Collect quick reference guide

This document contains step by step guidance to setup Collect in your workspace to collect data from various cloud-based data sources.

Step 1: Installation

The Collect application is available to all the Relativity aiR clients to download and install from the Application Library.

To install the workspace in specific workspace:

1. Open the workspace.
2. Go to **Relativity Applications**.
3. Click **New Relativity Application**.
4. Select **Application Type - Select from Application Library**.
5. Select **Choose from Application Library - Collect**.
6. Click **Import**.

Step 2: Obtaining data source configuration information

Collect currently supports the following cloud-based data sources. Each data source requires specific configuration information that needs to be obtained from your data source administrator. This information is used for setting up the data source in Relativity in the next step.

Based on the data source you intend to collect, please obtain the corresponding pieces of information from your data source administrator.

Sr	Data Source	Required configuration information
1	Microsoft 365 Mail	1. Domain 2. Application ID 3. Application Secret
2	Microsoft 365 OneDrive	
3	Microsoft 365 Contacts	
4	Microsoft 365 Calendar	
5	Microsoft 365 Teams	
6	Microsoft 365 Archived Mail	
	Microsoft 365 SharePoint	

Sr	Data Source	Required configuration information
7	X1 Emails	1. X1 Enterprise Manager Endpoint URL 2. X1 Enterprise Manager Endpoint Port 3. X1 Downloader API Endpoint URL 4. X1 Downloader API Endpoint Port 5. Client ID 6. Client Secret 7. Project ID 8. Project Path 9. Target External ID 10. Certificate Thumbprint
8	X1 Files	
9	Slack	1. Temporary Code 2. Access Token
10	Google Mail	1. Temporary Code 2. Client ID 3. Client Secret 4. Refresh Token
11	Google Chat	
12	Google Drive	
13	Google Groups	
14	Bloomberg Chat	1. Host 2. Path 3. Username 4. Password 5. Pass Phrase 6. PGP Key
15	Bloomberg Email	
16	Box	1. Client ID 2. Client Secret 3. Public Key ID 4. Private Key 5. Passphrase 6. Enterprise ID
17	iManage	1. Client ID 2. Client secret 3. Username 4. Password

Sr	Data Source	Required configuration information
		5. Library ID 6. iManage Base address
18	Refinitiv Eikon	1. Host 2. Port 3. Path 4. Username 5. Password
19	ChatGPT	1. API Key 2. Workspace ID
20	Cellebrite	1. Client ID 2. Client Secret 3. Relativity Domain 4. API Key 5. API User Name 6. API URL

Step 3: Setting up Relativity

Setting up Relativity involves setting up an entity, a collection source, and a matter

Setting up entity

Entities can be set up manually or with the Import/Export using a load file, if the list of entities is known beforehand

To set up entities manually:

1. Go to **Entities** tab.
2. Click **New Entity**.
3. Provide key information like First Name, Last Name, Email, etc., for each custodian requiring data collection.

Setting up collection source

The collection source needs to be setup for each data source individually. Following the set up any number of Entities in that Domain can be collected.

To set up Collection Source Instance:

1. Go to **Collection Admin** tab.
2. Click **New Collection Source Instance**.
3. Enter a Name for the source.
4. Select the data source type.

5. Provide the configuration information received from Step 2.
6. Click **Save**.

Repeat the process for other data sources requiring collection.

Setting up collection matter

Please note that this collection matter is different than the matters we use when setting up new workspaces. This collection matter is specifically used in the context of the Collect app within the current workspace only.

To set up a new collection matter:

1. Go to **Collect > Matters**.
2. Click **New Collection Matter**.
3. Provide key information.
4. Click **Save**.

Step 4: Collect using wizard

Following the completion of the previous steps we are ready to kick off the collection job using the Collection wizard.

Setting up a new Collection job

- Go to the **Collect > Collections** tab.
- Click **New Collection** to open the Collect wizard.

