrite Customer Support to verify that there are no issues sending email messages from Cellebrite.
File Transfers	The file transfers into Relativity aiR are failing.	• Verify that the Context User account used to configure the OAuth2 client is in a group assigned to the workspace, and the group has been given the “Allow Import” and “Allow Export” permissions in Relativity aiR. See Set permissions in Relativity aiR on page 18. • Verify that the Relativity Service Account user is assigned to one of the groups assigned to the workspace. See Set permissions in Relativity aiR on page 18.
Target Failure	The target collection fails after successful start.	If a job successfully started (e.g., was received by Cellebrite), but failed prior to the collection being uploaded to Relativity aiR, then the problem resides within Cellebrite. Please contact Cellebrite Customer Support for assistance.

7 ChatGPT Enterprise data source

This topic provides details on how to capture OpenAI's ChatGPT Enterprise with Collect.

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see Terms of Use.

7.1 Considerations

Note the following considerations about this data source:

- This connector requires a ChatGPT Enterprise subscription.
- OpenAI's Compliance API only keeps data for 30 days. Collect can only retrieve ChatGPT data from the past 30 days.
    - OpenAI does not keep deleted data for more than 30 days, unless legally required otherwise.
    - Temporary chats, also called ephemeral chats, are only available for 30 days. These are conversations where OpenAI's Memory feature is disabled. The chat session is not saved to the user's history.
        - Temporary chats are accessible through the OpenAI Compliance API. They are included in Collect if your date filters are set correctly.
        - Temporary chats must fall within the 30-day retention window to be collected.
    - To avoid missing data, we recommend scheduling regular, ongoing collections before data is removed at the end of the 30-day retention window.
- Before your first collection, confirm that your organization enabled the Compliance API in its OpenAI account. This setting supports retrieval of both persistent and temporary conversations.
- For date criteria, ChatGPT Enterprise supports a start date. Collect retrieves all prompts and responses from the date you specify through the current date.
- If your organization has multiple ChatGPT Enterprise workspaces, you must configure a separate data source for each workspace in the Collect application. Name each data source to identify the workspace connects to.
- Relativity automatically converts collected conversation prompts and responses to Relativity's short message format (RSMF).
- ChatGPT metadata is collected. For more information, seeCollected metadata on the next page.

7.2 Prerequisites

Complete the following before setting up a ChatGPT data source in Relativity:

- Eligible Enterprise and Education workspace owners can create a workspace-scoped Admin key with the permissions needed by the integration.
    - Create Admin key on the *Admin Console* > *Credentials* > *Admin keys* page.
    - For more information, see OpenAI's documentation.
    - Existing authorized keys do not need replacing just because self-service is available.
    - Contact OpenAI Support only self-service is unavailable.
- Confirm that the Compliance API is enabled in your organization's OpenAI account to support retrieval of both persistent and temporary conversations.

Once you complete the prerequisites, you can begin creating the data source.

7.3 Collection size

ChatGPT Enterprise collections scale with conversation volume and duration.

Category	Details
Hard limits (enforced)	No explicit hard cap published
Planning thresholds (guidance)	High-usage enterprise tenants
When to split	Long date ranges
Notes	Conversion-based scaling

Focus on limiting time ranges in high-usage environments to control collection size.

7.4 Collected metadata

As of the current integration with OpenAI's Compliance API, the metadata fields are captured and included in collections:

The following metadata fields are captured from ChatGPT Enterprise conversations via the Compliance API and included in Collect:

Metadata	Collected
Conersation ID	Always
Conversation title	Always
User ID	Always
User name	When user is logged in.
User email	When user is logged in.
Timestamp of prompt	Always
Timestamp of response	Always
Prompt text	Always
Response text	Always
Edit history	When a prompt was edited before re-execution.
Source attributions	URLs of any publicly cited websites when browsing was enabled.
Attachments	Uploaded files submitted by users during the conversation. For example, PDFs, DOCX, images, CSV files. Generated files. For example, documents or images created by ChatGPT in response to prompts.

These fields are extracted for both persistent and ephemeral (temporary) conversations, as long as they fall within OpenAI's 30-day retention window and meet your search criteria in Collect.

7.5 Creating the data source

Use the following procedure to connect the ChatGPT Enterprise workspace data source to Collect.

In Relativity aiR:

1. Navigate to **Collection Admin** within Collect Admin of Set Up
2. Click the **New Collection Source Instance** button.
    - **Name**—Enter in a unique name for the data source.
    - **Type**—Select the **ChatGPT Enterprise** data source.
    - **Settings**—enter the required information in the Settings fields. For more information, see Settings fields below.
3. Click **Save**. The data source displays on the Collection Admin page.

7.6 Settings fields

To connect Relativity to a ChatGPT Enterprise workspace, you need to gather and enter the information for the following fields.

- **API Key**—enter the API Key that you created in OpenAI.
    - You can use the same API Key when configuring multiple ChatGPT Enterprise data sources from which you wish to collect.
    - For more information, see OpenAI's documentation.

    Note: Only contact OpenAI Support if you cannot create your own API Key.
- **Workspace ID**—enter the ChatGPT Enterprise WorkspaceID to which you want to connect.

7.7 Configuring the data source

Each data source used in Collect has different search criteria on the Collection Details step when creating a collection job. The criteria needs to be configured next.

Relativity collects ChatGPT Enterprise chat data in Relativity's short message format (RSMF).

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.

    Note: You must set a Start Date to complete the Data Sources step.
- **Operator**—choose an operator. For example, equals or greater than.
- **Value**—enter a value to find in the selected field.

The following table lists the filter criteria supported for ChatGPT Enterprise collections.

All dates are in Coordinated Universal Time (UTC).

Criteria	Operators	Description	Example
Start Date	Greater Than or Equals	When you use the Start Date property in a query, the search returns prompts and responses that exist the day of and after the entered date.	When you search a Start Date of 1/1/2024, Relativity collects all prompts and responses from that date to today.

Note: Temporary, or ephemeral, chats will also be returned if they occurred within the 30-day retention window and meet your search criteria.

8 Claude

Collect integrates with Claude (Anthropic) to collect enterprise AI conversations and generated content. This integration uses Anthropic's Compliance API and provides read-only access to in-scope data that exists at the time of collection.

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This topic provides details on how to capture Anthropic's Claude Enterprise with Collect.

8.1 Considerations

Note the following considerations about this data source:

- **Account and API access**
  - This connector requires a Claude Enterprise account.
  - The Anthropic Compliance API is only available with an Enterprise subscription.
  - Admin or standard API keys are not sufficient.
  - Only a Compliance access key, created by an Anthropic organization administrator or Enterprise Primary Owner, can retrieve conversation content, files, and artifacts.
- **Retention and deleted data**
  - Relativity collects deleted data only if Anthropic still retains the content.
  - Anthropic does not keep the content of deleted conversations, but it may keep records that the conversation occurred.
  - Your organization sets the retention policy. For more information on retention policies, see Anthropic's documentation.
  - Collection completeness is dependent on Anthropic retention policies and data availability at run time.
- **Collection behavior**
  - If you have multiple Claude organizations, you must configure a separate data source for each organization.
  - We recommend clearly naming each data source.
  - Relativity automatically converts collected conversation prompts and responses to Relativity's short message format (RSMF). For more information, see the Relativity Short Message Format guide.
  - Relativity collects Claude metadata. For more information, see Collected metadata on the next page.
- **Defensibility**
  - Access is read-only.
  - Collect does not modify or delete Claude data.

- Data is retrieved directly via Anthropic’s Compliance APIs.

8.2 Prerequisites

Before configuring your data source in Collect, you must enable the Compliance API on Anthropic's side to obtain an API key.

For more information about the Compliance API, see Anthropic's documentation.

Once you enabled the Compliance API, you can begin creating the data source.

8.3 Collected data

When configured with a valid Compliance access key, Collect can retrieve the following data from Claude Enterprise:

- **Conversations**—user prompts and Claude responses, collected in chronological order.
- **Artifacts**—AI-generated outputs such as documents or code artifacts.
- **Files**—user-uploaded and assistant-generated files associated with conversations.
- **Metadata**—custodian, user, timestamps, and conversation identifiers.

