



Relativity Integration Points Guide

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1 Integration Points

Integration Points offers a solution to configure integrations from third party systems to Relativity objects and from Relativity instance-to-instance with Integration Points Sync. For more information, see [Promoting data between workspaces through Integration Points on page 96](#).

Interested developers can create a separate ADS application to pull data from a third party system source provider. Integration Points ingests that application to handle the scheduling, setup, field mapping, and actual import into Relativity. By using the Integration Points platform, developers can reduce the amount of time needed to create these custom integrations while end users receive a consistent and easy setup approach.

In addition to supporting developer-built custom integrations, Integration Points also provides a built-in integration to Lightweight Directory Access Protocol (LDAP) enabled HR servers such as Microsoft Active Directory. Built on the Integration Points platform, the LDAP integration can filter and schedule imports from Active Directory data into a Relativity workspace. For example, the workstations, employee names, data shares, etc.

Since the Integration Points doesn't offer Full Name field calculation for Custodian/Entity object, the field is not available as an option for mapping. If you need to update the Entity object, please use the LDAP provider, which allows new records to be added with a field other than Full Name as the identifier. Alternatively, you may consider using Relativity Desktop Client for Custodians/Entities updates.\

Note: You can locate an application's version number by navigating to Applications & Scripts > Application Library tab. You must be a system admin to access this tab.

1.1 Using Integration Points scenarios

Using Integration Points as a developer

You're the lead developer of an organization responsible for building Relativity customizations. One of your clients started tracking all of their litigation-related information outside of Relativity in a new product called Whazootie. They mention to you that they would love to have this same information available in their Relativity workspaces to tie their document review to specific case information.

You use Whazootie's APIs to build a simple Relativity application to connect to a Whazootie website without building any import or setup steps. You give the application to your client along with Integration Points for them to install in a workspace. They can use all the security, scheduling, setup, and import options available in Integration Points along with the Whazootie connection to set up multiple imports that bring Whazootie data into their Relativity workspace.

Using Integration Points as an end user

You're the litigation support professional responsible for setting up workflows and templates to help manage your company's legal hold procedure using Relativity Legal Hold. You want to ensure that all custodian information is kept up-to-date so that holds always go to the correct email address and that the litigation team is aware of custodians who have changed departments or left the company. Unfortunately, all of the custodian information is scattered across multiple company HR servers containing unnecessary computer and network data.

To solve this problem, you use the Integration Points setup wizard to configure new integrations to each HR server, mapping items to specific Relativity fields. You work with your team to configure a filter in each setup so that only the appropriate employees are brought in as Custodians and schedule the import to occur automatically each night during off-hours. As a result, your custodian address book is always up-to-date, ensuring that proper litigation workflows are followed with every custodian.

2 Installing Integration Points

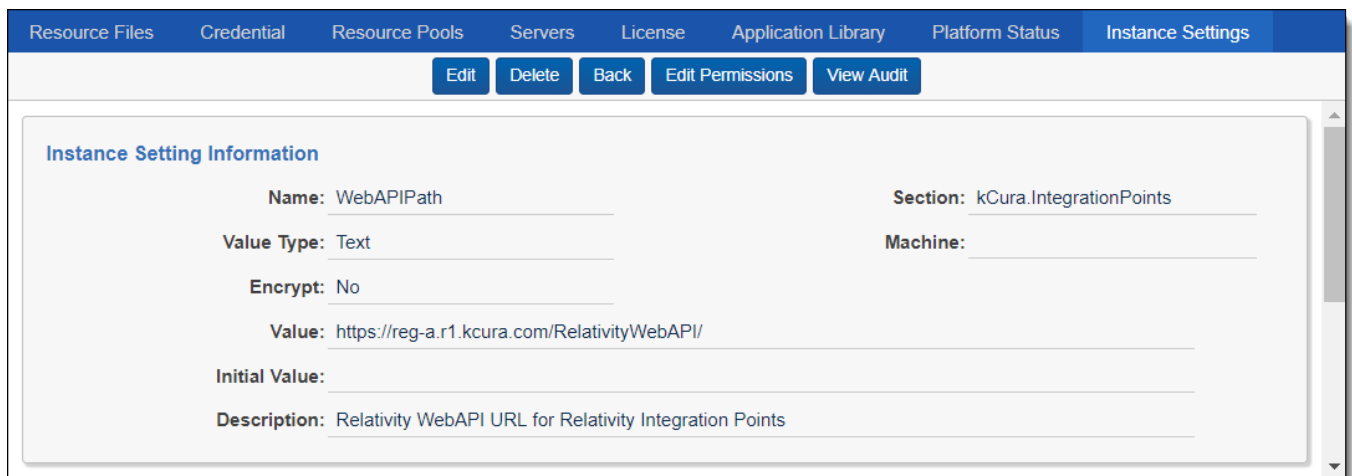
To successfully use Integration Points, you need to install the Integration Points application to at least one workspace.

2.1 System requirements and specifications

You must have the following in order to use Integration Points:

Note: Processing is not required to use Integration Points.

- Integration Points 11.3 is only compatible with Relativity 11.3 and above. As such, Integration Points has the same system requirements as its compatible Relativity version. For more information, see the System Requirements guide.
- The WebAPIPath instance setting in the kCura.IntegrationPoints section configured correctly. Note that this path is case sensitive.



The screenshot displays the 'Instance Settings' page for the 'WebAPIPath' instance. The page has a blue header with navigation tabs: 'Resource Files', 'Credential', 'Resource Pools', 'Servers', 'License', 'Application Library', 'Platform Status', and 'Instance Settings'. Below the header are buttons for 'Edit', 'Delete', 'Back', 'Edit Permissions', and 'View Audit'. The main content area is titled 'Instance Setting Information' and contains the following fields:

Name:	WebAPIPath	Section:	kCura.IntegrationPoints
Value Type:	Text	Machine:	
Encrypt:	No		
Value:	https://reg-a.r1.kcura.com/RelativityWebAPI/		
Initial Value:			
Description:	Relativity WebAPI URL for Relativity Integration Points		

2.2 Installing Integration Points

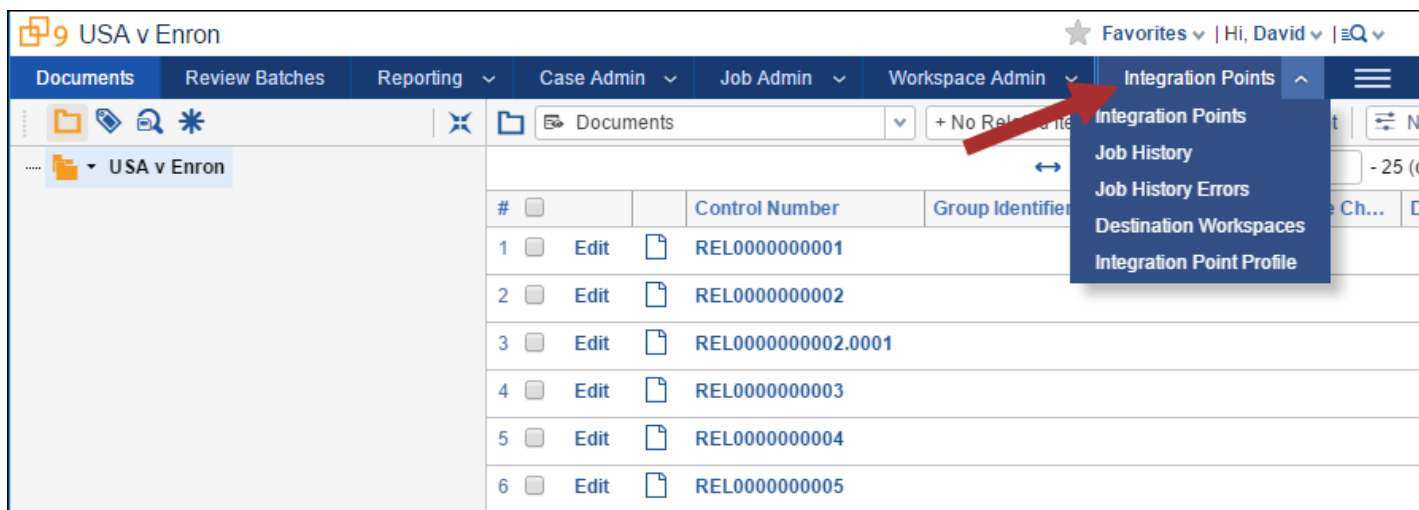
Since Integration Points uses the ADS framework, you have the following options available for installing Integration Points in your environment. See Relativity Applications in the Admin guide.

- **Install Integration Points from the Application Library** - If you add the Integration Points application to the Application Library, you can install it to the current workspace, or to multiple workspaces at once, from the Application Library.
- **Install Integration Points from an external file** - You can import the Integration Points application into your workspace from an external file if it has not been added to the Application Library.

Once you install Integration Points application, the necessary Integration Points agents will be deployed automatically.

2.3 Accessing Integration Points

Once you have installed Integration Points, the Integration Points application tab appears in your workspace.



2.4 Security permissions

The following tables provide detailed breakdowns of the security permissions required to use Integration Points.

To submit a job for a non-Relativity source provider (FTP, LDAP, or Load File) and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Destination	Destination RDO	View, Edit, Add
Destination	Allow Import	Admin operation

To submit a job with Relativity as the source provider and display console errors for that job, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Workspace	View, Edit, Add
Source	Integration point	View
Source	Job History	View, Edit, Add
Source	Destination Provider	View
Source	Source Provider	View
Source	Integration Point Type	View
Source	Document	View, Edit
Source	Search	View, Edit, Add
Source	Advanced & Saved Searches	Browser

Workspace	Object/operation/tab	Permission type
	<ul style="list-style-type: none"> The saved search that you use for the integration point must have an owner of Public. 	
Destination	Destination Workspace	View, Edit, Add
Destination	Allow Export	Admin operation

If you are creating an integration point for a non-Relativity source provider (FTP, LDAP, or Load File), Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit <ul style="list-style-type: none"> Edit is required for adding Job History RDO's.
Source	Job History	View, Edit, Add
Source	Job History Error	View, Edit, Add <ul style="list-style-type: none"> Edit is required to mark errors as new and expired

If you are creating an integration point with Relativity as the source provider, Relativity assumes you have the following system admin permissions:

Workspace	Object/operation/tab	Permission type
Source	Destination workspace	View, Edit, Add <ul style="list-style-type: none"> Edit is required to rename destination workspaces.
Destination	Manage Object Types <ul style="list-style-type: none"> This is required to create new object types. 	Admin operation
Destination	Source workspace	Add, Edit <ul style="list-style-type: none"> Edit is required for situations when Relativity renames the destination workspace upon a source workspace name change.
Destination	Source job	Add

To view an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Job History	View
Source	Integration point	View
Source	Integration point type	View

To create and edit an integration point with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point	View, Edit, Add <ul style="list-style-type: none"> Edit is only required if you're editing the integration point. Add is only required if you're creating the integration point.
Source	Integration point type	View
Destination	Allow Import	Admin operation

To create an integration point with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

To create an integration point with any source provider from an integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View

To view any integration point profile, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration point profile	View
Source	Source provider	View
Source	Destination provider	View
Source	Integration point type	View

To create and edit an integration points profile with any source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Integration Point Profile	View, Edit, Add <ul style="list-style-type: none"> Edit is only required if you're editing the integration point profile. Add is only required is you're creating the integration point profile.
Source	Integration Point Type	View
Source	Source Provider	View
Source	Destination Provider	View
Destination	Allow Import	Admin operation

To create and edit an integration points profile with a Relativity source provider, you need the following permissions:

Workspace	Object/operation/tab	Permission type
Source	Allow Import	Admin operation

If you do not have sufficient permissions and you attempt to perform either of the following actions, you will see an error message stating "You do not have sufficient permissions. Please contact your system administrator." In each case, Relativity creates an error listing all missing permissions.

- Loading the integration points console or clicking Run Now or Retry:
 - If the error occurs after a button click, the message is prefixed with, "Failed to submit integration job."
 - If the job is a retry job, the prefix reads, "Failed to submit the retry job."
- Saving an integration point after creating a new one or editing an existing one.

Note: Integration points is tenant-aware. This means that workspace admins within a tenancy receive an error if they attempt to push to a workspace they do not have permissions to. This error occurs when they click Run Now on the integration point that they create to push documents to review.

2.5 Troubleshooting

If you encounter issues with Integration Points while seeing either of the errors listed below, you must install the certificates that you are using for HTTPS on your web server to the trusted root certificate store on all Relativity Servers in your environment. If this doesn't work, restart the kCura Service Host Manager and kCura Agent Manager windows services.