Providing basic configuration information

- **Name**—use your preferred Naming convention. This will make it easy to sort and filter collections quickly and easily. This is also the name of the top folder in the storage location.
- **Collection Matter**—select from the list of pre-configured matter or set up new Matter on the fly.
- **Processing Source Location**—this is where a collection is stored. This would be configured to your Processing source location.
- **Notifications**—set the slider to turn on the notifications. See that it sets the email of who is logged in to Relativity.
- **Zip Collected Files**—allows you to zip the collected data if you are collecting the data for alternative use cases like Preservation or you might need to download the data to physical disks for transfer.
- **Zip Password**—if required you can protect the zipped data by encrypting the Zip container with a password.

There are additional fields like Job Number, Description, and others that can be helpful to make notes or store additional info related to the collection.

Selecting the data source

Select the data sources that you would like to Collect the data from and click **Next**.

Selecting the entities

Select all entities that you would like to Collect the data for from all the above selected data sources and click **Next**.

Applying criteria and filters

Each of the selected data sources will be presented in the right pane. Sequentially configure the filtering criteria for each of the data sources and click **Next**.

Criteria and filters considerations

For Microsoft 365 data sources, the system internally uses Microsoft's Graph API. Thus, the filtering options are restricted to only those options that are supported by the Graph API.

- For Calendars having a start and end date is required.
- For Contacts, its either or ALL or NONE. All is selected by default.
- For Mailbox and OneDrive operators differ based upon the data source selected.
- Keyword search with terms uses wildcard after term. Searching for the term Work will result in documents containing workday, workout, working etc.

For the Slack data source, applying Start and End date criteria is mandatory.

- However, how far back Relativity can collect will depend upon Slack Enterprises retention policy.
- Conversations in public and private channels are collected for each day in the date range regardless if the custodian participated in that channel on the given day or not.

For X1 and Google data sources, setting criteria is not required. However, there are various options for culling the data before starting the collection.

For Bloomberg, Box, and Refinitiv Ikon data sources, setting the start date and end data criteria is not required.

For iManage data sources, setting criteria is not required. If you have not selected criteria, all results will be collected by default.
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Viewing the summary

The Summary page provides key information about the number custodians, data sources with and without filtering criteria, and the estimated targets the system is going to generate.

Confirm the numbers match your configuration, then click **Generate Targets**.

Generating targets

The system will generate individual targets for each data source per custodian.

On successful completion of the process a table with list of entities and data sources will be presented with "1" each successfully generated custodian-data source pair. Any targets that failed generation will highlight *0* in red. Common causes of failures can include:

- entity not available in that specific domain,
- connection to the client domain failed, or
- incorrect Entity information.
- entity account still under migration from the legacy system to new system.

After correcting any errors, regenerate the targets and confirm the number of Targets generated correctly.

Click **View Collection Details**.

Viewing Collection details

Verify all the Collection Details, including the Custodians and Data Sources attached to the current Collection Job.

Click **Start Collection** to initiate the collection job.

Step 5: Monitoring and Reporting

You can monitor existing collection jobs and report on completed jobs.

Monitoring

To monitor the Collection progress, navigate to **Collect > Monitor** tab. The Monitor tab displays all the Queued, In Progress, and Completed jobs over the last 24 hours.

Reporting

To access the Collection report, open the completed collection Job.

- **Collection reports**—individual data source Collection reports can be downloaded by clicking the link in the **Result Link** field under the Data Sources section for each target.
- **Error reports**—individual data source **Error reports** can be downloaded by clicking the link in the **Error Link** field for each target that encountered an error during Collection.
- **Cumulative report**—a cumulative report for all the targets in the Collection job can be downloaded by clicking the **Collection Details** link in the Reports section on the right console.
- **Collection Summary**—summary of the Collection job can be downloaded in PDF format by clicking the **Collection Summary** link in the Reports section on the right console.

If you encounter any issues in following the above steps, please reach out to us at Relativity Support.

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