To make data review-ready in Collect,

- Collected conversations are ingested as parent documents.
- Artifacts and files linked as child documents or attachments.

8.3.1 Collected metadata

Relativity collects metadata from Anthropic’s Compliance API as part of activity logs. For each action, like sending a prompt, getting a response, or uploading a file, Relativity collects all related metadata.

As of the current integration with Anthropic's Compliance API, Relativity captures the following metadata fields in collections:

Metadata	Collected
Conversation ID	Always
Conversation title	Always
User ID	Always
User name	Always
User email	Always
Timestamp of prompt	Always
Timestamp of response	Always
Prompt text	Always
Response text	Always
Edit history	Captures updates when a user edits and re-runs a prompt.
Attachments	Claude generated files, and user uploaded files submitted by users

Metadata	Collected
	during the conversation.

8.3.2 Retention expectations and data availability

Collect retrieves only the Claude data that is retained and accessible at the time of collection.

Collections reflect the current retained state of Claude data and are not a historical reconstruction of all past activity.

Key considerations:

- Claude Enterprise retains conversation content by default, but customers may configure shorter retention periods.
- Conversations or artifacts deleted by users or retention policies cannot be collected.
- Collect cannot reconstruct historical data that no longer exists in Anthropic systems.

8.4 Creating the data source

Use the following procedure to connect the Claude data source to Collect.

In Relativity aiR:

1. Navigate to **Collection Admin**.
2. Click the **New Collection Source Instance** button.
3. Complete the following fields:
    - **Name**—enter a unique name for the data source.
    - **Type**—select the Claude data source.
    - **Settings**—enter the required information in the Settings fields. For more information, see Settings fields.
4. Click **Save**.

After clicking Save, Relativity verifies the parameters and connectivity to the data source instance.

- When verification is successful, Relativity saves the data source.
- When the connection fails, Relativity displays a message indicating that the connection failed.
    - When verification fails, verify that the values are correct.
    - Relativity can only save the data source when the values are correct and verified.

The data source displays on the Collection Admin page.

8.5 Settings fields

To connect Relativity to an Claude workspace, you need to gather and enter the information for the following fields:

- **API Key**—enter the API key that Anthropic provided to your organization. You can use the same API key when configuring multiple Claude data sources from which you want to collect.
- **Organization ID**—enter the Claude Organization ID.

8.6 Configuring the data source

Each data source used in Collect has different search criteria on the Collection Details step when creating a collection job. The criteria needs to be configured in this step.

Relativity collects Claude chat data in Relativity's short message format (RSMF). For more information, the Relativity Short Message Format guide.

Add search criteria to collect specific data. To configure the data source, 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. You must set a Start Date to complete the Data Sources step.
- **Operator**—choose an operator. For example, equals or greater than.
- **Value**—enter a value to find in the selected field.

The following table lists the filter criteria supported for Claude collections:

All dates are in Coordinated Universal Time (UTC).

Criteria	Operators	Description	Example
Created Date	Greater Than, Greater Than or Equals, Less Than, Less Than or Equals	When you use the Created Date property in a query, the search returns prompts and responses that exist the day of and after the entered date.	When you search a Created Date of 1/1/2026 to 12/31/2026, Relativity collects all prompts and responses from that date to the end of 2026.
Updated Date	Greater Than, Greater Than or Equals, Less than or Equals	When you use the Updated Date property in a query, the search returns prompts and responses that exist the day of and after the entered date.	When you search a Updated Date of 1/1/2026 to 12/31/2026, Relativity collects all prompts and responses from that date to the end of 2026.

9 Google

Before you collect from a Google data source, Workspace or Gemini, you must complete the following tasks:

Instance	Process	Procedure
Google Workspace	Google above	1. Create a Google Cloud project on the next page 2. Enable required APIs for the project on the next page 3. Set up OAuth2 consent screen on page 30 4. Add scopes on page 30 5. Create credentials on page 31 6. Set reauthentication policy on page 33
	Google Workspace user account setup on page 33	1. Create admin role for Vault API on page 33

Instance	Process	Procedure
		2. Create admin role for the user accounts listing on page 34 3. Create admin role for the groups listing on page 34 4. Enable required privileges on page 34
	Restricting collections to the selected user accounts on page 35	1. Create an organizational unit on page 35 2. Add users to the organization unit on page 35 3. Scope user privileges to the organizational unit on page 36
Relativity aiR	Google Workspace data source on page 36	1. Create the data source on page 48 2. Configure the data source in Collect on page 39
	Google Gemini data source on page 46	1. Create the data source on page 48 2. Configure the data source in Collect on page 49

The procedure is the same for any Google Workspace data source and Google Gemini.

9.1 Google Workspace account setup

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

9.1.1 Create 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 (https://console.cloud.google.com/cloud-resource-manager).
2. Click **Create Project**.
3. 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.
4. Click **Create**.

9.1.2 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 in the Google Cloud Console:

1. In the Google Cloud Console (https://console.cloud.google.com/), select the newly created project.
2. Enter *Google Vault API* in the search bar and search.
3. Click the **Google Vault API** option.
4. Click **Enable**.
   You will then see the Google Vault API/Service Details page.
5. Enter *Admin SDK API* in the search bar and search.
6. Click the **Admin SDK API** option.
7. Click **Enable**.
   You will then see the Admin SDK API/Service Details page.
8. Enter *Cloud Storage API* in the search bar and search.
9. Click the **Cloud Storage API** option.

   Note: Be sure to choose Cloud Storage API. Cloud Storage API is different than Cloud Storage.

10. Click **Enable** if the API is not already enabled by default.

9.1.3 Set up OAuth2 consent screen

Follow the steps to create a OAuth2 consent screen in Google Cloud Console.

1. In the Google Cloud Console (https://console.cloud.google.com/) and select newly created project.
2. Select **APIs & Services>OAuth consent screen**.
3. Click **Get started**.
4. Enter the **App information**.
   - **App name**—enter a name for the Collect app you're using. For example, *Relativity Collect*.
   - **User support email**—select the email address for users to contact you with questions about their consent.
5. Click **Next**.
6. Select **Internal** audience type and click **Next**.
7. Enter an email address in the **Contact Information** field.
   Google uses this email address to notify you about any changes to your project.
8. Click **Next**.
9. Complete the **Finish** step by selecting the check box and click **Continue**.
10. Click **Create**.

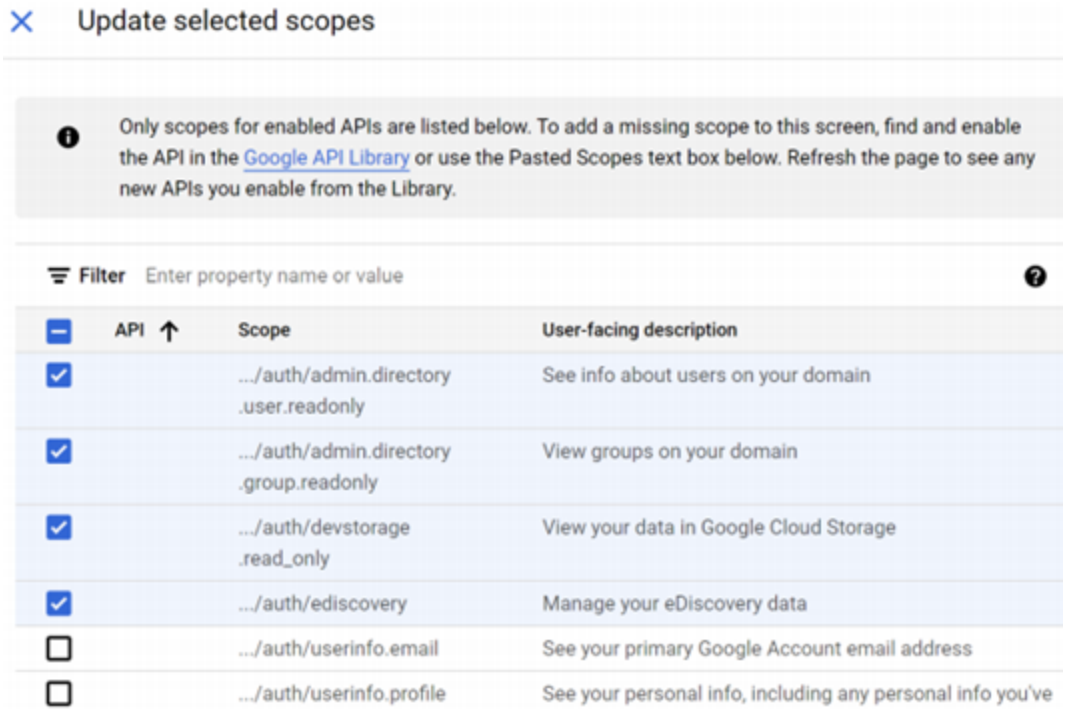
Your Oauth configuration has been created.

