Microsoft Entra ID technical setup

This guide will take you through the technical requirements to send legal hold notices, preserve in place, and connect to your Entra ID to sync employee information. To do this, you need to create one application to link these functions. Use this guide when setting up the required syncs that Relativity needs to integrate with their system.

Organizations that prefer to pull employee information from another source can import .

Microsoft settings for Legal Hold

You have two options when it comes to setting up email in Legal Hold.

1. Use the Microsoft Graph API and an application registration in Azure.
2. Use your simple mail transfer protocol (SMTP) server and requires that you open certain ports.

Note: We recommend using the Microsoft Graph API and an application registration in Azure for ease of setup.

You can enter your email settings on the Legal Hold Settings tab in the Legal Hold workspace.

Relativity application registration requirements

The Graph API option for sending legal holds and the Active Directory Sync application rely on creating an application registration in Microsoft Azure. Only a Microsoft Application Administrator with access can create an application, find credentials, and delete an application. If you do not have permissions, contact your admin. Please refer to Microsoft documentation if needed.

The process consists of the following steps:

1. Registering an Azure application for AD.
2. Adding email settings.
3. Adding Active Directory Sync settings.

Registering an Azure application and credentials

Complete the steps in this section to create an application registration that you need for email and for syncing to Active Directory. To create your application ID and secret, you must have Application Administrator privileges to log into your Azure Portal and register an app.

Store your application ID and Secret in a safe place as you will need it in Relativity.

Start registering your app by following the steps below:

Start with registering your application in the Azure portal by following the steps below.

Caution: The listed permissions and roles are required and supported by Relativity.

- Relativity does not support substitutions or reduced permissions.
- You can submit requests for alternative or reduced permissions as product feedback.

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

Note: These steps must be completed by a Microsoft 365 administrator.

1. Open your Azure Portal.
2. Click **Microsoft Entra ID** (formerly known as Azure Active Directory).

3. Click **App registrations**.
4. Click **New Registration** to display the Register an application page.
5. Enter an application name in the **Name** field.
6. Accept the default setting, **Accounts in this organizational directory only**, as the supported account type.
7. Click **Register**.
8. Once the application is registered, make note of the **Application (client) ID** and **Directory (tenant) ID** for use later when configuring the data source in Relativity aiR Collect.

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

1. Click **API Permissions**.
2. Click **Add a permission**.
3. Click **Microsoft Graph**.
4. Select **Delegated Permissions**.
5. Select the following options from the Delegated Permissions section:
    - **Mail – Mail.Send**
    - **Mail - Mail.ReadWrite**
    - **User – User.Read**
6. Click **Add Permission**.
7. Click **Grant Permission**.
8. Select **Application Permissions**.
9. Add the following permissions:
    - **Directory - Read.All**
    - **Group - Read.All**
    - **User - Read.All**
10. Click **Add permissions**.
11. Click **Grant Permissions**.

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

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

Setup information – email

Use this table below and the documentation for and as a guide for finding and entering information during the email settings set up.

Field	Required information	Enter required information
Application Client ID	Enter the Application Client ID created during registering the Legal Hold application in Microsoft 365.	

Field	Required information	Enter required information
Application Client Secret	Enter the Application Client Secret value, not secret ID, created during registering the Legal Hold application in Microsoft 365.	
Domain address of Microsoft Azure instance	Enter the Domain name of the Microsoft 365 tenant the collection is for Ex. [tenant ID].onmicrosoft.com.	
From Email Address	Leave blank, as Relativity will use the email Inbox that you authenticated with.	
Reply to Email Address	Leave blank, as Relativity will use the email Inbox that you authenticated with.	

Setup Information – Entra ID employee information

Use the table below and the as a guide for finding and entering information in during Active Directory sync set up. Confirm that you installed the Integration Points and applications in your Relativity workspace before trying to sync with Entra ID.

Integration Points setup fields	Enter required information
Application ID from Microsoft Azure	
Application Secret value from Microsoft Azure	
Domain address of Microsoft Azure instance	
Any filtering requirements used to filter imported data. Please discuss this with your Implementation Specialist.	Optional
Determine the fields to sync with Relativity. Required Fields • First Name • Last Name • Email Address • Employee ID Suggested Fields • Department • Location • Phone Number • Custom fields	

SMTP server information

If your organization cannot use the Graph API, you can configure Legal Hold with your company's SMTP server.

Enter, or make note, of the following settings requirements to set up the integration with your company's SMTP server.

Information label	Description of required information	Enter required information
User Name for SMTP	The username for the account on the SMTP server used for sending emails. This can be an email address, domain name, or username depending on the server settings. Even if you configure your SMTP server for anonymous authentication, you must input a value. For example, "anonymous."	

Information label	Description of required information	Enter required information
Password for SMTP	The password for the account on the SMTP server that Legal Hold uses for sending emails. Even if you configure your SMTP server for anonymous authentication, you must input a value. For example, "anonymous."	
Domain	The SMTP domain address. For example, “smtp.office365.com”	
SMTP Port	The SMTP port number. **Note:** Legal hold outgoing emails are designed to work with SMTP protocol on port 587. If you want to use any other SMTP ports like 25, 465, 2525, you must request Relativity to open that port in the Relativity aiR instance.	
SSL (Y or N)	The Secure Sockets Layer. Select Yes to use Secure Sockets Layer security for SMTP. You should consult with your IT department if you are unsure whether your SMTP server uses SSL.	
From Email Address	The display name or email address you want to appear when sending communications from Legal Hold. When an employee receives a project communication, it will appear as if it was sent from the display name or address. For example, use the following verbiage "Display name <email@domain.com>."	
Reply to Email Address	The reply to email address. When an employee clicks reply to a project communication, their reply is sent to this address. See the From Email Address example above.	
Email Pro-cessor Type	Email services can use one of several options to interact with third-party applications. Consult with your IT department if you are unsure which email processor type to use alongside your mail server.	

Microsoft Settings for preservation hold

Microsoft 365 admin account

To connect Legal Hold to your Microsoft 365 tenant, create a dedicated, non-personal Microsoft 365 service account. The settings for the account are:

- Multi-factor authentication is supported with modern authentication.
- Complete the steps to add preseervation hold settings using modern authentication and set up SharePoint Discovery for preservation holds to generate Application, Certificate, Tenant, and Principal values below.

Collecting required preservation information

If you intend to use preserve in place and Microsoft 365, you must create an account that has admin permissions. Below are the required credentials before you begin setting up preserve in place.

Field	Field description	Required information
Enable Modern Authentication	Select Yes.	
Organization	Enter the fully qualified domain name of your Microsoft tenant, organization, including the ".onmicrosoft.com" portion. For example, relativitytest.onmicrosoft.com.	

Field	Field description	Required information
Application ID	Enter the Application ID that you created.	
Tenant ID	Tenant ID Enter the Tenant ID that you created.	
Certificate	Attach the self-signed certificate that you created.	
Certificate Password	Enter the password that protects the private key of the certificate that you created.	
Domain Name	Enter the Microsoft 365 Tenant name. The domain name is located between @ and .onmicrosoft.com. For example, the domain in ediscovery@relativity.onmicrosoft.com is relativity.	
Principal Client ID	Enter the Principal Client ID you created in SharePoint Discovery. **Note:** Only required if configuring Sharepoint preservation.	
Principal Client Secret	Enter the Principal Client Secret you created in SharePoint Discovery. **Note:** Only required if configuring Sharepoint preservation.	

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