- On import - *No WebApi nor Kepler service found to perform the request. at Relativity.DataExchange.Service.WebApiVsKeplerSwitch.WebApiVsKepler.UseKepler() at kCura.WinEDDS.Service.Kepler.WebApiVsKeplerFactory.UseKepler(Uri webApiUrl, NetworkCredential credentials, Func`1 getCorrelationId) at System.Lazy`1.CreateValue()...*
- On export - *Relativity.Sync.SyncException: Sync job failed. See inner exceptions for more details. ---> System.AggregateException: One or more errors occurred. ---> kCura.WinEDDS.Exceptions.InvalidLoginException: Login failed. ---> System.Exception: Unknown failure during authentication --->...*

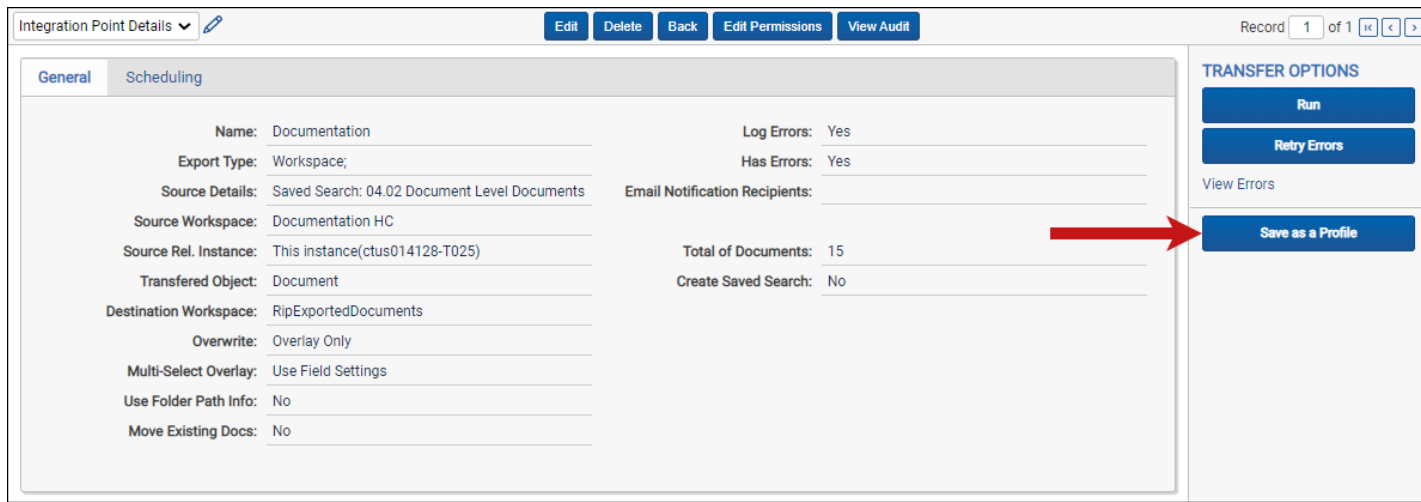
3 Integration Points profiles

You have the option of creating and saving profiles, which you can use to run future import or export jobs through Integration Points.

You can make your profiles specific to each data source provider so that you can then reuse those settings and avoid having to remap fields multiple times.

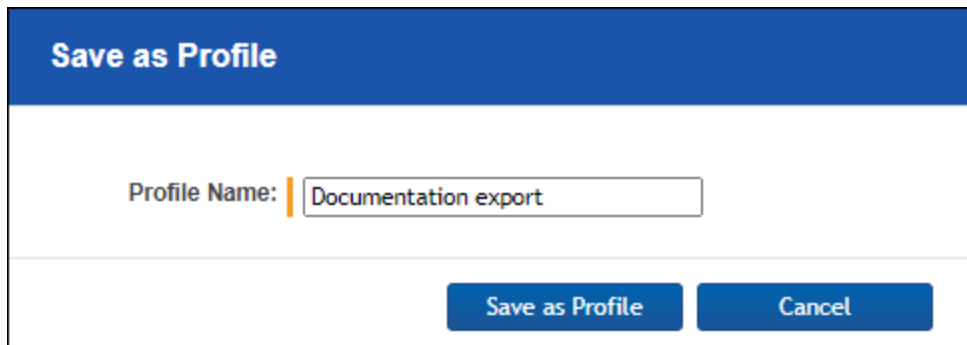
You can save a profile through the Transfer Options console on an integration point that you're currently creating or editing, or you can create one through the Integration Point Profile tab.

To save a just-created integration point as a profile, click the **Save as a Profile** button on the Transfer Options console.



The screenshot shows the 'Integration Point Details' console. The 'General' tab is selected, and the 'Scheduling' sub-tab is active. The console displays various configuration fields for an integration point named 'Documentation'. On the right side, the 'TRANSFER OPTIONS' panel is visible, containing buttons for 'Run', 'Retry Errors', and 'Save as a Profile'. A red arrow points to the 'Save as a Profile' button. The 'Save as a Profile' button is highlighted in blue.

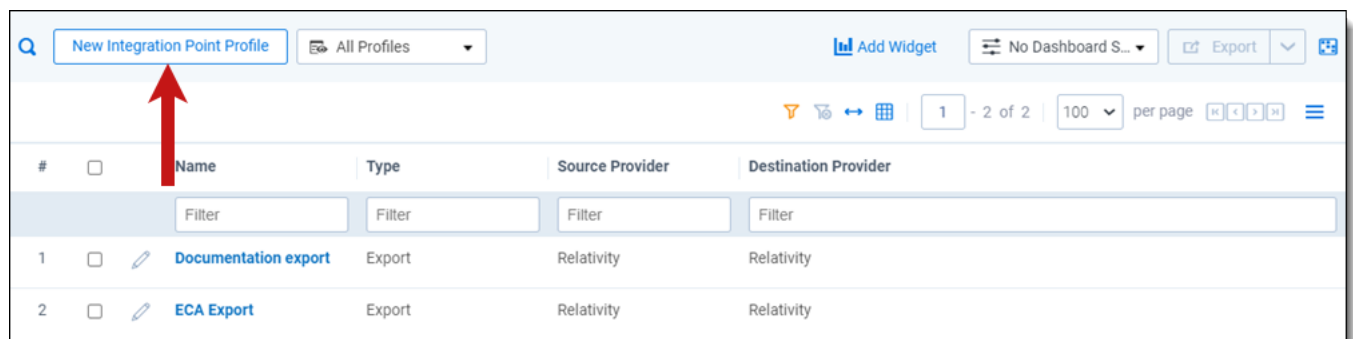
Enter a name in the **Profile Name** field and click **Save as Profile**. Note that the profile name defaults to the name you originally gave the integration point you created.



The screenshot shows the 'Save as Profile' dialog box. It has a blue header with the text 'Save as Profile'. Below the header, there is a 'Profile Name' label followed by a text input field containing the value 'Documentation export'. At the bottom of the dialog, there are two buttons: 'Save as Profile' and 'Cancel'.

To create a profile through the Integration Point Profile tab:

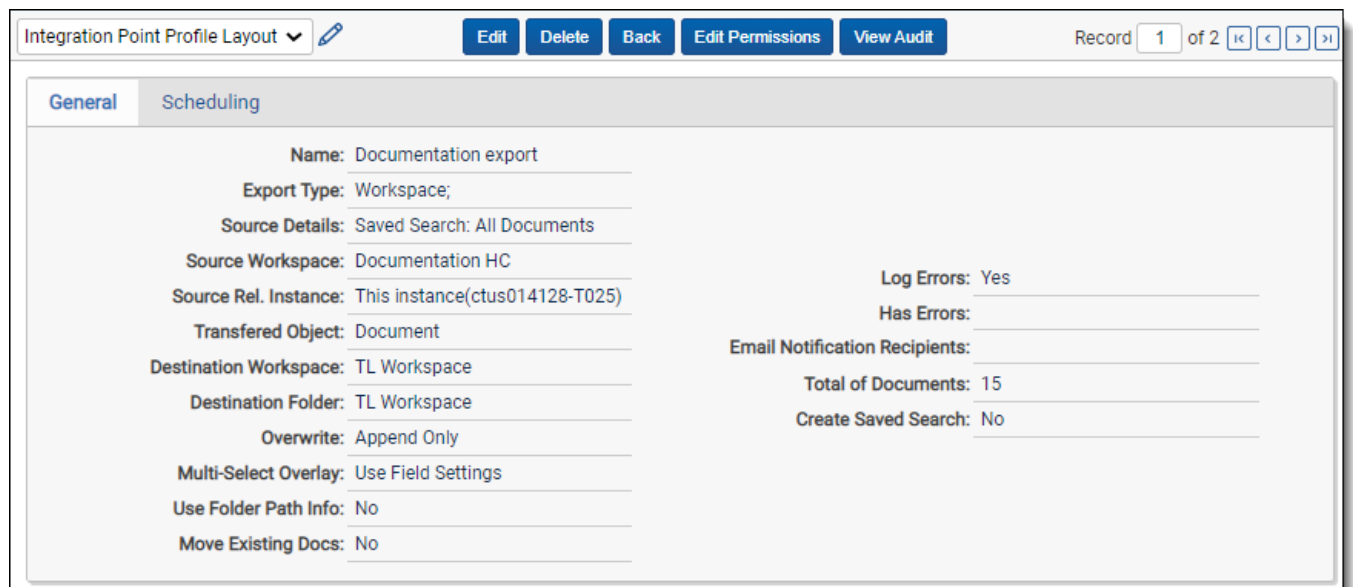
1. Select the **Integration Point Profile** tab.
2. Click **New Integration Point Profile**.



The screenshot shows the top navigation bar of the application. A red arrow points to the 'New Integration Point Profile' button, which is located next to a search icon and a dropdown menu labeled 'All Profiles'. Other buttons in the top bar include 'Add Widget', 'No Dashboard S...', 'Export', and a settings icon. Below the navigation bar is a table with columns: '#', 'Name', 'Type', 'Source Provider', and 'Destination Provider'. The table contains two rows: 'Documentation export' and 'ECA Export', both of type 'Export' and using 'Relativity' as the source and destination providers. The table has filters for each column and pagination controls at the bottom right showing '1 - 2 of 2' and '100 per page'.

#	Name	Type	Source Provider	Destination Provider
1	Documentation export	Export	Relativity	Relativity
2	ECA Export	Export	Relativity	Relativity

- Complete the required fields as you would for any integration point you're creating. For more information, see [Importing data through Integration Points on page 14](#) or [Exporting data through Integration Points on page 40](#). The fields and layouts for creating a profile are identical to those for creating any integration point that intend to run, except that after you save the profile, you don't have the option to run it. Instead, you see a detailed layout of the profile you just created.



The screenshot shows the 'Integration Point Profile Layout' form. The 'General' tab is selected, and the 'Scheduling' sub-tab is active. The form contains various fields for configuring the profile, including Name, Export Type, Source Details, Source Workspace, Source Rel. Instance, Transferred Object, Destination Workspace, Destination Folder, Overwrite, Multi-Select Overlay, Use Folder Path Info, Move Existing Docs, Log Errors, Has Errors, Email Notification Recipients, Total of Documents, and Create Saved Search. The fields are organized into a grid-like layout with labels and input areas.

Integration Point Profile Layout	
Name: Documentation export	Log Errors: Yes
Export Type: Workspace;	Has Errors:
Source Details: Saved Search: All Documents	Email Notification Recipients:
Source Workspace: Documentation HC	Total of Documents: 15
Source Rel. Instance: This instance(ctus014128-T025)	Create Saved Search: No
Transferred Object: Document	
Destination Workspace: TL Workspace	
Destination Folder: TL Workspace	
Overwrite: Append Only	
Multi-Select Overlay: Use Field Settings	
Use Folder Path Info: No	
Move Existing Docs: No	

Once you save the profile, it is visible in the Integration Point Profiles tab, and you have the option of applying it to a new integration point through the Profile field on the Setup layout.

Create Integration Point

Setup

Complete the Setup

1

2

General

Name:

New export

Type:

☐ Import

☒ Export

Source:

Relativity

Destination:

Relativity

Transferred Object:

Document

Profile:

Select...

If the Destination workspace is changed after the fields have been mapped, the fields will automatically be remapped.

The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. They are mapped so they the integration points job won't fail. This means that if the source workspace fields can't match to the new destination workspace fields, those unmatched are presented at the end of the mappings list for easy identification. Relativity also informs the user that the original source fields from the profile were mapped with corresponding fields from the destination workspace.

Once they are, a pop-up modal displays "We restored the fields mapping as destination workspace has changed."

3.1 Copying Integration Point profiles

You can copy the configuration of a Relativity Integration Point profile from a template workspace to a new workspace. The integration type needs to be set as an Export with the destination set to Relativity. This profile configuration is considered a non-document object. For a list of non-document objects that can be copied, see the Admin Guide.

Note: The configuration of the Integration Point Profiles with Type: Import or Export and Destination: Loadfile will not be carried over.

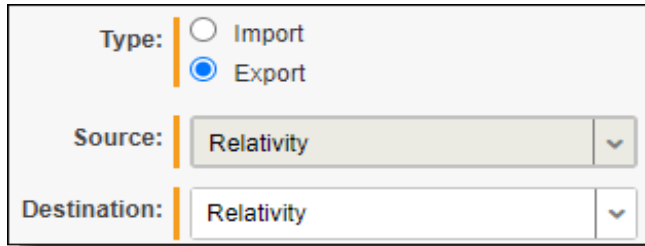
When copied over, the profile's fields are mapped and are editable.

3.1.1 Configuring an Integration Point Profile for copying

To create an Integration Point profile that can be copied to another Relativity workspace, follow the configurations below.

3.1.2 Setup

- **Name** - enter a name of your choice.
- **Type** - select Export. Needs to be Export for profile to be copied.
- **Source** - select Relativity. Needs to be Relativity for profile to be copied.
- **Destination** - select Relativity. Needs to be Relativity for profile to be copied.
- **Transferred Object - Document** is automatically populated here and can't be modified.
- **Profile** - select a profile of your choice.
- **Include in ECA Promote List** - select yes or no.