9.1.4 Add scopes

Next, you must add scopes.

1. In the Google Cloud Console (https://console.cloud.google.com/), navigate to **Data Access**.
2. Click **Add or remove scopes**.

3. 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**
     Google Vault API | .../auth/ediscovery | Manage your eDiscovery data
   - **https://www.googleapis.com/auth/devstorage.read_only**
     BigQuery API | .../auth/devstorage.read_only | View your data in Google Cloud Storage
   - **https://www.googleapis.com/auth/admin.directory.user.readonly**
     Admin SDK API | .../auth/admin.directory.user.readonly | See info about users on your domain
   - **https://www.googleapis.com/auth/admin.directory.group.readonly**
     Admin SDK API | .../auth/admin.directory.group.readonly | View groups on your domain



4. Click **Update**.
5. Click **Save**.

Your data access changes are then saved.

9.1.5 Create credentials

Next, create credentials.

1. In the Google Cloud Console (https://console.cloud.google.com/), navigate to **APIs & Services > Credentials**.
2. Click **Create Credentials**.
3. Click **OAuth Client ID** credentials.
4. 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 (Uniform Resource Identifier) based on the Relativity aiR Data Center Geo you intend to run collections from.

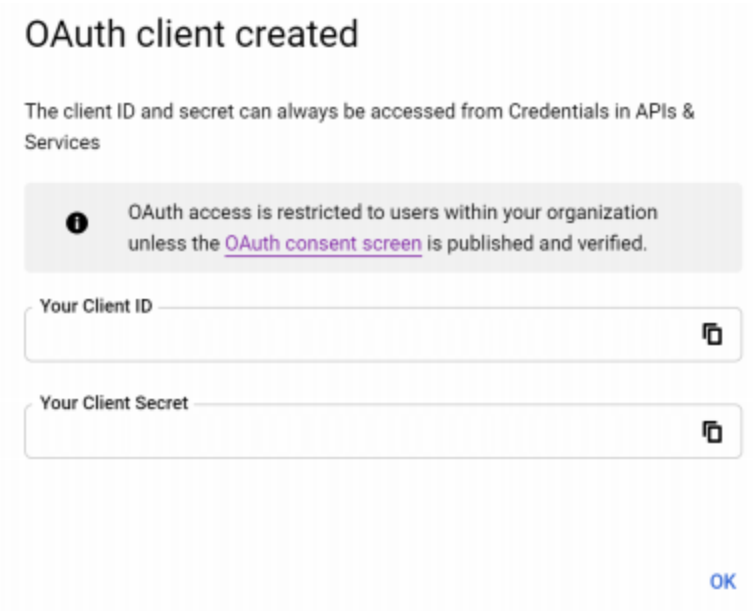
Note: When copying and pasting the URI, please ensure there are no whitespaces or typos in the address, as they will cause a connection failure with Google.

Relativity aiR 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.noeu.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.jpes.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 to which your Relativity aiR tenant is assigned. Contact Relativity Support to confirm which URI to use.
    - **Relativity aiR pod esus025000**—
        - https://services.esus.relativity.one/collect-oauth-authorization/index.html
    - **Relativity aiR pod esus025064**—
        - https://services-02.esus.relativity.one/collect-oauth-authorization/index.html
    - **Relativity aiR pod esus025128**—
        - https://services-03.esus.relativity.one/collect-oauth-authorization/index.html
    - **Relativity aiR pod esus025192**—
        - https://services-04.esus.relativity.one/collect-oauth-authorization/index.html
    - **Relativity aiR pod esus008064**—
        - https://services-05.esus.relativity.one/collect-oauth-authorization/index.html
    - **Relativity aiR pod esus022064**—
        - https://services-06.esus.relativity.one/collect-oauth-authorization/index.html
    - **United States (Government)**—
        - https://services.vaus.relativityone.us/collect-oauth-authorization/index.html

5. Click **Create**.

After clicking Create, you will have your Client ID and Client Secret. Copy both of them, because you will need them later when creating the Google data source in Collect.



9.1.6 Set reauthentication policy

In this required step, you must configure Google's reauthentication policy as follows:

1. Open the Google Cloud console (https://admin.google.com/ac/home).
2. Select the newly created project.
3. Click on the Navigation menu.
4. Select **Security > Access and data control > Google Cloud session control**.
5. On the Google Cloud session control, select a reauthentication policy.
    - **Never require reauthentication**
    - **Require reauthentication**. If you select Require authentication, you must also select **Exempt Trust apps**.
6. Click **Save**.

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

9.2 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.

9.2.1 Create admin role for Vault API

To create the admin role for the Vault API:

1. Open the Google Admin page (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**.

9.2.2 Create admin role for the user accounts listing

To create the admin role for the users accounts listing:

1. Open the Google Admin page (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**.

9.2.3 Create admin role for the groups listing

To create the admin role for groups listing:

1. Open the Google Admin page (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**.

9.2.4 Enable required privileges

To enable required privileges:

1. Open the Google Admin page (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. Click the **Admin roles and privileges** pane.
5. In the Roles section, click the **edit pencil icon**, or anywhere in the Roles tables.
6. Assign the following roles to the user in All organizational units scope.
    - Relativity Collect
    - Users Reader for Collect
    - Groups Reader for Collect

9.3 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.

9.3.1 Create an organizational unit

An organization unit restricts Relativity aiR'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 the Google Admin page (https://admin.google.com/ac/home).
2. Navigate to **Directory > Organizational Units**.
3. On the *Manage organizational units* page, click **Create organization unit**.
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 is not 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.

9.3.2 Add users to the organization 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 the **More options** drop-down menu.
5. Click **Change organizational unit.**
6. In the Change organizational unit pop-up menu, select appropriate organizational unit.

7. Click **Continue**.
8. Click **Confirm**.

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

9.3.3 Scope user privileges to the organizational unit

To update the scope of the user's role:

1. Open the Google Admin page (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 and privileges** pane.
5. Click the pencil icon.
6. Select a **Role name** to update.
7. Edit the scope of the role to the appropriate organization unit.
8. 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.

9.4 Google data sources

Once you complete setting up a Google admin and user account, you can configure Google data sources in Relativity aiR.

Once in Relativity aiR, you can connect the following Google data sources:

- **Workspace**—this includes Google Chats, Drive, Gmail, and Groups. For more information, see Google Workspace data source below.
- **Gemini**—this is Google's generative AI tool. For more information see Google Gemini data source on page 46.

10 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.

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see Terms of Use.

10.1 Considerations

Consider the following items about this data source:

- This connector requires a Google Workspace Enterprise Plus license with Vault enabled.
- Each user account you collect from must also have a Google Vault license assigned.

- Collection of Calendar is currently unsupported.
- Google allows a maximum of 20 simultaneous Vault exports per organization.
  - Running more than 20 target collections at the same time can lead to export failures on Google's end.
  - For more details, refer to Manage exports.
- 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.

10.1.1 Grouped collection

Google Chat data is collected into grouped collections. Chat conversations often include multiple custodians in the same message threads or channels. Relativity collects this data as a single grouped data set rather than splitting messages by individual custodian.

For more information on grouped collections, see Grouped collections on page 58.

10.2 Collection size

Google Workspace collections can be large. When collection jobs become too large, performance decreases.

10.2.1 Chat

Chat collections grow quickly due to conversational density, especially in active organizations.

Category	Details
Hard limits (enforced)	30 custodians per job
Planning thresholds (guidance)	Long chat histories become large quickly
When to split	Long date ranges in active orgs
Notes	Collected as RSMF

Limit date ranges for active tenants to prevent rapid growth in job size.

10.2.2 Drive

Drive performance depends more on folder structure than raw data size.

Category	Details
Hard limits (enforced)	30 custodians per job
Planning thresholds (guidance)	Deep folder trees scale poorly
When to split	Large or complex folder structures
Notes	Data shape > raw size

Prioritize simplifying folder scope. Complex hierarchies should be split or targeted.

10.2.3 Gmail

Gmail collections are heavily influenced by Vault export behavior, particularly for long historical ranges.

Category	Details
Hard limits (enforced)	30 custodians per job
Planning thresholds (guidance)	Greater than 15 custodians and greater than 3 years commonly slows exports
When to split	Multi-year collections
Notes	Vault export behavior dominates

Expect slower exports for large historical scopes. Split primarily by time range.

10.2.4 Groups

Groups behave similarly to chat-based sources, especially in high-traffic environments.

Category	Details
Hard limits (enforced)	30 custodians per job
Planning thresholds (guidance)	High-traffic groups over long periods
When to split	Long time windows
Notes	Similar to chat-style sources

Split collections based on traffic volume and duration to control size.

10.3 Create the data source in Collect

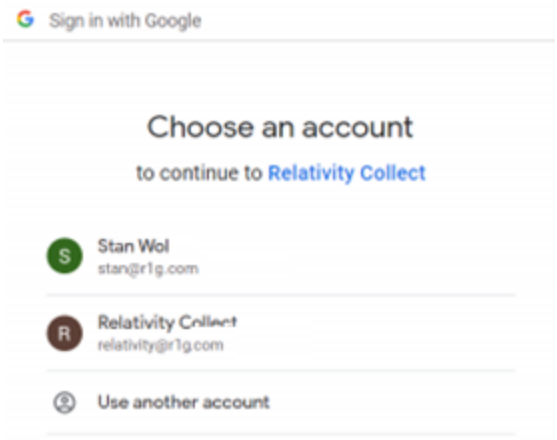
After completing the steps covered above for Google Workspace account setup and user account setup, you can then configure your first Google data source in the Relativity aiR Collect application.

Caution: After generating the Refresh Token in Step 10 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 in Relativity aiR:

1. Navigate to **Collection Admin** within Collect Admin of Set Up.
2. Click the **New Collection Source Instance** button.
3. In the Data Source Information pane, do the following:
   - **Name**—enter in a unique name for the data source.
   - **Type**—select a **Google Workspace** data source. Chat, Drive, Gmail, or Groups.
4. In the Settings pane, enter the **Client Id** and **Client Secret** copied from Google's OAuth2 credentials page. For more information, see Google Workspace data source on page 36.
5. Click **Generate Code**.

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



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

10.4 Configure the data source in Collect

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.
- **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**.

Details 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.

- Google Groups on the next page
- Gmail on page 41
- Google Drive on page 44
- Google Chat on page 45

All dates are in Coordinated Universal Time (UTC).

10.4.1 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.

Groups criteria

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 Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
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 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	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.

Criteria	Operators	Description	Example
	Equals		
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 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 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.

10.4.2 Gmail

Setting criteria for Gmail 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.

Gmail criteria

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 Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
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 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	If you mark toggle the Value setting On, your results include all messages that include an attachment.

Criteria	Operators	Description	Example
		search returns emails with or without attachments based on the Value setting.	
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'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.
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.
    - If you are using keyword search criteria, we recommend enabling the toggle, regardless of keyword search results.
    - 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.
        - **Enabled**—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 the following:
            - Emails with keywords in the body.
            - Emails within the specified date range.
            - Emails with attachments within the date range.
        - **Disabled**—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.

- **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.

10.4.3 Google Drive

Setting criteria for Google Drive is not required. For more information on Advanced examples, see Google Workspace documentation.

Note: Google Vault API usage limits do not permit more than 20 exports to be in progress simultaneously across your *entire* organization. If you have very large matters and need the maximum to be increased, contact Google for assistance. For more information, refer to Google Vault documentation on usage limits and usage quota increases.

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.

Drive criteria

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 Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
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.
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	If you search "ExampleUser1," your results include all filed shared by people with the

Criteria	Operators	Description	Example
		Shared By property in a query, the search returns all files that contain the text in the Shared By field.	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.

10.4.4 Google Chat

Setting criteria for Google Workspace Chat is not required. For more information on Advanced examples, see Google Workspace documentation.

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

Chat criteria

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 Google Workspace documentation.	For more information on Advanced examples, see Google Workspace documentation.
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,	When you use the Sent/Updated property in a query, the search	If you search “Greater Than 1/1/2001,” your results include all messages sent after Janu-

Criteria	Operators	Description	Example
	Less Than, Less Than or Equals	returns all messages that equal/-doesn't equal, greater/less than the date entered.	ary 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 Spaces**—enable this toggle to include all messages in spaces, 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.

  Note: Relativity provides you win .json files when running collections with this toggle enabled.

10.5 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.	Your token is invalid. This could be due to changing the account owner.	While signed in with your account, navigate to https://myaccount.google.com/u/0/permissions. In the page, click **Remove Access**. Then generate a new refresh token. For more information on generating a refresh token, see Google Workspace data source on page 36

11 Google Gemini data source

This topic provides details on how to capture Google Gemini chat data with Collect.

Relativity aiR collects Gemini Chat data and automatically converted to Relativity's short message format (RSMF).

Note: This documentation contains references to third-party software, or technologies. While efforts are made to keep third-party references updated, the images, documentation, or guidance in this topic may not accurately represent the current behavior or user interfaces of the third-party software. For more considerations regarding third-party software, such as copyright and ownership, see Terms of Use.

11.1 Considerations

Note the following considerations about this data source:

- This connector requires a Google Workspace Enterprise Plus license with Vault enabled.
- Each user account you collect from must also have a Google Vault license assigned.
- Gemini conversations are retained and made accessible based on your organization's Vault retention policies.
- This connector collects Google Chat messages, including Gemini-enhanced threads, through the Google Vault API.
- Google allows a maximum of 20 simultaneous Vault exports per organization. Running more than 20 target collections at the same time can lead to export failures on Google's end. For more details, refer to Manage exports.
- If your organization uses multiple Google Workspace domains or organizational units, you must configure a separate data source for each in the Collect application. We recommend that you clearly name each data source to identify the workspace it is connecting to.
- Relativity supports both persistent and ephemeral conversations, provided they fall within the configured retention window in Vault.
    - Ephemeral conversations are those where messages are not retained in the user's chat history but are accessible with the Vault API.
    - These are returned in Collect if Vault retention is enabled and search filters align with message dates.

11.2 Advanced Gemini features

Several advanced Gemini features are not currently included in Vault exports. This means they will not be seen in our RSMF output.

These limitations are inherent to Google's current export behavior and not Collect-specific.

Currently, in some cases, Google Vault exports may include placeholder links, or immersive chips, for these features.

- When the immersive chips are available, Relativity inserts a Gemini Content Description based on the accompanying summary text provided by Google.
- This content description offers limit context and does not include full visual or interactive content.

Google has indicated that there will be support for these features in the future.

The advanced features include:

- Canvas
- Deep Research responses
- Uploaded images
- Citations
- Custom assistant names
- Annotation metadata

11.3 Prerequisites

You must set up and configure a Google Cloud project before creating the data source in Relativity aiR. For more information, see Google on page 28.