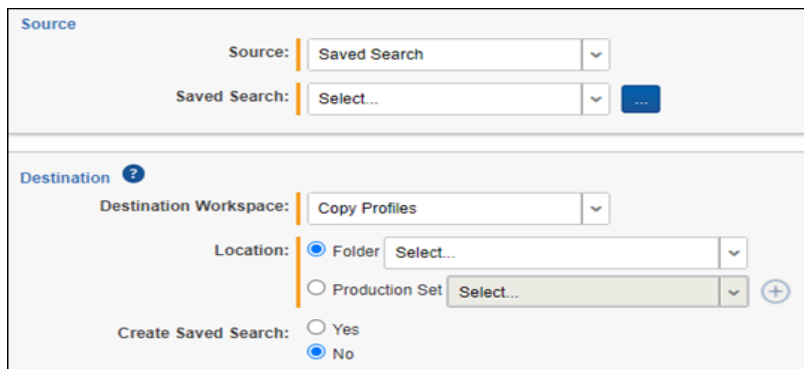
The screenshot shows a form with three sections. The first section is labeled 'Type:' and has two radio buttons: 'Import' (unselected) and 'Export' (selected). The second section is labeled 'Source:' and has a dropdown menu with 'Relativity' selected. The third section is labeled 'Destination:' and has a dropdown menu with 'Relativity' selected.

3.1.3 Connect to Source

Notes: When updating the connection to source for the copied profile, the Source field defaults to Saved Search. The Saved Search field is empty and you need to select the saved search of your choice whether it's the same saved search as the original profile or a different saved search.

The Location field defaults to Folder and the drop-down menu is empty for you to choose their destination folder.

- **Source** - defaults to saved search.
- **Saved Search** - select saved search of your choice.
- **Destination Workspace** - select Relativity
- **Location** - select a location of your choice.
- **Create Saved Search** - select yes or no.



The screenshot shows a form with two main sections. The first section is labeled 'Source' and has two dropdown menus: 'Source' (set to 'Saved Search') and 'Saved Search' (set to 'Select...'). There is a blue button to the right of the 'Saved Search' dropdown. The second section is labeled 'Destination' and has a dropdown menu for 'Destination Workspace' (set to 'Copy Profiles'). Below this is a 'Location' section with two radio buttons: 'Folder' (selected) and 'Production Set' (unselected). Each radio button has a dropdown menu next to it, both set to 'Select...'. There is a blue button with a plus sign to the right of the 'Production Set' dropdown. At the bottom is a 'Create Saved Search' section with two radio buttons: 'Yes' (unselected) and 'No' (selected).

During the creation of a new workspace, click the Template Workspace field. Select the workspace with the Integration Points profile. For more information on creating a workspace template, see the Admin Guide.

4 Importing data through Integration Points

Integration Points provides you with the ability to import a CSV file, LDAP, or load file directly into your workspace, and scheduling future or recurrent import jobs.

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](#).

4.1 Considerations

Consider the following before importing data through Integration Points:

- Changing root folder permissions during import is not a supported workflow.
- All Integration Points jobs are fully editable after run.
- Although importing and exporting a load file is possible in Integration Points, the Relativity Desktop Client is the main application recommended for a stable and efficient load file import and export. For more information, see the Desktop Client Guide.

4.2 Importing a CSV file

To create an integration point specifically for importing an FTP (CSV file), perform the following steps:

1. Navigate to the **Integration Points** tab in your workspace and click **New Integration Point**.
2. In the **Setup** layout, complete the following fields:
 - **Name**—the name of your integration for reference purposes.
 - **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
 - **Source**—select **FTP (CSV File)** to sync to a Custodian list on an FTP Server to automatically update custodian information in your workspace. We strongly recommend using a secured FTP server and not using anonymous authentication.
 - **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
 - **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. If you're importing the entity object, select **Entity** here.
 - **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
 - **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.

- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day _ the month**—select the day of the month that you want this integration point to sync.
 - **The _ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.

3. Click **Next** to advance to the Connect to Source layout.

4. In the **Connect to Source** layout complete the following fields:

- **Connection Information**
 - **Host**—the FTP (File Transfer Protocol) or SFTP (SSH File Transfer Protocol) server address. For example, *filetransfer.example.com*. If Relativity can't locate this address, you will receive an error stating that the remote couldn't be resolved, and you won't be able to proceed.
 - **Protocol**—select the FTP or SFTP protocol.
 - **Port**—the server port to which you want to connect. The FTP protocol default Port number is 21. The SFTP protocol default Port number is 22.

Notes: If you need to open any port, please contact [Relativity Support](#) and allow at least three days to respond. Opening a new port for your RelativityOne instance requires a Security assessment. To successfully import an FTP (CSV file), the standard network ports should be open on both RelativityOne and FTP server for outgoing connections from RelativityOne's Web and Agent servers and for listening (FTP server). Note that the firewall solutions may impact the connectivity between RelativityOne and the FTP server.

- **Username**—(Optional) the username to use for authentication. If left blank, Integration Points will use "anonymous."
- **Password**—(Optional) the associated password to use for authentication. If left blank, Integration Points will use "anonymous."

- **File Information**

- **CSV Filepath**—the location of the CSV file that Integration Points imports from the FTP/SFTP server. If you set the generated CSV file to always include the date, you can specify this file path value to use date wildcards so that Integration Points always imports the latest file. For example, the following file path will import the most recently dated file:
`/export/nightlyexport/*yyyy*-*MM*-*dd*_HRIS_export.csv`

- Wildcards are case sensitive.
- The wildcard feature only pulls data from a file name with the current date.
- You can also use hh:MM:ss for hours, minutes, and seconds, with capital M's for minutes. When using times, only file names within the last hour are found.

5. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

6. In the **Map Fields** wizard, Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields. You have the following options for mapping fields:

- Use the Shift + click and Ctrl + click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client.
- Use the text search boxes above the Source and Destination lists to find a particular field.
- Use the single and double arrows or double-click a field to move selected fields between columns.
- Use the horizontal scroll bar in each column as needed to fully view long field names.
- Each column displays the number of fields available in that column. This allows you to quickly compare the number of mapped fields to make sure they match. If they do not match, an error will display when you attempt to save the Integration Point.
- The field names in the Destination column include the type of each field listed.
- Click the **Map Fields** button between the Source and Destination columns to automatically map all fields with matching names, except single/multiple object fields. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

When mapping fields there are items to note:

- If the WebAPIPath instance setting in the kCura.IntegrationPoints section isn't configured correctly after upgrade or installation, the Source field list is empty because it can't return any attributes, and you aren't able to map fields.
- You don't need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or Unique Name. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.
- The Full Name field is not available as an option for mapping. If you need to update the entity object, please use the LDAP provider. The LDAP provider allows the addition of new records with a field other than Full Name as the identifier. Alternatively, you may consider using Relativity Desktop Client for entity updates.

7. Complete the following Import Settings on the Map Fields layout:

- **Overwrite**— determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:

- **Append Only**—promote only new records into the review workspace.
- **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You aren't able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system overlays records when you promote documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - Select **Yes** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting Yes makes the Folder Path Information field required below.
 - Select **No** if you don't want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace. For the purposes of ECA and Investigation, select the **Processing Folder Path** option.
- **Unique Identifier**—for every import, you must select a field that contains the unique identifier, a field with a primary key such as a Control Number or an ArtifactID, for the specific import. If you select an Overlay or Append/Overlay to run, Integration Points uses this field as the key to determine which records already exist in the Relativity workspace.
- **Use Folder Path Information**—select a source field in the drop down that contains a folder path structure that you want to be created in the workspace for your documents to be placed into.
- **Extracted Text**—select the destination field that is mapped to a path to Extracted Text files. The content of these files will be read into the selected field. Note that only Long Text destination fields that are mapped will show up as options in the Extracted Text dropdown. You can select an encoding type for the extracted text files as well.
- **Custodian Manager Contains Link**—this Yes/No field is only visible when you select the Entity RDO from the LDAP source provider, and lets you indicate if Legal Hold should expect a linked value in the

manager field from LDAP.

8. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Running the import job on page 35](#).

4.3 Importing LDAP

Before importing LDAP, the Integration Points LDAP Provider needs to be connected to the LDAP server. To connect successfully, open the standard network ports for both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). To connect these ports, contact [Relativity Support](#).

Note: To successfully connect Integration Points LDAP Provider to the LDAP server, the standard network ports should be open on both RelativityOne and the LDAP Server for outgoing connections from RelativityOne's Web and Agent servers and for listening (LDAP Server). LDAP connection requires using 636 (Secure Socket Layer) network ports. Custom ports are not supported and may not work correctly. Please be aware that firewall solutions may impact the connectivity between RelativityOne and LDAP server.

To create an integration point specifically for importing LDAP, perform the following steps:

1. Navigate to the **Integration Points** tab in your workspace and click **New Integration Point**.
2. In the **Setup** layout, complete the following fields:
 - **Name**—the name of your integration for reference purposes
 - **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
 - **Source**—select **LDAP** here, since you want to import data from a Lightweight Directory Access Protocol source. For example, use this source provider to import an organization's people directory.
 - **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type.
 - **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. It's typical to use the LDAP source to sync the Entity object.
 - **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
 - **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
 - **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
 - **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting **Yes** makes the following fields available:

- **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**— select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day _ the month**—select the day of the month that you want this integration point to sync.
 - **The _ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
- **Start Date**—the date that you want Integration Points to start syncing the data.
- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.

3. Click **Next** to advance to the Connect to Source layout.

4. In the **Connect to Source** layout complete the following fields:

- **Connection Path** - the server used to locate the directory. For example, "Relativity.corp." Note that you can optionally include specific organizational unit references by adding a forward slash (/) after the server. The following example looks up items in the Relativity.corp domain within the Employees organizational unit:
Relativity.corp/OU=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=corp
- **Object Filter String**—this string specifies certain attributes that the requested LDAP entries must contain that Integration Points considers for import. For example, if you want to import users, you'd use an object filter string such as (*objectClass=user*). For more information on search filter syntax, refer to this Microsoft article: [Search Filter Syntax](#).
- **Authentication**—Secure Socket Layer is the only applicable authentication types for port 636.
- **Username**—if required by the server's authentication, enter a username to connect to the server (connection path).
- **Password**—if required by the server's authentication, you can enter a password to connect to the server (connection path).
- **Import Nested Items**—select **Yes** for the import to include all sub directories in the specified connection path. Select **No** for the import to include only the first level items brought back in the connection path.
- **Connection Path**—the server used to locate the directory. For example, "Relativity.corp." Note that you can optionally include specific organizational unit references by adding a forward slash (/) after the server. The following example looks up items in the Relativity.corp domain within the Employees organizational unit:
Relativity.corp/OU=Employees,OU=Accounts,OU=Relativity,DC=Relativity,DC=corp
- **Object Filter String**—this string specifies certain attributes that the requested LDAP entries must contain that Integration Points considers for import. For example, if you want to import users, you would

use an object filter string such as (*objectClass=user*). For more information on search filter syntax, refer to this Microsoft article: [Search Filter Syntax](#).

- **Authentication**—Secure Socket Layer is the only applicable authentication type for port 636.
 - **Username**—if required by the server's authentication, enter a username to connect to the server (connection path).
 - **Password**—if required by the server's authentication, you can enter a password to connect to the server (connection path).
 - **Import Nested Items**—select **Yes** for the import to include all sub directories in the specified connection path. Select **No** for the import to include only the first level items brought back in the connection path.
5. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.
6. In the **Map Fields** wizard, Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields. You have the following options for mapping fields:
- Use the Shift + click and Ctrl + click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client.
 - Use the text search boxes above the Source and Destination lists to find a particular field.
 - Use the single and double arrows or double-click a field to move selected fields between columns.
 - Use the horizontal scroll bar in each column as needed to fully view long field names.
 - Each column displays the number of fields available in that column. This allows you to quickly compare the number of mapped fields to make sure they match. If they do not match, an error will display when you attempt to save the Integration Point.
 - The field names in the Destination column include the type of each field listed.
 - Click the **Map Fields** button between the Source and Destination columns to automatically map all fields with matching names, except single/multiple object fields. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

Note: If the WebAPIPath instance setting in the kCura.IntegrationPoints section isn't configured correctly after upgrade or installation, the Source field list is empty because it can't return any attributes, and you aren't able to map fields.

Note: You don't need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.

7. Complete the following Import Settings on the Map Fields layout:
- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to

import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.

- **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You aren't able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—for every import, you must select a field that contains the unique identifier, a field with a primary key such as a Control Number or an ArtifactID, for the specific import. If you select an Overlay or Append/Overlay to run, Integration Points uses this field as the key to determine which records already exist in the Relativity workspace.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - Select **Yes** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting Yes makes the Folder Path Information field required below.
 - Select **No** if you don't want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
- **Extracted Text**—select the destination field that is mapped to a path to Extracted Text files. The content of these files will be read into the selected field. Note that only Long Text destination fields that are mapped will show up as options in the Extracted Text dropdown. You can select an encoding type for the extracted text files as well.
- **Custodian Manager Contains Link**—this Yes/No field is only visible when you select the Entity RDO from the LDAP source provider, and lets you indicate if Legal Hold should expect a linked value in the manager field from LDAP.

8. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Running the import job on page 35](#).

4.4 Importing a document load file

Note: Before creating an integration point to import a load file, note that you must first place the load data in the `.\\EDDS<WorkspaceArtifactID>\\DataTransfer\\Import` folder, or you won't be able to select that data for the Import Source field.

To create an integration point specifically for importing a document load file, perform the following steps:

1. Navigate to the **Integration Points** tab in your workspace and click **New Integration Point**.
2. In the **Setup** layout, complete the following fields:
 - **Name**—the name of your integration for reference purposes
 - **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
 - **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
 - **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
 - **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
 - **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
 - **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
 - **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
 - **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.

- **Send On -**

- **Day _ the month**—select the day of the month that you want this integration point to sync.
- **The _ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."

- **Start Date**—the date that you want Integration Points to start syncing the data.
- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.

3. Click **Next** to advance to the Connect to Source layout.

4. In the **Connect to Source** layout complete the following fields.

Load File Settings

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Document Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you're importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
 - These locations are hard-coded into Relativity and can't be changed. You can't load or export data to a different location than is listed here.
 - For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: *Network\Server\Fileshare\EDDS\{WorkspaceArtifactID}\DataTransfer\Import*. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

File Encoding—the following fields are only available if you selected Document Load File for the Import Type field above.

- **File Encoding**—select an encoding for the document load file. (Consult your processing vendor or department to determine the correct encoding option, if necessary.) If your file contains a language other than English, choose a Unicode option. Note the following details about encoding:
 - Relativity immediately applies any changes that you make to the encoding of a load file, and displays these changes in the column header preview.
 - Relativity provides you with the ability to audit the encoding of a load file.
- **Column**—select the character used to separate columns.
- **Quote**—select the character used as the text qualifier.

- **Newline**—select the character used to indicate the end of a line in any extracted text or long text field.
- **Multi-Value**—select the character used to separate choices within a field.
- **Nested Value**—select the character used to separate the different levels of a multi-choice hierarchy. For example, you might import a field with following values: “Hot\Really Hot\Super Hot; Look at Later”. Using a semi-colon (;) as a multi-value delimiter, and a backslash (\) as a nested value delimiter, Relativity displays the choices
- **File Column Headers**—displays the load file's column headers. Relativity automatically updates this section of the Load File tab when you select the file encoding. Note the following details about file column headers:
 - After you select an encoding, this section displays the fields in the load file. The column headers in the file display as vertical list. The fields display in alphanumeric order. The numeric value in parentheses indicates the position of the field within the file. Click **Next** to advance to the Map Fields layout, which contains a list of Relativity fields from their destination RDO as well as attributes that the source provider pulled back.

5. In the **Map Fields** wizard, Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields. You have the following options for mapping fields:

- Use the Shift + click and Ctrl + click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client.
- Use the text search boxes above the Source and Destination lists to find a particular field.
- Use the single and double arrows or double-click a field to move selected fields between columns.
- Use the horizontal scroll bar in each column as needed to fully view long field names.
- Each column displays the number of fields available in that column. This allows you to quickly compare the number of mapped fields to make sure they match. If they do not match, an error will display when you attempt to save the Integration Point.
- The field names in the Destination column include the type of each field listed.
- Click the **Map Fields** button between the Source and Destination columns to automatically map all fields with matching names, except single/multiple object fields.

Note: If the WebAPIPath instance setting in the kCura.IntegrationPoints section isn't configured correctly after upgrade or installation, the Source field list is empty because it can't return any attributes, and you aren't able to map fields.

Note: You don't need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or Unique Name. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.

6. Complete the following Import Settings on the Map Fields layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:

- **Append Only**—promote only new records into the review workspace.
- **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
- **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You aren't able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Native Files**—this Yes/No field is only visible when you select the Documents RDO, and lets you indicate whether Integration Points should import any native files in the sync.
 - **Native File Path**—this field appears if you select Yes to import the native files. From the drop-down menu, select the source provider attribute containing the file path links to the natives that you want to import.
- **Unique Identifier**—for every import, you must select a field that contains the unique identifier, a field with a primary key such as a Control Number or an ArtifactID, for the specific import. If you select an Overlay or Append/Overlay to run, Integration Points uses this field as the key to determine which records already exist in the Relativity workspace.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - Select **Yes** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting Yes makes the Folder Path Information field required below.
 - Select **No** if you don't want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
 - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
 - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field below.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace. For the purposes of ECA and Investigation, select the **Processing**

Folder Path option.

- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
 - Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the destination workspace's root folder; now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, you'd select Yes.
 - Select **No** if you don't want to re-folder existing documents.
- **Extracted Text**—select the destination field that is mapped to a path to Extracted Text files. The content of these files will be read into the selected field. Note that only Long Text destination fields that are mapped will show up as options in the Extracted Text dropdown. You can select an encoding type for the extracted text files as well.
- **Cell contains file location**—select this option if your extracted text is in document-level text files, and your load file contains a path to those text files.
- **Encoding for undetectable files**—select an encoding for the text file.

7. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Running the import job on page 35](#).

4.5 Importing an image load file

Note: Before creating an integration point to import a load file, note that you must first place the load data in the `.\\EDDS<WorkspaceArtifactID>\\DataTransfer\\Import` folder, or you won't be able to select that data for the Import Source field.

To create an integration point specifically for importing an image load file, perform the following steps:

1. Navigate to the **Integration Points** tab in your workspace and click **New Integration Point**.
2. In the **Setup** layout, complete the following fields:
 - **Name**—the name of your integration for reference purposes
 - **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
 - **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether you're importing a document, image, or production load file.
 - **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
 - **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
 - **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in

the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On -**
 - **Day _ the month**—select the day of the month that you want this integration point to sync.
 - **The _ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.

3. Click **Next** to advance to the Connect to Source laMicrosoft Entra IDyout.

4. In the **Source Information** layout complete the following fields.

Load File Settings

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Image Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you're importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
 - These locations are hard-coded into Relativity and can't be changed. You can't load or export data to a different location than is listed here.

- For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: *Network\Server\Fileshare\EDDS {WorkspaceArtifactID}\DataTransfer\Import*. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

Import Settings—the following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the images you're importing.
 - **Use load file page IDs**—select this to use the default setting to number the images, which is the control number.
 - **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

Note: Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.

- **Import Mode**
 - **Append Only**—select this to load only new records.
 - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below This field acts as a link indicating to Relativity where to import the data.
 - **Append/Overlay**—select this to add new records and overlay data on existing records.

Note: Select append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

- **Overlay Identifier**—select a field that stores overlaid document-level Bates information on the document. This is only available if you selected Overlay Only for the import mode.

Note: The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.

Notes: The No option isn't available for selection in RelativityOne because all files must be copied to a selected File Repository.

- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.

Note: The No option is not available for selection in RelativityOne because all files must be copied to a selected File Repository.

- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Load Extracted Text**—determines whether or not Relativity will load new text for Production documents that may be revised based on redactions.
 - The text files must have .txt extensions, be stored in the same directory as the TIFF files, and be named in the same as the TIFF files.
 - This field is only available for image load files.
 - When you select this, the required Encoding for undetectable files field appears below.
- **Encoding for undetectable files**—select an encoding for the new text file that Relativity loads, per your enabling of the Load Extracted Text field above.

5. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Running the import job on page 35](#).

4.6 Importing from Microsoft Entra ID

Note: As of October 2023, Microsoft renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to [Microsoft documentation](#) for more information.

See information on importing from Microsoft Entra ID

The Integration Points Microsoft Entra ID Provider is a separate and standalone application that is not in the Relativity Application Library. For assistance in getting the Microsoft Entra ID Provider installed into your workspace, contact [Relativity Support](#). For more information, see [Microsoft Entra ID provider on page 93](#).

You will need the following to complete the setup in Integration Points:

- Application ID from Microsoft Azure
- Application Secret from Microsoft Azure
- Domain address of Microsoft Azure instance
- Any filtering requirements that will be used to filter imported data
- Field Mappings to map fields between Relativity and Microsoft Entra ID

When creating an integration point, follow the steps below:

1. Navigate to the Integration Points tab.
2. Click **New Integration Point**.
3. Complete the following fields in the Set Integration Details layout:
 - **Name**—the name of your integration for reference purposes.

Notes: Name the application in Integration Points the same as you did in Microsoft Entra ID for easy location of application when needing to make updates.

- **Type**—select Import to designate the job as a data import. Selecting Import makes all the possible import sources available for selection in the Source field below.
- **Source**—all possible third-party systems that you can import data from. Select Microsoft Entra ID.
- **Destination**—by default, this is set to Relativity and isn't editable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
- **Transferred Object**—the Relativity Dynamic Object (RDO) to which you want to import the data. Select the Entity object.
- **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list.
- **Email notifications**—the email address(es) to which Integration Points sends a notification detailing whether the sync succeeded or failed. Use semicolons between addresses.
- **Log errors**—select Yes or No to denote whether Integration Points tracks item level errors.
 - If you select Yes, each job also logs any item level errors. For example, a fixed length text field not being large enough to contain an imported value.
 - If you select No, Integration Points doesn't log item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting Yes makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs once every day.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the Reoccur field, in which you'll provide a number value in Every # week(s) choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of months in which this integration point recurrently syncs.
 - **Send on**
 - Day _ the month—select the day of the month that you want this integration point to sync.

- The **_ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, The Second Friday of the month."
 - **Start Date**—the date you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date you want Integration Points to stop syncing the data. Leaving the End Date blank causes the integration point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not the server.
4. Click **Next** to continue to the Connect to Source layout.
 5. Complete the following fields in the Connect to Source layout:
 - **Application ID**—The ID of the application was created in the Azure Portal. For more information, see the [Finding Azure credentials on page 94](#).
 - **Password**—The associated password for the application that was created in the Azure Portal.
 - **Domain**—The Microsoft Entra ID tenant domain the Azure application resides in.
 - **Filter By** —You can limit the records imported by limiting import to specific users or groups.
 - **Filter**—The filter condition used to identify Users or Groups that should be imported. Filters must be written using the Graph query syntax (e.g. department eq 'Engineering')
 - **MS-Graph Version**—Determines which version of the Graph API Integration Points will use when interfacing with Microsoft Entra ID. Defaults to version 1.0 of the Graph API if left blank. Another available option is Beta.
 6. Click **Next** to continue to the Map Fields layout.

Notes: A warning message appears at top of page if not validated. Can't move to next step until error is resolved.

7. Map the fields from the Destination (workspace) to the Source (load file) so that Integration Points imports the targeted data into specific Relativity fields. Microsoft Entra ID software integration contains the following default Source mapped fields. The Destination fields are dependent on what fields currently exist in your workspace.

Notes: If Relativity can't locate fields in your workspace for the default mapping, Relativity moves these fields to the bottom of the Source list. You can either map these fields to other workspace fields, or remove them from the list.

8. (Optional) Add or remove any fields from the field mapping based on your preferences. Click Map Fields to map default selections.

Notes: Rename Relativity fields to match Microsoft to increase the number of auto-mapped fields. You still may have to manually update fields after auto-mapping.

9. Complete the following fields in the Settings card:
 - **Overwrite**—includes options to Append Only, Overlay Only, or Append/Overlay. By default, the application selects Append Only.
 - **Multi-Select Field Overlay Behavior**—only available if Overlay Only or Append/Overlay are selected in the Overwrite field. This field determines how the system will overlay records when you push documents to the review workspace. This field provides the following choices:

- **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
- **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Unique Identifier**—includes the options from the mapped fields. Use the default UniqueID option. In Microsoft Entra ID, map the UniqueID to the ID field to guarantee future custodian updates.
- **Entity Manager Contains Link**—this Yes/No field is only visible when you select the Entity RDO from the LDAP source provider, and lets you indicate if Legal Hold should expect a linked value in the manager field from LDAP.

10. Click **Save**.

Once all of the settings have been entered the Integration Points job will run according to the schedule that was set. If you would like to run the job ahead of that time. Please follow the instructions at this link.

4.6.1 Reporting

Reporting on Microsoft Entra ID imports can be done in Integration Points. For more information, see [Monitoring job history and errors on page 86](#).

4.7 Importing a production load file

Note: Before creating an integration point to import a load file, note that you must first place the load data in the `.\\EDDS<WorkspaceArtifactID>\\DataTransfer\\Import` folder, or you won't be able to select that data for the Import Source field.

To create an integration point specifically for importing a production load file, perform the following steps:

1. Navigate to the **Integration Points** tab in your workspace and click **New Integration Point**.
2. In the **Setup** layout, complete the following fields:
 - **Name**—the name of your integration for reference purposes
 - **Type**—select **Import** to designate the job as a data import. Selecting Import makes all of the possible import sources available for selection in the Source field below.
 - **Source**—select **Load File** here, since you want to import a load file into a workspace. On the Connect to Source layout, you'll have the option of specifying whether your importing a document, image, or production load file.
 - **Destination**—by default, this is set to **Relativity** and is uneditable when you select Import as the type, since you've already designated that you want to import into a Relativity workspace. You'll select the specific workspace on a subsequent layout.
 - **Transferred Object**—select the specific Relativity Dynamic Object to which you want to import the data. Since you're importing the document object, select **Document** here.
 - **Profile**—complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in

the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).

- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler**—gives you the option of scheduling additional imports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On -**
 - **Day _ the month**—select the day of the month that you want this integration point to sync.
 - **The _ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date**—the date that you want Integration Points to start syncing the data.
 - **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server.

3. Click **Next** to advance to the Connect to Source layout.

4. In the **Source Information** layout complete the following fields.

Load File Settings

- **Import Type**—select the type of load file you'd like to import to the workspace. Select **Production Load File** from the drop-down list.
- **Workspace Destination Folder**—select the specific folder within the destination workspace in which you want to place the documents you're importing. The folder tree you see when you click this drop-down menu is identical to the folder structure in the destination workspace.
- **Import Source**—click the down arrow and select a load file from the workspace's DataTransfer import location in the fileshare.
 - These locations are hard-coded into Relativity and can't be changed. You can't load or export data to a different location than is listed here.

- For reference purposes, the folder(s) displayed in the Import Source field actually reside in the following generic path: *Network\Server\Fileshare\EDDS {WorkspaceArtifactID}\DataTransfer\Import*. Accordingly, when an admin adds data to the Import folder inside the DataTransfer folder inside the folder displaying the workspace's artifact ID, that data then becomes available for selection in the Import Source field.
- **Start Line**—select the line number in the load file where you want the import process to begin. The default value is 1, which results in loading the entire file.

Import Settings—the following fields are only available if you selected Image or Production Load File for the Import Type field above.

- **Numbering**—determines the numbering scheme of the production you're importing.
 - **Use load file page IDs**—select this to use the default setting to number the production, which is the control number.
 - **Auto-number pages**—select this option if page IDs in the production or image load file are not unique. For example, you might import a set of TIFFs that share a page identifier for each record. The page identifiers are shared per document and are not unique. The Auto-number pages option appends the 01, .02, and so on to the page-level identifier, creating a unique number per page.

Note: Auto-numbering pages is useful if you are importing productions or image load files that use document-level numbering without page numbers, and include documents that contain multiple pages.

- **Import Mode**
 - **Append Only**—select this to load only new records.
 - **Overlay Only**—select this to update existing records only. When you select this, the required Overlay Identifier field appears below. This field acts as a link indicating to Relativity where to import the data.
 - **Append/Overlay**—select this to add new records and overlay data on existing records.

Note: Select append to import the extracted text and natives from a .dat file. Select overlay when overlaying production images onto the existing documents.

- **Overlay Identifier**—select a field that stores overlaid document-level Bates information on the document. This is only available if you selected Overlay Only for the import mode.

Note: The fields in the drop-down menu are fixed-length fields with a manually-applied SQL index. Note that this is NOT the same as adding the field to the full-text index. Contact your SQL database administrator to apply an index to a field.

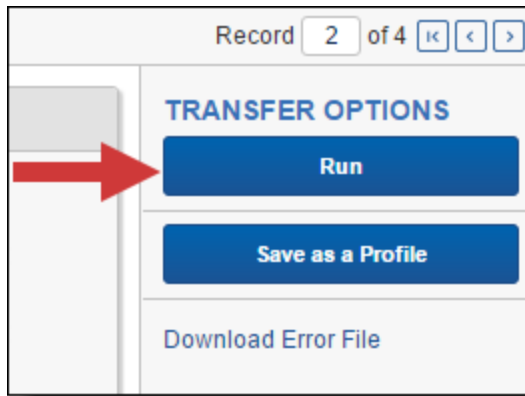
- **Copy Files to Document Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.
- **File Repository**—select the file repository to which you want to copy the files in the image load file. This field is only visible if you selected Yes for the Copy Files to Document Repository field above. Click **Default** to switch this value to the default file repository used by the workspace.
- **Production**—select a Relativity production that you want to upload images to. Only new production sets without a production source appear in this list.

5. Click **Save** to save the Integration Point.

Once you save the Integration Point, you can run the import job. For more information, see [Running the import job below](#).

4.8 Running the import job

Once you've created an Integration Point, you can manually run an integration point by selecting the Integration Point, and clicking **Run** from the console. This lets you run an integration point instantly, as opposed to scheduling an integration point to run.



Click **OK** on the run confirmation message.

The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing. For more information, see [Importing data through Integration Points on page 14](#).

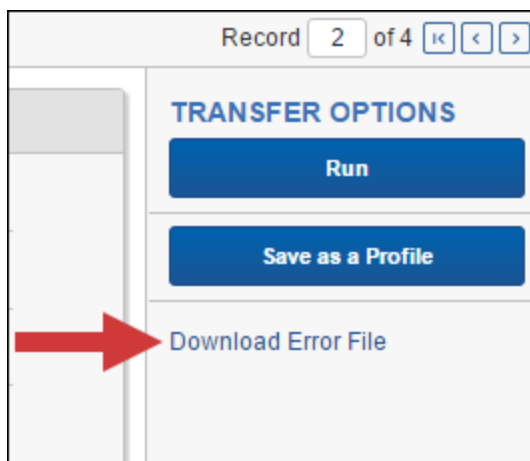
If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You'll see any of the following status values:

- **Pending** - the job has yet to be picked up by an agent.
- **Processing** - the agent has picked up the job and is in the process of completing it.
- **Completed** - the job is complete, and no errors occurred.
- **Completed with errors** - the job is complete and errors have occurred.
- **Error - job failed** - a job-level error occurred and the job didn't complete because it failed.
- **Stopping** - you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped** - the job has been stopped.

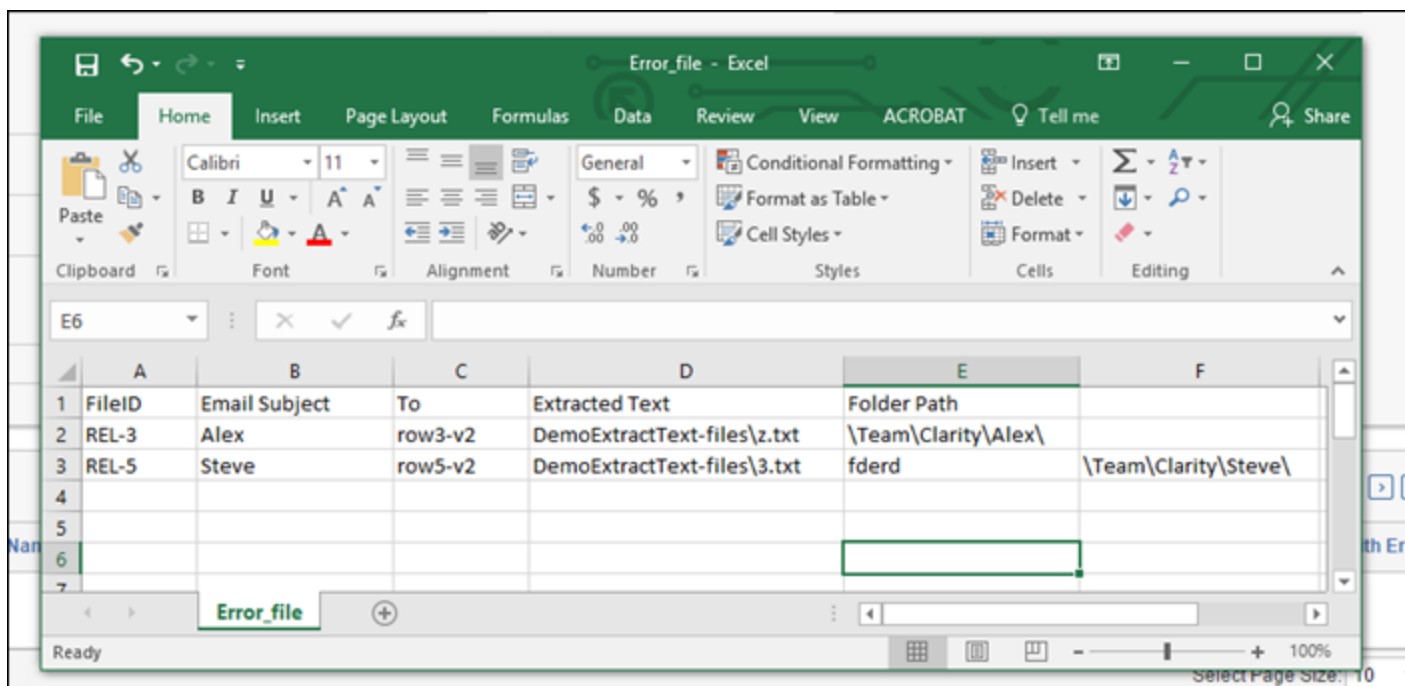
4.8.1 Downloading the error file

If your integration point encounters any errors during its run, the Download Error File link on the Transfer Options console is activated. This gives you the option of downloading an Excel file containing all the errors found in the integration point. Note that this option is available for load file imports only and isn't visible for other providers.

To download this file, click the **Download Error File** link in the Transfer Options console.



Then open the downloaded file in the bottom left corner of your screen.



You now have the option of manually fixing the errors, saving the modified file in your DataTransfer\Import folder, and creating a new integration point to import those fixed files, seeing that they didn't make it in with the original import. When doing this, simply ensure that the Import Source field of the new integration point refers to the file you just added.

4.8.2 Integration point agent considerations

When you have one agent enabled, a scheduled integration points job is always queued and is always run. When you have more than one agent, however, the scheduled job may get queued or it may result in an error, after which that job is rescheduled. In other words, there is mixed behavior when you have enabled more than one agent.

The following table provides a breakdown of this behavior:

If	Then
1. You enable a single agent called Agent 1.	1. Agent 1 picks up the Run or Retry Errors job for IP1 and completes it in one hour.

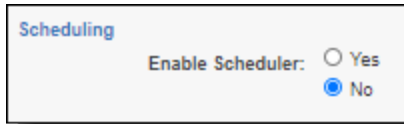
If	Then
<ol style="list-style-type: none"> 2. You schedule a job called IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 	<ol style="list-style-type: none"> 2. Agent 1 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 2 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 4. All other agents are busy, including Agent 2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 1 completes the Run or Retry Errors job for IP1. 3. Agent 1 picks up the scheduled job for IP1 and completes it.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You click Run or Retry Errors on IP1. 3. You click Run or Retry Errors on IP2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 2 picks up the Run or Retry Errors job for IP2 and begins working on it.

4.9 Disabling an Integration Point sync

To disable an integration point sync, simply turn off the scheduler.

1. From the Integration Points landing page, click the Integration Point Name that you wish to disable.
2. Click **Edit**.
3. From the Import Scheduling section under Enable Scheduler, select **No**. This disables the scheduling mech-

anism for that integration point.



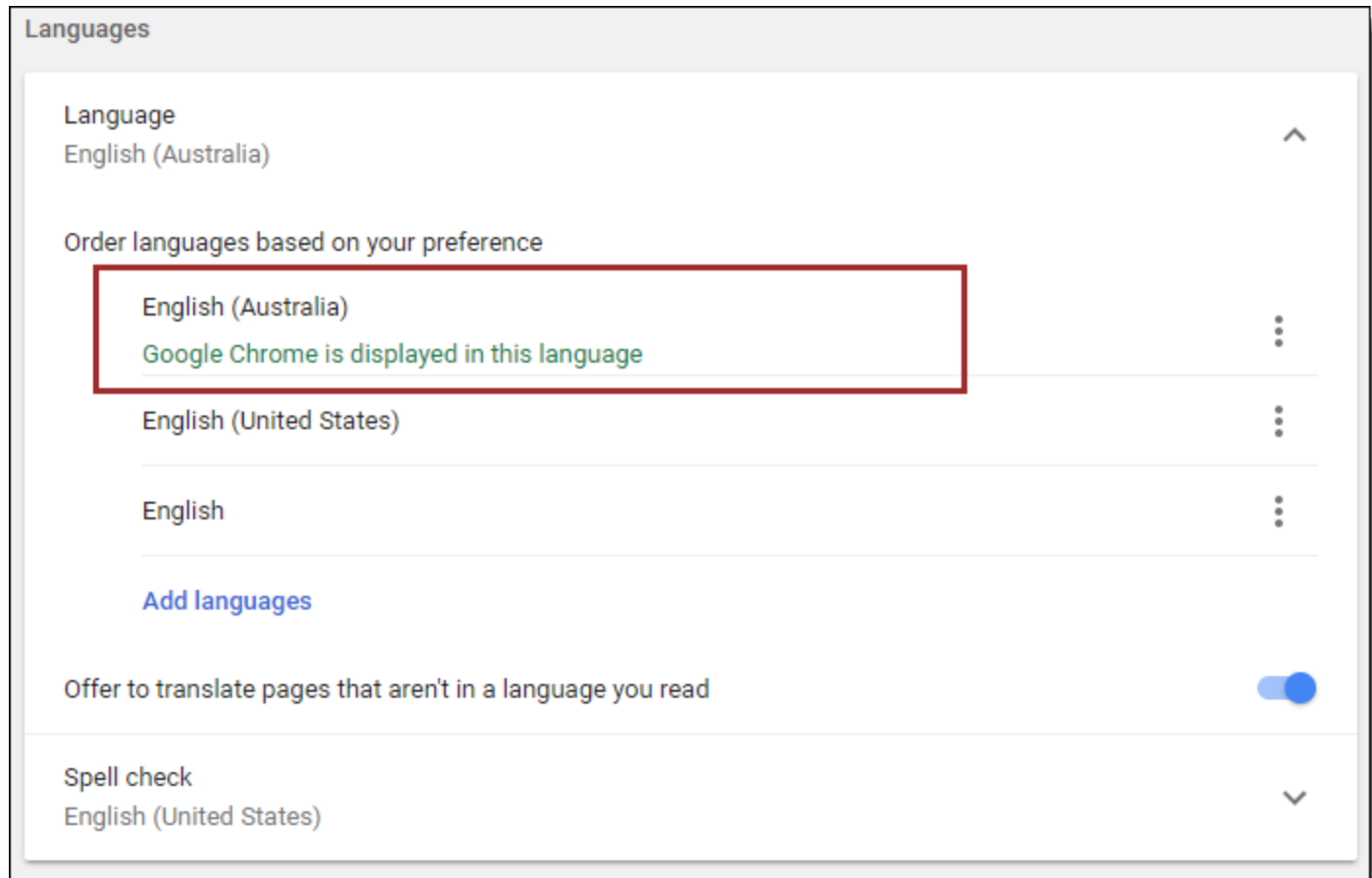
Scheduling

Enable Scheduler: ☐ Yes ☒ No

4.9.1 Scheduler date format considerations

The integration points scheduler accepts non-U.S. date formats to further accommodate, for example, users in Australia.