Complete the following before setting up a Google Gemini data source in Relativity:

- Set up a Google Cloud project and enable the following APIs:
  - Google Vault API
  - Admin SDK API
  - Generate OAuth 2.0 credentials:
  - Client ID and Client Secret
- Grant the required access scopes during OAuth configuration:
  - https://www.googleapis.com/auth/admin.directory.user.readonly
  - https://www.googleapis.com/auth/ediscovery
- Confirm that target user accounts and chat spaces are covered by an active Vault retention policy.

For detailed steps, see Google on page 28.

Once you complete the prerequisites, you can begin creating the data source.

11.4 Collection size

Gemini is a newer source with evolving performance patterns, particularly for long interaction histories.

Category	Details
Hard limits (enforced)	No explicit hard cap published
Planning thresholds (guidance)	High interaction volume over long periods
When to split	Long-running interaction history
Notes	Newer source with evolving behavior

Use conservative scoping until performance characteristics are better established.

11.5 Create the data source

Use the following procedure to connect the Google Gemini data source to Collect.

In Relativity aiR:

1. Navigate to **Collection Admin**.
2. Click the New Collection Source Instance button.
   1. **Name**—enter a unique name for the data source.
   2. **Type**—select the Google Workspace data source.
   3. **Settings**—enter the required information in the Settings fields. For more information, see Settings fields on the next page.
3. Click **Save**.

The data source displays on the Collection Admin page.

11.5.1 Settings fields

To connect Relativity to a Google Gemini workspace, you need to gather and enter the information for the following fields.

- **OAuth Client ID**—enter the client ID created in your Google Cloud project.
- **OAuth Client Secret**—enter the client secret linked to the above client ID.
- **Super Admin Email**—enter the email address of a super admin account in your Google Workspace domain. This enables user impersonation for Vault access.

Note: You must complete OAuth app setup in your Google Cloud console and approve domain-wide delegation before using these credentials.

11.6 Configure the data source in Collect

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.
- **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**.

All dates are in Coordinated Universal Time (UTC).

Criteria	Operators	Description	Example
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.	When you search a Start Date of 1/1/2024, Relativity collects all messages from that date to today.
End Date	Less Than or Equals	When you use the End Date property in a query, the search returns messages that exist the day of and before the entered date.	When you search an End Date of 1/31/2024, Relativity collects messages from the beginning of time through that date.
Custodian Email	Equals	Filters for messages involving the specified user's email address.	Messages sent or received by user-@company.com are included.
Conversation ID	Equals	Filters for a specific conversation or message thread in Gemini Chat.	Collects messages associated with conversation ID 17:abc123xyz456....
Workspace ID	Equals	Filters messages within a specific Google Chat space, room or group chat.	Collects from the space with ID spaces/AAAAB3NzaC1yc2....
Keyword	Contains	Filters for messages containing one or more specified search terms or phrases.	"project launch" OR "contract signed"

Note: Temporary, or ephemeral, chats will also be returned if they occurred within the Vault retention window and meet your search criteria.

12 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 62.

12.1 Considerations

Before creating a collection for any data source, consider the factors that can affect collection performance.

- Collection time can increase when you use:
  - Large date ranges.
  - A high number of custodians.
  - Multiple collections running at the same time.
- Combining large scopes with high concurrency can slow down collections. This behavior is expected across all data sources.
- When you migrate a Collect workspace, data source credentials do not move with the workspace. You must re-enter credentials before running new Collect jobs. For more information, see Migrate.

12.2 Best practices for time-sensitive collections

To improve performance and reduce collection time:

- Use smaller date ranges whenever possible.
- Limit the number of custodians included in each collection.
- Reduce concurrency, or run collections sequentially when appropriate.
- Create multiple collection jobs when necessary.

Following these practices can help collections complete more quickly and predictably.

12.3 Creating a collection

Before you begin creating a collection, make sure to create a matter. For more information, see Matters on page 10.

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 56.

12.4 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. Relativity auto-saves your information when moving between steps. If any required information is wrong or missing, an error message displays and you cannot move to the next step.

12.4.1 Collection Details

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

- **Name**—the name of the collection. 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 10.
- **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. All data sources that produce RSMF have a limit of 2 GB. For more information, see Processing documentation.
- **ZIP Collected Files**—toggle on to compress all collected data into ZIP64 formatted containers. 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 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 Staging Explorer.
    - Google compresses the data on their end and they exclude Google data from the ZIP64 formatted containers.
- **Zip Password**—enter a password that is required by anyone attempting to decompress the ZIP64 container files.
    - If you have Processing installed in the workspace, Collect automatically populates the Processing Password Bank with the password so it is available at the time the collection is processed.
    - Click the Show Password box to display the actual password in the field to ensure the characters are correct.
    - Zip is supported by Microsoft 365, Slack, and X1. Google is exported as pre-zipped.
- **Enable Auto-Processing**—toggle on to enable auto-processing. If enabled, select the workspace, profile, and document prefix. Relativity processes all data in a completed collection, or completed with errors collection, after a collection finishes.
    - **Workspace**—select a workspace within your instance to use when creating a processing job.
    - **Processing Profile**—select a processing profile available in the drop-down menu. The available profiles are from the selected workspace.

- **Document prefix** —select the document prefix option of *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.

- **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 15.

12.4.2 Data source

Configure the data sources chosen in the Collection Details step. Each data source has different criteria to enter. See the list of data source types under Data sources on page 14 for information on each one.

You can select multiple data sources in the first step if you want to configure all or multiple sources in the step. Switch between each source to configure its criteria by using any of these methods:

- Click the name of the data source in the navigation menu.
- Click **Next** and **Previous** to move you through the data sources.
- Select individual data sources by clicking on the checkbox and then using the right arrows to select them.

12.4.2.1 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.
- **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.

Note the following about criteria:

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

12.4.3 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. Select a checkbox next to a custodian.

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

   - Collect supports up to 30 custodians, or entities, assigned in a collection job.
   - If you need more than 30 custodians, you need to create another collection job.
   - This limit only applies to the number of custodians.
   - There is no limit to the number of targets to be collected.
   - For example, you can select 30 custodians and three data sources for a total of 90 targets for the collection job.
3. Click the right arrow icon to add select custodians. Click double right arrow icon to add all custodians.
4. Click **Next**.

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

12.4.4 Non-custodial

Select non-custodial data sources to complete this step. Non-custodial data means you select the specific locations or archives you want to collect from. Selecting custodians is not required.

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, select the check boxes next to the sites you want to collect.
   1. **Smarsh**—Smarsh organizes data into cases. Select the cases you want to collect from. Collect only supports collection jobs of one case for Smarsh.
3. (Optional) Toggle on the **Show selected only** option to display only the locations selected for collection. The selected locations display in a concise list for review before you proceed to the Summary step.
4. Click **Next**.

12.4.5 Collection Summary

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

If Google Workspace custodian targets were not created before you started the project, click **Generate Targets**.

Click **Generate Targets** to check if targets exist for the custodians you have selected for collection. If the targets do not exist, Collect automatically creates them based on the email address contained in the Entity record for each custodian.

12.4.5.1 Targets

In the Targets section, a number appears next to each custodian's name. The number listed is the number of custodian targets found in the associated data source.

Number	Meaning
0	Collect did not find any custodian targets with that email address in that data source.
1	Collect found a single custodian target associated with the email address within the data source.
2+	Collect found multiple custodian targets with that email address within the data source.

The number is also color-coded to indicate how the target was generated:

- **No highlight**—Collect already found and generated the custodian target.
- **Green**—Collect autogenerated the custodian target.
- **Red**—Collect could not autogenerate the custodian target.
  - You can still manually generate it.
  - For more information, see Creating a custodian target on page 13.

Click **View Collection Details** to finish setup. The Collection Details page appears. From the Collection Details page, you can preview and run the collection from the Collection Summary on the previous page.

13 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.

13.1 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, use the buttons at the top of the page to edit, delete, go back, edit permissions, or perform other collection tasks. Editing a collection takes you to the first step in the wizard. For more information, see Using the Collect wizard on page 50.

Note: Once a collection has started, the collection details are read-only and cannot be changed.

- **Collection Details**—displays 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.
  - **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 this box is checked.
- **Zip Password**—the password that everyone needs to use to decompress the ZIP64 container files.
- **Receive Email Notifications**—if you toggled on to send or receive collection job status emails this checkbox is checked.
- **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 tasks listed. See Collect console on the next page.
- **Data Sources**—lists all the collection activities associated with this collection.
  - **Custodian**—the custodian associated with the collection.
  - **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 63.
    - **Failed**—the collection failed. For more information, see Reports on page 62.
  - **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.

    Note: 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 the Errors report on page 63.

    Note: 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 Viewing or editing Collection data on the previous page.

- **Custodian Details**—the status of the custodian and the source instance. This card also includes the filter criteria, items, size, and errors.

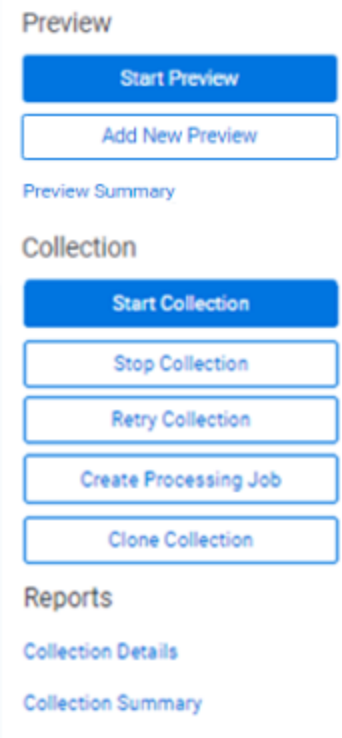
13.2 Viewing collected data

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, and 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.

13.3 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.



13.3.1 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.

13.3.1.1 Start Collection

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

13.3.1.2 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.

13.3.1.3 Retry Collection

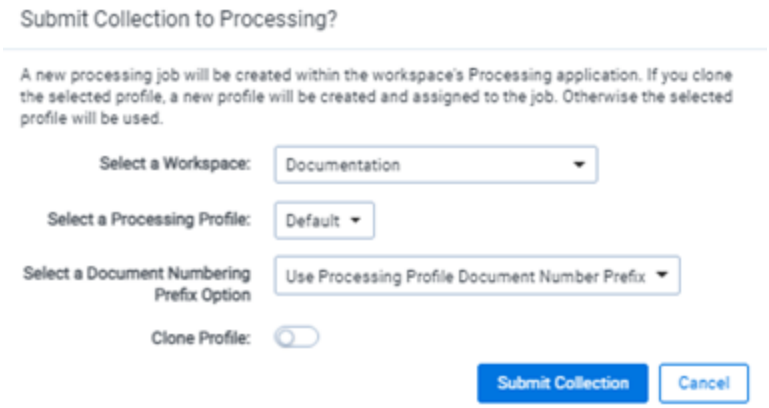
The Retry Collection button is only available when a collect job does not complete because of errors. Click **Retry Collection** to start another collect job that only retries the targets that have failed. You cannot retry targets that completed successfully.

13.3.1.4 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.



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.

13.3.1.5 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.

13.3.1.6 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 page 62.

13.4 Delete collections

A collection will not delete if they have an existing custodian tied to it.

When you delete a collect job, Relativity deletes all of the related custodian targets for the job. The custodian targets table remain the same. The targets within Custodian Targets are not related to any specific collect jobs. Relativity creates job-specific copies of the custodian targets for the job when it's created.

14 Grouped collections

A grouped collection means that all conversations for the selected custodians are combined into a single set of RSMF output files.

This approach is used to:

- Minimize collection size
- Prevent duplicate conversations

If each custodian were collected separately, any shared conversations, such as direct messages, group chats, or shared channel content, would be collected multiple times. This would:

- Increase the overall data volume
- Expand storage requirements
- Require additional downstream deduplication effort during processing and review

14.1 Grouped data sources

Within Collect, there are short message data sources that Relativity collects in a grouped format when more than one custodian is selected.

Grouped collection data sources:

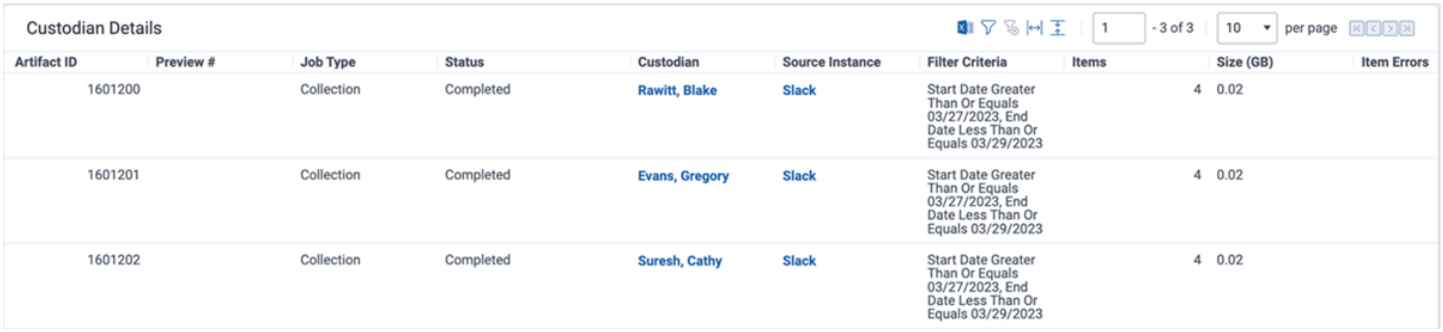
- Microsoft 365 Teams
- Slack
- Google Chat

14.2 Grouping messages

Grouping ensures that shared content is collected once. This helps reduce duplicates and keeps the dataset consistent.

When viewing grouped collection results on the Collect job details page, the reported artifacts collected and collection size show the same value for all involved custodians. This reflects that there is one collection of RSMFs containing all chats for the collected custodians.

The reported *Items* collected is the number of RSMF files that were generated during the collection. We currently do not support reporting the number of individual messages attributable to each custodian independently. The reported *Size (GB)* represents the aggregate size of all generated RSMF files.



Custodian Details

1 - 3 of 3 | 10 per page

Artifact ID	Preview #	Job Type	Status	Custodian	Source Instance	Filter Criteria	Items	Size (GB)	Item Errors
1601200		Collection	Completed	Rawitt, Blake	Slack	Start Date Greater Than Or Equals 03/27/2023, End Date Less Than Or Equals 03/29/2023	4	0.02	
1601201		Collection	Completed	Evans, Gregory	Slack	Start Date Greater Than Or Equals 03/27/2023, End Date Less Than Or Equals 03/29/2023	4	0.02	
1601202		Collection	Completed	Suresh, Cathy	Slack	Start Date Greater Than Or Equals 03/27/2023, End Date Less Than Or Equals 03/29/2023	4	0.02	

14.3 Custodian assignment considerations

Grouped collections create a limitation during processing because the Processing capability supports only one custodian per processing set data source.

Relativity assigns an Entity representing the data source as the custodian for the processing set when using *auto-processing* or the *Create Processing Job (on-demand)* feature in Collect.

This prevents the system from applying a single custodian to the entire RSMF dataset, which would incorrectly suggest all messages belong to one person.

14.4 Manual processing guidance

When manually creating a processing set, you encounter the same limitation of needing to assign a single custodian to the grouped RSMF data.

Recommended approach:

- Create or use an Entity of type *Other*
- Name the Entity to clearly represent the data set

Example: *Slack – Acme Matter – 2026-02-10*

This approach accurately reflects that the data set represents multiple custodians and maintains consistency with Collect's automated processing behavior.

15 Migrate Collect workspaces

When you migrate a Collect workspace, using *Archive, Restore, and Migrate (ARM)* or *Integration Points*, Relativity moves workspace data but does not move data source credentials.