In this case, the default language in your browser settings is set to English (Australian) or any other language that would display a non-U.S. date format of day/month/year instead of /month/day/year.



Languages

Language
English (Australia)

Order languages based on your preference

English (Australia)
Google Chrome is displayed in this language

English (United States)

English

Add languages

Offer to translate pages that aren't in a language you read

Spell check
English (United States)

Relativity then properly displays the date when you select it for the Start and End Date fields in the Scheduling category.

Scheduling

Enable Scheduler: ☒ Yes
☐ No

Frequency: ▼

Start Date:

End Date:

Scheduled Time: ▼

Time Zone: ▼

This date format will also appear anywhere else in Relativity where a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

5 Exporting data through Integration Points

Integration Points provides you with the ability to export data directly from your workspace through the same functionality that the Relativity Desktop Client (RDC) provides for exporting the document object. This includes exporting saved searches, case folders, and productions directly from your workspace, and scheduling future or recurrent export jobs.

Note: When you export data to a load file through Integration Points, your files get saved to a file share. To access this file share, look at the AppID in the URL of your Relativity environment and locate the EDDS folder on the file share that has the same number.

5.1 Exporting a folder to load file

To create an integration point specifically for exporting a folder, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

Create Integration Point [Cancel] [i]

Setup 1 ————— 2 Complete the Setup [← Back] [Next →]

General

Name:

Type: ☐ Import ☒ Export

Source: ▼

Destination: ▼

Transferred Object: ▼

Profile: ▼

Include in ECA Promote List: ☐ Yes ☒ No

Advanced

Email Notification Recipients:
Separate by semi-colon

Log Errors: ☒ Yes ☐ No

Scheduling

Enable Scheduler: ☐ Yes ☒ No

- **Name** - the name of your integration for reference purposes.
- **Type** - select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source** - this is automatically set to **Relativity** since you're exporting data out of a Relativity workspace.
- **Destination** - select **Load File**. This is because you don't want to export directly to another Relativity workspace, but instead want to leverage the RDC export functionality, which is available on a subsequent layout only if you select Load File here.
- **Transferred Object** - select **Document**.
- **Profile** - use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
- **Email Notification Recipients** - enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors** - select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler** - gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**- the interval at which Relativity syncs this integration point.
 - **Daily** - select this option to sync once every day.
 - **Weekly** - select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly** - select the day of the month that you want this integration point to sync once every month.
 - **Reoccur** - enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day _ the month** - select the day of the month that you want this integration point to sync.
 - **The __ of the Month** - select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date** - the date that you want Integration Points to start syncing the data.
 - **End Date** - (Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time** - the time at which this integration point syncs. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

4. Complete the following fields on the **Source Information** layout:

Create Integration Point [Cancel] ⓘ

Setup Source Information Destination Information

1 2 3

← Back Next →

Source Detail

Source: Folder

Folder: SempergerCara

Views: Documents

Start Export at Record: 1

Columns To Export

Source Fields:

- Alert
- Analytics Index
- Artifact ID
- Attachment Name
- Attorney Review Comments
- Batch
- Batch::Assigned To
- Batch::Batch Set
- Batch::Status
- Bates Beg
- Bates Beg Attach
- Bates End
- Bates End Attach
- Case Admin - Production Volume
- Case Admin Saved Searches
- Control Number Beg Attach
- Control Number End
- Control Number End Attach
- Conversation Family
- Conversation Index
- Data Load Date
- Data Load Volume
- Date Created
- Date Last Printed
- Date Received
- Date Sent
- Delivery Receipt

Selected Fields:

- Confidential Designation
- Control Number
- Custodian - Single Choice
- Date Last Modified
- Document Extension
- Email CC
- Email From
- Email Subject
- Email To
- Group Identifier
- Issue Designation
- Privilege Designation
- Responsive Designation
- Sort Date
- Title

Renamed Fields:

Rename

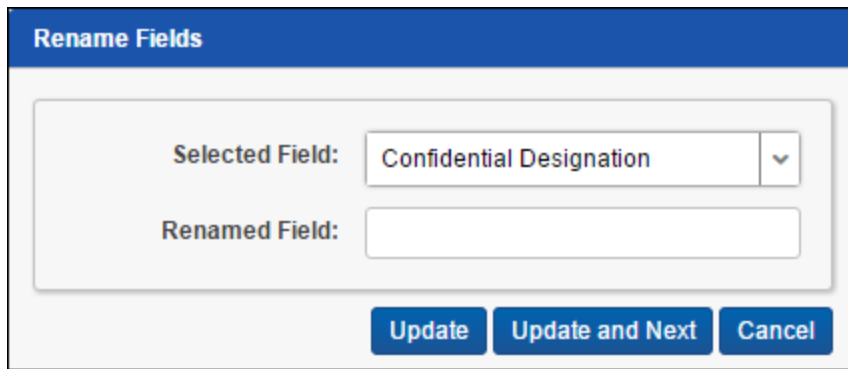
- **Source** - select **Folder** from the drop-down list. specify that you want to select a folder, from which you want export the data in your load file. You'll select this folder below from the folder structure in the Folder field. You'll also need to select a View from the Views field.
- **Folder** - click on the down arrow and expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you've selected Folder + Subfolders as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Views** - click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.
- **Start Export at Record** - select a record number that identifies the initial document for export. Integration Points, like the RDC, exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields** - choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your

load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename** - gives you the option of renaming the fields in your load file before exporting them. When you click this button, you're presented with the following settings in the Rename Fields window:



- **Selected Field** - displays the field that you've selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**- enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you don't change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** - click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** - click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** - click this to exit the Rename Fields window without applying further changes to current field names.

5. Click **Next** to advance to the Destination Information layout.

6. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel

i

Setup

Source Information

Destination Information

✓

✓

3

← Back

Save

Export Detail ?

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files:

☐

Destination Folder:

EDDS1064096\DataTransfer\Export\Documentation export directory_(Tim

▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

IMAGE

Image File Format:

Select...

▼

Data File Format:

Relativity (.dat)

▼

Data File Encoding:

Unicode

▼

File Path:

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path:

☒

Export Multiple Choice Fields As Nested:

☐

FILE NAMING OPTIONS

IMAGE

Name Output Files After:

Identifier

▼

Append Original File Name:

☐

File Type:

Single page TIFF/JPEG

▼

Image Precedence:

Original Images

▼

Subdirectory Prefix:

IMG

001

NATIVE

TEXT

Subdirectory Prefix:

NATIVE

001

Text File Encoding:

Unicode

▼

Text Precedence:

Select...

...

Subdirectory Prefix:

TEXT

001

Volume & Subdirectory Detail

VOLUME

SUBDIRECTORY

Prefix:

VOL

Start Number:

1

Number Of Digits:

2

Max Size (MB):

4400

Start Number:

1

Number Of Digits:

3

Max Files:

500

Load File Options

- **Export Type** - this field reflects the type of export job you're running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder** - specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder** - check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format** - select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format** - select a the format for the document-level load file you're exporting:
 - Relativity (.dat) - load file exports with the standard Concordance delimiters.
 - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
 - Comma-separated (.csv)
 - Custom (.txt) - load file exports with the custom delimiters that you select.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths** - paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths** - paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path** - check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you're exporting.
- **Export Multiple Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After** - select one of the following naming convention for exported files:
 - **Identifier** - select this option to name the files after the identifier for your workspace.
 - **Begin production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select select Produced Images as the Production Precedence below.
- **Append Original File Name** - select this option to append the original name of the file to the end of the exported file name.

Image - the following fields are only available if you selected Images for the Export Type field above.

- **File Type** - select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence** - select one of the following groups of produced documents for export instead of the original images:
 - **Original Images** - exports only the original, non-produced images.
 - **Produced Images** - exports a produced version of the images. When you select this, the following fields become available:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

Image Productions: November Production ...

Include Original Images If Not Produced: ☐

Subdirectory Prefix: IMG 001

- **Image Productions** - select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced** - exports only the original images in the event that they haven't been produced.
- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

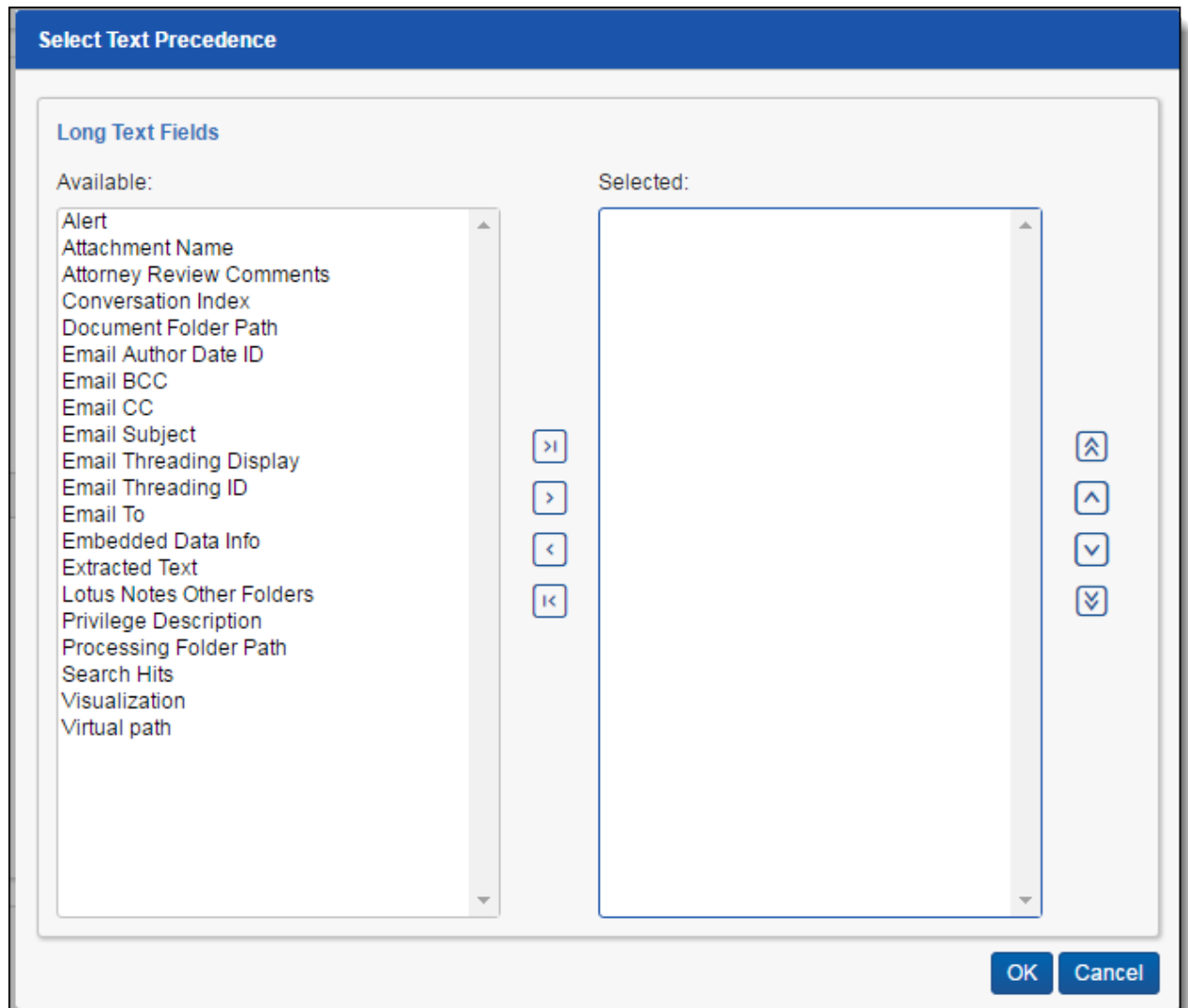
Native

- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text - the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding** - select the encoding for the document-level text files
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of

the fields.



- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix** - enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits** - select the number of digits attached to the prefix. For example, if you select 3, the output is VOL001, VOL002, and so on.
- **Max Size (MB)** - select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number** - select the starting number for the subdirectories.
- **Number of Digits** - select the number of digits of the subdirectory prefix For example, if you select 3, the output is IMG001, IMG002, and so on.
- **Max Files** - select the number of files to store in each subdirectory.

7. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you'll be able to run it and export the data based on the settings you specified. See [Running the export job on page 72](#) for details.

5.2 Exporting a folder and subfolders to a load file

To create an integration point specifically for exporting a folder and subfolders, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar with 'Create Integration Point', a 'Cancel' button, and an information icon. Below the title bar is a progress bar with two steps: 'Setup' (labeled with a large '1') and 'Complete the Setup' (labeled with a large '2'). To the right of the progress bar are 'Back' and 'Next' buttons. The 'Setup' section is expanded, showing three sub-sections: 'General', 'Advanced', and 'Scheduling'. The 'General' section contains fields for 'Name' (set to 'Doc Export'), 'Type' (radio buttons for 'Import' and 'Export', with 'Export' selected), 'Source' (dropdown menu set to 'Relativity'), 'Destination' (dropdown menu set to 'Load File'), 'Transferred Object' (dropdown menu set to 'Document'), 'Profile' (dropdown menu set to 'Select...'), and 'Include in ECA Promote List' (radio buttons for 'Yes' and 'No', with 'No' selected). The 'Advanced' section contains a text field for 'Email Notification Recipients: Separate by semi-colon' and a 'Log Errors' section with radio buttons for 'Yes' and 'No', with 'Yes' selected. The 'Scheduling' section contains an 'Enable Scheduler' section with radio buttons for 'Yes' and 'No', with 'No' selected.

- **Name** - the name of your integration for reference purposes.
- **Type** - select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source** - this is automatically set to **Relativity** since you're exporting data out of a Relativity workspace.

- **Destination** - select **Load File**. This is because you don't want to export directly to another Relativity workspace, but instead want to leverage the RDC export functionality, which is available on a subsequent layout only if you select Load File here.
- **Transferred Object** - select **Document**.
- **Profile** - use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
- **Email Notification Recipients** - enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors** - select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler** - gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**- the interval at which Relativity syncs this integration point.
 - **Daily** - select this option to sync once every day.
 - **Weekly** - select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly** - select the day of the month that you want this integration point to sync once every month.
 - **Reoccur** - enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day _ the month** - select the day of the month that you want this integration point to sync.
 - **The __ of the Month** - select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date** - the date that you want Integration Points to start syncing the data.
 - **End Date** - (Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time** - the time at which this integration point syncs. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

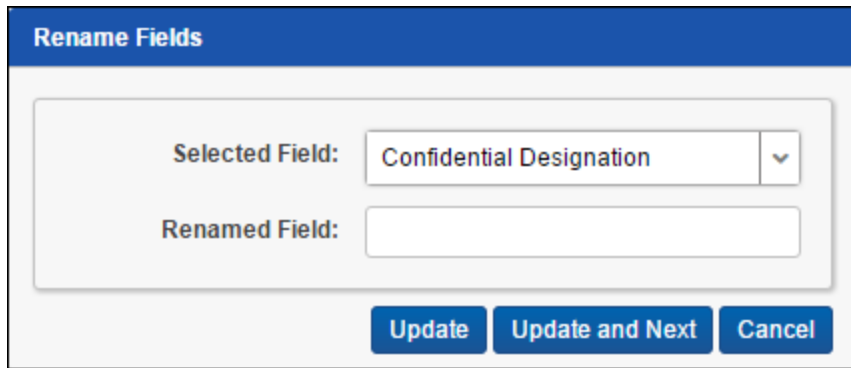
4. Complete the following fields on the **Source Information** layout:

- **Source** - select **Folder + Subfolders** from the drop-down list and specify that you want to select a folder and subfolders, from which you want to export the data in your load file. You'll select this folder below from the folder structure in the Folder + Subfolders field. You'll also need to select a View from the Views field.
- **Folder + Subfolders** - click on the down arrow and expand the folder structure, locate the folder and subfolders from which you want to export the data, and select it. This field is only available if you've selected Folder + Subfolders as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Views** - click on the down arrow and select a view for the data that you want to export. This is only available if you selected Folder or Folder + Subfolders as the source above.
- **Start Export at Record** - select a record number that identifies the initial document for export. Integration Points, like the RDC, exports the document with this record number and continues exporting documents with subsequent record numbers.

- **Source Fields | Selected Fields | Renamed Fields** - choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename** - gives you the option of renaming the fields in your load file before exporting them. When you click this button, you're presented with the following settings in the Rename Fields window:



- **Selected Field** - displays the field that you've selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**- enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you don't change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** - click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** - click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** - click this to exit the Rename Fields window without applying further changes to current field names.

5. Click **Next** to advance to the Destination Information layout.

6. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel

i

Setup

Source Information

Destination Information

✓

✓

3

← Back

Save

Export Detail ?

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files:

☐

Destination Folder:

EDDS1064096\DataTransfer\Export\Documentation export directory_(Tim

▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format:

Select...

▼

Data File Format:

Relativity (.dat)

▼

Data File Encoding:

Unicode

▼

File Path:

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path:

☒

Export Multiple Choice Fields As Nested:

☐

FILE NAMING OPTIONS

Name Output Files After:

Identifier

▼

Append Original File Name:

☐

IMAGE

File Type:

Single page TIFF/JPEG

▼

Image Precedence:

Original Images

▼

Subdirectory Prefix:

IMG

001

NATIVE

Subdirectory Prefix:

NATIVE

001

TEXT

Text File Encoding:

Unicode

▼

Text Precedence:

Select...

...

Subdirectory Prefix:

TEXT

001

Volume & Subdirectory Detail

VOLUME

Prefix:

VOL

Start Number:

1

Number Of Digits:

2

Max Size (MB):

4400

SUBDIRECTORY

Start Number:

1

Number Of Digits:

3

Max Files:

500

Load File Options

- **Export Type** - this field reflects the type of export job you're running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder** - specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder** - check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format** - select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format** - select a the format for the document-level load file you're exporting:
 - Relativity (.dat) - load file exports with the standard Concordance delimiters.
 - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
 - Comma-separated (.csv)
 - Custom (.txt) - load file exports with the custom delimiters that you select.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths** - paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths** - paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path** - check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you're exporting.
- **Export Multiple Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After** - select one of the following naming convention for exported files:
 - **Identifier** - select this option to name the files after the identifier for your workspace.
 - **Begin production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select select Produced Images as the Production Precedence below.
- **Append Original File Name** - select this option to append the original name of the file to the end of the exported file name.

Image - the following fields are only available if you selected Images for the Export Type field above.

- **File Type** - select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence** - select one of the following groups of produced documents for export instead of the original images:
 - **Original Images** - exports only the original, non-produced images.
 - **Produced Images** - exports a produced version of the images. When you select this, the following fields become available:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

Image Productions: November Production ...

Include Original Images If Not Produced: ☐

Subdirectory Prefix: IMG 001

- **Image Productions** - select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced** - exports only the original images in the event that they haven't been produced.
- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

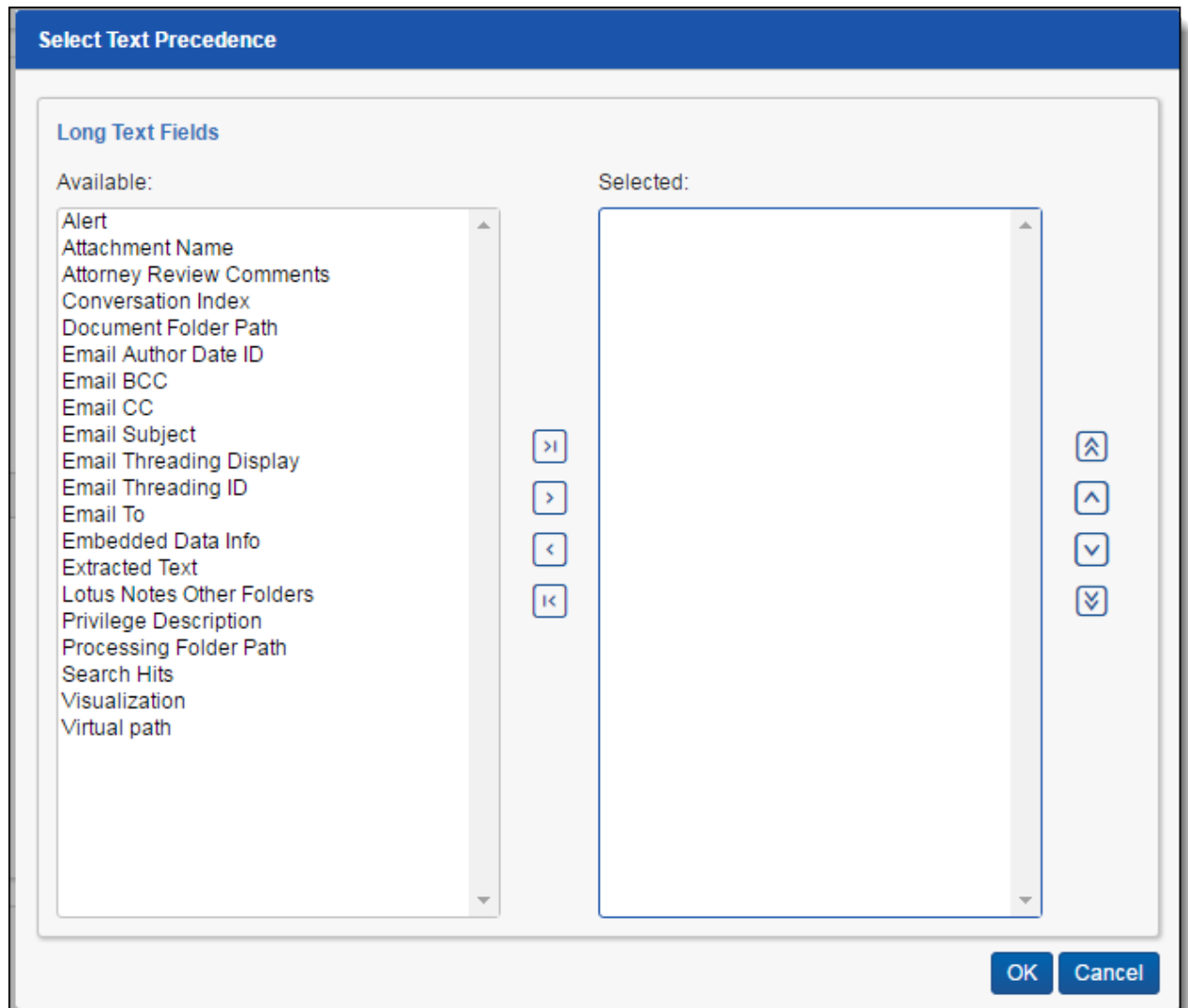
Native

- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text - the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding** - select the encoding for the document-level text files
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of

the fields.



- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix** - enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits** - select the number of digits attached to the prefix. For example, if you select 2, the output is VOL001, VOL002, and so on.
- **Max Size (MB)** - select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number** - select the starting number for the subdirectories.
- **Number of Digits** - select the number of digits of the subdirectory prefix For example, if you select 3, the output is IMG001, IMG002, and so on.
- **Max Files** - select the number of files to store in each subdirectory.

7. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you'll be able to run it and export the data based on the settings you specified. See [Running the export job on page 72](#) for details.

5.3 Exporting a production to a load file

To create an integration point specifically for exporting a production set, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

The screenshot shows the 'Create Integration Point' dialog box with a progress bar at the top indicating 'Setup' (Step 1) and 'Complete the Setup' (Step 2). The 'General' section is expanded, showing the following fields:

- Name: Doc Export
- Type: ☒ Import, ☒ Export
- Source: Relativity
- Destination: Load File
- Transferred Object: Document
- Profile: Select...
- Include in ECA Promote List: ☐ Yes, ☒ No

The 'Advanced' section shows the following fields:

- Email Notification Recipients: Separate by semi-colon
- Log Errors: ☒ Yes, ☐ No

The 'Scheduling' section shows the following field:

- Enable Scheduler: ☐ Yes, ☒ No

- **Name** - the name of your integration for reference purposes.
- **Type** - select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source** - this is automatically set to **Relativity** since you're exporting data out of a Relativity workspace.

- **Destination** - select **Load File**. This is because you do not want to export directly to another Relativity workspace, but instead want to leverage the RDC export functionality, which is available on a subsequent layout only if you select Load File here.
- **Transferred Object** - select **Document**.
- **Profile** - use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
- **Email Notification Recipients** - enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors** - select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler** - gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**- the interval at which Relativity syncs this integration point.
 - **Daily** - select this option to sync once every day.
 - **Weekly** - select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly** - select the day of the month that you want this integration point to sync once every month.
 - **Reoccur** - enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day _ the month** - select the day of the month that you want this integration point to sync.
 - **The __ of the Month** - select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date** - the date that you want Integration Points to start syncing the data.
 - **End Date** - (Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time** - the time at which this integration point syncs. This time is local to your PC, not to the server.