After the migration, you must re-enter credentials before you can run Collect jobs.

Note: This behavior applies to all Collect data sources.

15.1 Migrate Collect workspaces

You can migrate Collect workspaces using ARM or Integration Points.

During a migration:

- Relativity restores the Collect workspace and its objects.
- Relativity does not restore data source credentials.
- Data sources appear in the restored workspace but are not connected.

Relativity does not provide a supported way to move or copy Collect credentials. This protects sensitive authentication information.

15.2 Credentials do not migrate

To protect from compromising sensitive authentication information, Relativity does not support moving or copying Collect credentials from migration.

15.3 After migration

Until you re-enter credentials, Collect cannot access the data sources.

After a migration:

- Data sources appear in the restored workspace.
  - The credentials will not work.
  - The connections are invalidated.
- You must re-enter the credentials for each data source and revalidate each data source.
- New collection jobs cannot be run until the data sources are connected again.

Note: You do not need to remake the credentials for the data sources. If the existing credentials are still valid you need to re-input.

15.3.1 Considerations

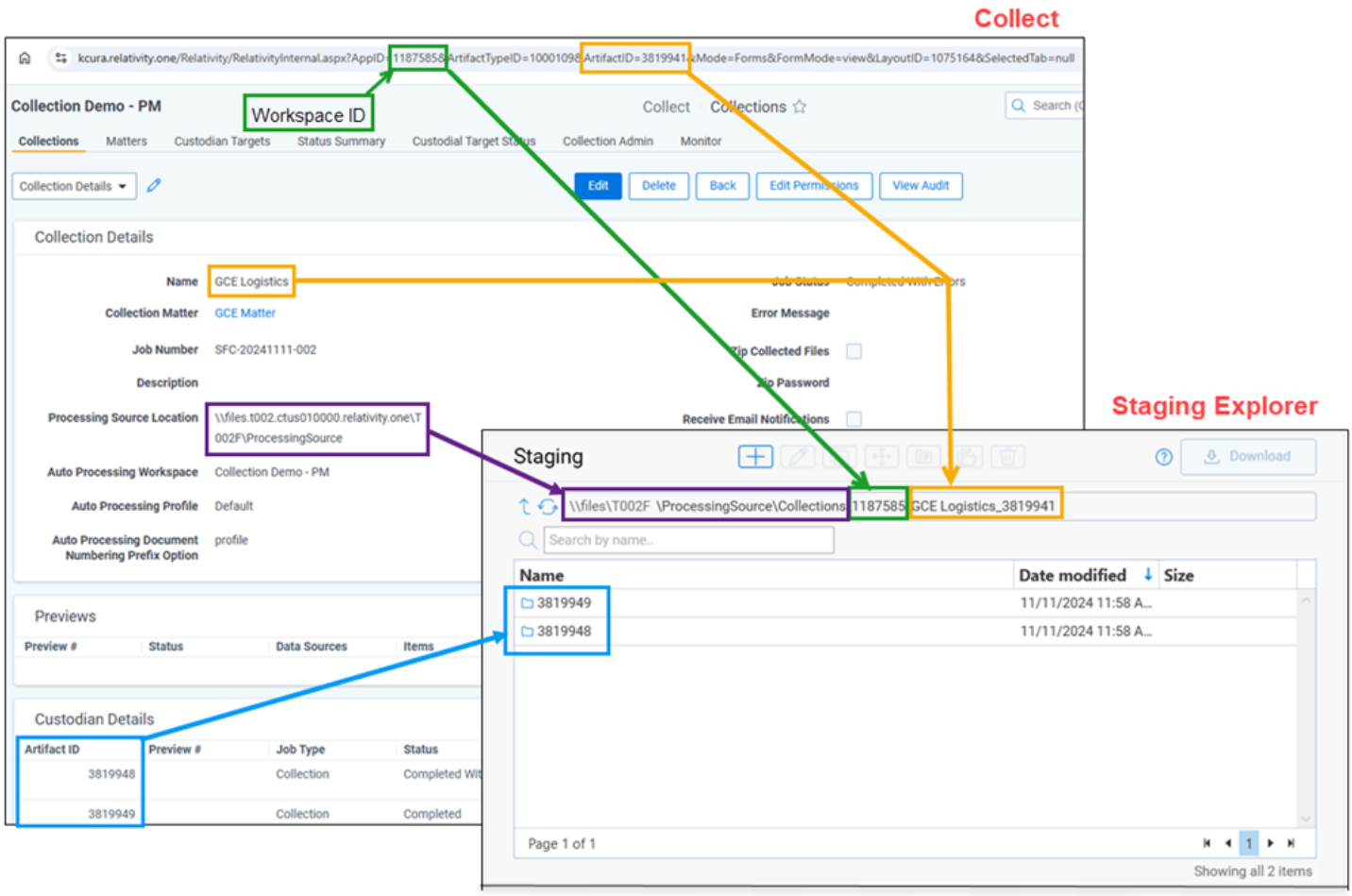
Consider the following when using Microsoft or Google:

- **Microsoft 365**—the app created for Microsoft 365 data sources has a secret value which is only exposed on initial creation.
  - This secret value must be stored and re-entered correctly for the data source to work.
  - If the Secret Value is forgotten, please generate a new secret value.
- **Google**—for Google data sources, a refresh token is generated on the first Google data source that was set-up and used for subsequent Google data sources.
  - This refresh token value must be stored and re-entered in the data sources in order for the data sources to work.
  - If the token is invalidated or forgotten, please see Troubleshooting for instruction on generating a new refresh token.

16 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>_<CollectionArtifactID>\<DataSourceArtifactID>

- 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\T002F\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: kcur-a.relativity.one/Relativity/RelativityInternal.aspx?AppID=**1187585**...

  \\files\T002F\ProcessingSource\Collections\1187585

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

  \\files\T002F\ProcessingSource\Collections\1187585\GCE Logistics_3819941

- The Artifact ID of the data source used becomes the sub-folder. Using the above example, they would be:

\\files\T002F\ProcessingSource\Collections\1187585\GCE Logistics_3819941\3819948
\\files\T002F\ProcessingSource\Collections\1187585\GCE Logistics_3819941\3819949

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

\\files\T002F\ProcessingSource\Collections\1187585\GCE Logistics_3819941\Teams

17 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.

17.1 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.

Note: All report timestamps are in UTC.

17.1.1 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 date that is greater than or equal 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.

17.1.2 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.

17.1.3 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 an XML file download of the results collected from a Google target.

17.1.4 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.

17.1.4.1 Errors.csv

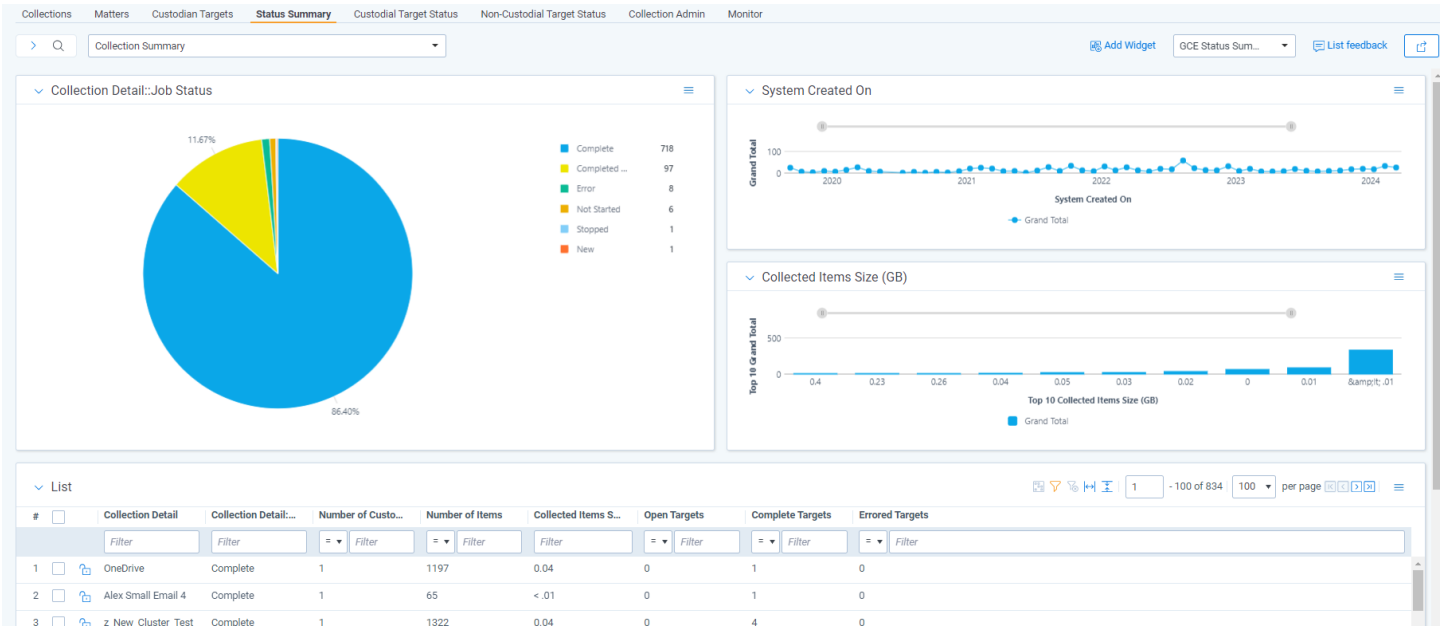
The report file lists one error per line. Each item is listed with an error ID alongside the message of the error that caused the item failure. Per-item errors only occur in the download phase of the collection; if an error occurs before (for example, if data is unavailable during our check) or after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

18 Status Summary

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

18.1 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.



18.2 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 53. Once you generate targets, the dashboard organizes by collection jobs.

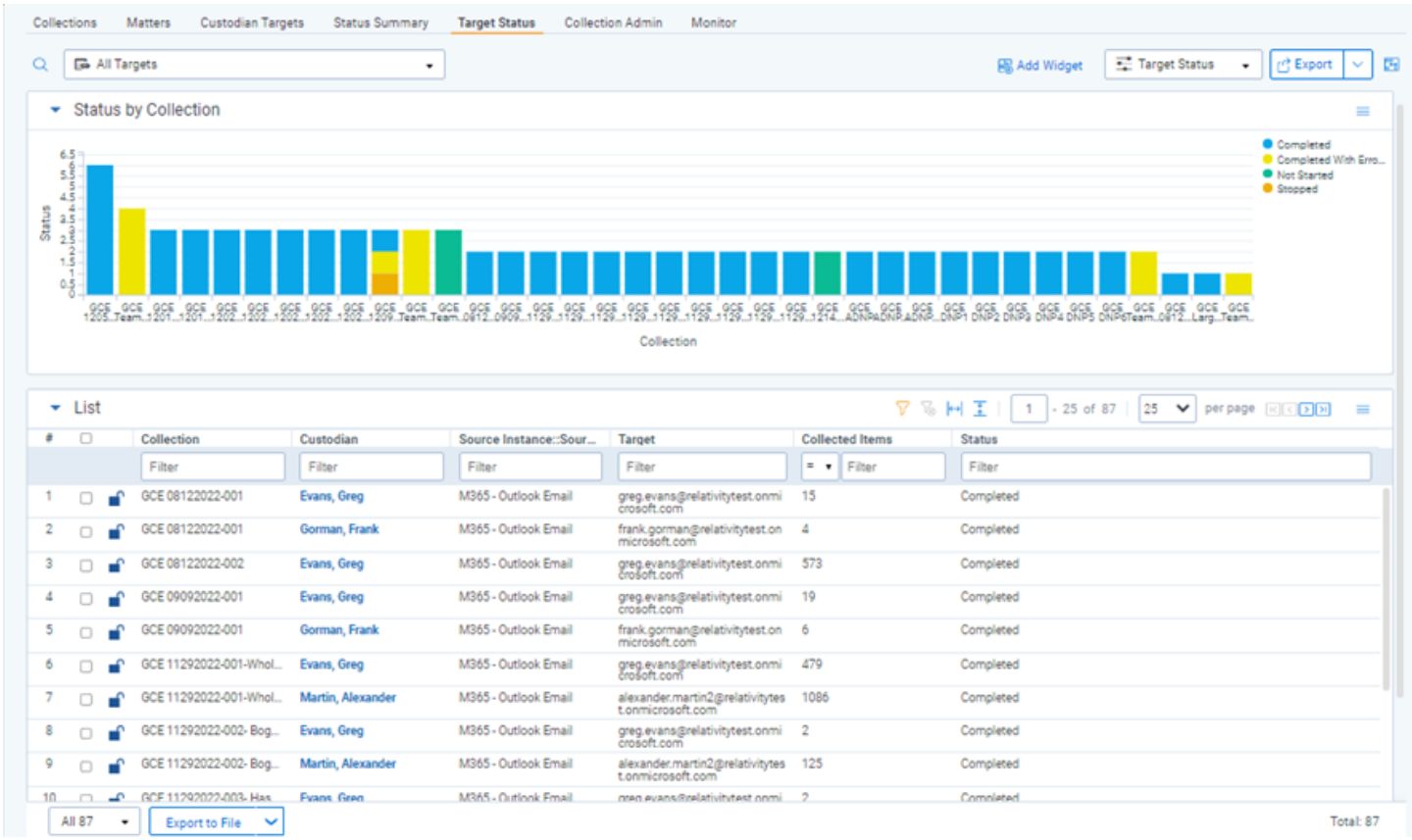
Status:

- **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 the previous page.
- **Error**—the collection did not run successfully and couldn't collect from the target.

19 Target Status

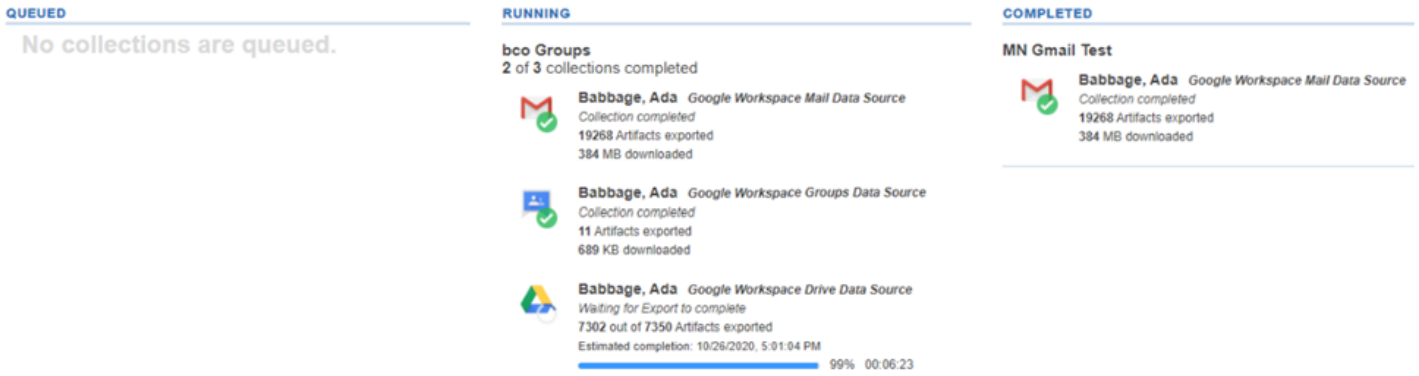
The Target Status tab is a dashboard to see the statuses of collections. You can drill into each target from this dashboard. Able to look into the targets by custodian, data sources, or status to find out more about your collections. Focus on the collected components with this dashboard.



20 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.

- **Queued**—this column lists the created collect jobs that have not started.
- **Running**—this column lists collect jobs in progress and with their current progress displayed in a status bar.
- **Completed**—this column lists collect jobs completed successfully, completed with errors, the amount of data collected, and the elapsed time.


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

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