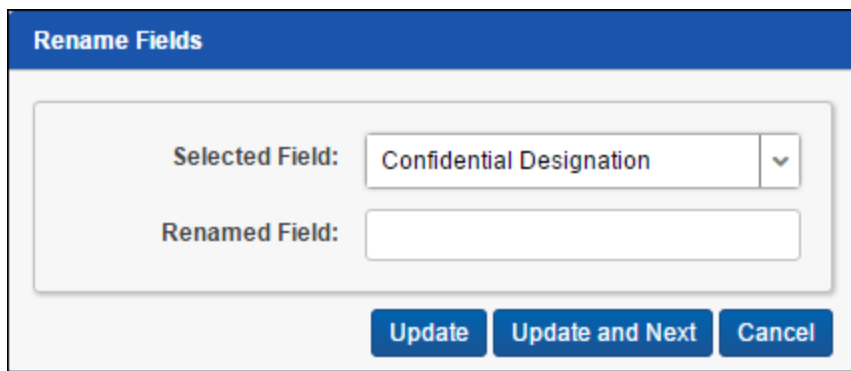
4. Click **Next** to advance to the Source Information layout.

4. Complete the following fields on the **Source Information** layout:

- **Source** - select **Production** from the drop-down list. specify that you want to select a production set, from which you want export the data in your load file. You'll select this folder below from the folder structure in the Folder + Subfolders field. You'll also need to select a View from the Views field.
- **Production Set** - click on the down arrow and select the production set that you want to act as the source for the load file. This field is only available if you've selected Production as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record** - select a record number that identifies the initial document for export. Integration Points, like the RDC, exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields** - choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.
- **Rename** - gives you the option of renaming the fields in your load file before exporting them. When you click this button, you're presented with the following settings in the Rename Fields window:



- **Selected Field** - displays the field that you've selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**- enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you don't change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** - click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** - click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** - click this to exit the Rename Fields window without applying further changes to current field names.

5. Click **Next** to advance to the Destination Information layout.

6. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel

i

Setup

Source Information

Destination Information

✓

✓

3

← Back

Save

Export Detail ?

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files:

☐

Destination Folder:

EDDS1064096\DataTransfer\Export\Documentation export directory_(Tim

▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format:

Select...

▼

Data File Format:

Relativity (.dat)

▼

Data File Encoding:

Unicode

▼

File Path:

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path:

☒

Export Multiple Choice Fields As Nested:

☐

FILE NAMING OPTIONS

Name Output Files After:

Identifier

▼

Append Original File Name:

☐

IMAGE

File Type:

Single page TIFF/JPEG

▼

Image Precedence:

Original Images

▼

Subdirectory Prefix:

IMG

001

NATIVE

Subdirectory Prefix:

NATIVE

001

TEXT

Text File Encoding:

Unicode

▼

Text Precedence:

Select...

...

Subdirectory Prefix:

TEXT

001

Volume & Subdirectory Detail

VOLUME

Prefix:

VOL

Start Number:

1

Number Of Digits:

2

Max Size (MB):

4400

SUBDIRECTORY

Start Number:

1

Number Of Digits:

3

Max Files:

500

Load File Options

- **Export Type** - this field reflects the type of export job you're running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder** - specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder** - check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format** - select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format** - select a the format for the document-level load file you're exporting:
 - Relativity (.dat) - load file exports with the standard Concordance delimiters.
 - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
 - Comma-separated (.csv)
 - Custom (.txt) - load file exports with the custom delimiters that you select.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths** - paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths** - paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path** - check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you're exporting.
- **Export Multiple Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After** - select one of the following naming convention for exported files:
 - **Identifier** - select this option to name the files after the identifier for your workspace.
 - **Begin production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select Produced Images as the Production Precedence below.
- **Append Original File Name** - select this option to append the original name of the file to the end of the exported file name.

Image - the following fields are only available if you selected Images for the Export Type field above.

- **File Type** - select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence** - select one of the following groups of produced documents for export instead of the original images:
 - **Original Images** - exports only the original, non-produced images.
 - **Produced Images** - exports a produced version of the images. When you select this, the following fields become available:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

Image Productions: November Production ...

Include Original Images If Not Produced: ☐

Subdirectory Prefix: IMG 001

- **Image Productions** - select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced** - exports only the original images in the event that they haven't been produced.
- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

Native

- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text - the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding** - select the encoding for the document-level text files
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of

the fields.

Select Text Precedence

Long Text Fields

Available:

- Alert
- Attachment Name
- Attorney Review Comments
- Conversation Index
- Document Folder Path
- Email Author Date ID
- Email BCC
- Email CC
- Email Subject
- Email Threading Display
- Email Threading ID
- Email To
- Embedded Data Info
- Extracted Text
- Lotus Notes Other Folders
- Privilege Description
- Processing Folder Path
- Search Hits
- Visualization
- Virtual path

Selected:

>| > < << << < > >>

OK Cancel

- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix** - enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits** - select the number of digits attached to the prefix. For example, if you select 2, the output is VOL001, VOL002, and so on.
- **Max Size (MB)** - select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number** - select the starting number for the subdirectories.
- **Number of Digits** - select the number of digits of the subdirectory prefix For example, if you select 3, the output is IMG001, IMG002, and so on.
- **Max Files** - select the number of files to store in each subdirectory.

7. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you'll be able to run it and export the data based on the settings you specified. See [Running the export job on page 72](#) for details.

5.4 Exporting a saved search to a load file

To create an integration point specifically for exporting a saved search, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:

The screenshot shows the 'Create Integration Point' dialog box. At the top, there's a title bar with 'Create Integration Point', a 'Cancel' button, and an information icon. Below the title bar is a progress bar with two steps: 'Setup' (1) and 'Complete the Setup' (2). The 'Setup' step is currently active. The dialog is divided into three sections: 'General', 'Advanced', and 'Scheduling'. The 'General' section contains the following fields: 'Name' (text input with 'Doc Export'), 'Type' (radio buttons for 'Import' and 'Export', with 'Export' selected), 'Source' (dropdown menu with 'Relativity' selected), 'Destination' (dropdown menu with 'Load File' selected), 'Transferred Object' (dropdown menu with 'Document' selected), 'Profile' (dropdown menu with 'Select...' selected), and 'Include in ECA Promote List' (radio buttons for 'Yes' and 'No', with 'No' selected). The 'Advanced' section contains 'Email Notification Recipients' (text input with 'Separate by semi-colon' as a hint) and 'Log Errors' (radio buttons for 'Yes' and 'No', with 'Yes' selected). The 'Scheduling' section contains 'Enable Scheduler' (radio buttons for 'Yes' and 'No', with 'No' selected). Navigation buttons 'Back' and 'Next' are located at the top right of the dialog.

- **Name** - the name of your integration for reference purposes.
- **Type** - select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
- **Source** - this is automatically set to **Relativity** since you're exporting data out of a Relativity workspace.

- **Destination** - select **Load File**. This is because you don't want to export directly to another Relativity workspace, but instead want to leverage the RDC export functionality, which is available on a subsequent layout only if you select Load File here.
- **Transferred Object** - select **Document**.
- **Profile** - use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
- **Email Notification Recipients** - enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons between addresses.
- **Log Errors** - select **Yes** or **No** to denote whether Relativity tracks item level errors.
 - If you select **Yes**, each job also logs any item level errors.
 - If you select **No**, Relativity doesn't log these item level errors.
 - Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler** - gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**- the interval at which Relativity syncs this integration point.
 - **Daily** - select this option to sync once every day.
 - **Weekly** - select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly** - select the day of the month that you want this integration point to sync once every month.
 - **Reoccur** - enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day _ the month** - select the day of the month that you want this integration point to sync.
 - **The __ of the Month** - select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."
 - **Start Date** - the date that you want Integration Points to start syncing the data.
 - **End Date** - (Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
 - **Scheduled Time** - the time at which this integration point syncs. This time is local to your PC, not to the server.

4. Click **Next** to advance to the Source Information layout.

4. Complete the following fields on the **Source Information** layout:

- **Source** - select **Saved Search** from the drop-down list. specify that you want to select a saved search, from which you want export the data in your load file. You'll select this folder below from the folder structure in the Folder + Subfolders field. You'll also need to select a View from the Views field.
- **Saved Search** - click on the down arrow and select the saved search that you want to act as the source for the load file. This field is only available if you've selected Saved Search as the source above.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Start Export at Record** - select a record number that identifies the initial document for export. Integration Points, like the RDC, exports the document with this record number and continues exporting documents with subsequent record numbers.
- **Source Fields | Selected Fields| Renamed Fields** - choose the fields that you want to export by moving them to the Selected Fields box. The box on the left displays all available source fields. The fields listed in the Selected Fields column are determined by what you select for the Source field above, as well by the folder, production set, or saved search that you select. Only the fields in the Selected Fields box on the right will be exported when you run the integration point. If you wish to rename the fields in your load file before exporting them, you can do so through the Rename option described below. The fields whose names you change are displayed in the Renamed Fields column.

- **Rename** - gives you the option of renaming the fields in your load file before exporting them. When you click this button, you're presented with the following settings in the Rename Fields window:

- **Selected Field** - displays the field that you've selected from the Source Fields column, the name of which you can change in the Renamed Field below.
- **Renamed Field**- enter the desired new name for the field. This name will appear in the Renamed Fields column of the layout once you click Update or Update and Next below. If you don't change the original name of the selected field, then the Renamed Fields column contains an empty row for that field.
- **Update** - click this button to update the selected field to the name you entered in the Renamed Field setting. When you do this, the renamed field appears in the Renamed Field column.
- **Update and Next** - click this button to update the selected field to the name you entered in the Renamed Field setting and then move to the next field in the Selected Field column. When you do this, the renamed field appears in the Renamed Field column and the next field appears in the Selected Field setting.
- **Cancel** - click this to exit the Rename Fields window without applying further changes to current field names.

5. Click **Next** to advance to the Destination Information layout.

6. Complete the following fields on the **Destination Information** layout:

Create Integration Point

Cancel

i

Setup

Source Information

Destination Information

✓

✓

3

← Back

Save

Export Detail ?

Export Type:

☒ Load File

☒ Images

☒ Natives

☒ Text Fields As Files

Overwrite Files:

☐

Destination Folder:

EDDS1064096\DataTransfer\Export\Documentation export directory_(Tim

▼

☒ Create Export Folder

Output Settings

LOAD FILE OPTIONS

Image File Format:

Select...

▼

Data File Format:

Relativity (.dat)

▼

Data File Encoding:

Unicode

▼

File Path:

☒ Relative

☐ Absolute

☐ User Prefix

Include Native Files Path:

☒

Export Multiple Choice Fields As Nested:

☐

FILE NAMING OPTIONS

Name Output Files After:

Identifier

▼

Append Original File Name:

☐

IMAGE

File Type:

Single page TIFF/JPEG

▼

Image Precedence:

Original Images

▼

Subdirectory Prefix:

IMG

001

NATIVE

Subdirectory Prefix:

NATIVE

001

TEXT

Text File Encoding:

Unicode

▼

Text Precedence:

Select...

...

Subdirectory Prefix:

TEXT

001

Volume & Subdirectory Detail

VOLUME

Prefix:

VOL

Start Number:

1

Number Of Digits:

2

Max Size (MB):

4400

SUBDIRECTORY

Start Number:

1

Number Of Digits:

3

Max Files:

500

Load File Options

- **Export Type** - this field reflects the type of export job you're running, which you specified on the Setup layout. By default, Load File is selected as the base configuration for your export job. You also have the option of enhancing the load file by selecting **Images**, **Natives**, and **Text Fields as Files**, depending on the makeup of your data. Selecting any of these makes additional corresponding output settings available, which are described below.
 - The Text Fields as Files option determines the export of the extracted text or OCR. Select this option if you want to export files as individual document-level text files, with one file per document. Integration Points includes text as part of your load file if you deselect this option and if a long text field is included in the selected fields that you mapped in the Source Information layout.
- **Destination Folder** - specify the folder into which you want to export the data from the load file. This reads the Default File Repository and lets you select a subfolder of that location.
- **Create Export Folder** - check this box to create an export folder named after the existing Relativity Integration Point job and the timestamp in your export folder. This will prevent the overwriting of any previous Relativity Integration Point exports to your export folder. When you check this box, the value displayed in the Destination Folder field is updated to reflect the [JobName]_[RunTimeStampUTC] information.
- **Image File Format** - select one of these formats for image-level load file:
 - Opticon
 - IPRO
 - IPRO (Full Text)
- **Data File Format** - select a the format for the document-level load file you're exporting:
 - Relativity (.dat) - load file exports with the standard Concordance delimiters.
 - HTML (.html) - load file is in HTML and contains hyperlinks to launch any exported files.
 - Comma-separated (.csv)
 - Custom (.txt) - load file exports with the custom delimiters that you select.
- **Data File Encoding** - select an encoding for the document-level load file from the drop-down box.
- **File Path** - controls how the export path for the files is referenced. Select one of the following options:
 - **Use absolute paths** - paths to exported files are represented as absolute paths. For example, C:\Desktop\VOL001\NATIVE001\AS000001.msg
 - **Use relative paths** - paths to exported files are represented as relative paths. For example, .\VOL001\NATIVE001\AS000001.msg
 - **Use prefix** - a prefix is added to the relative path, such as a CD drive letter. For example, D:\VOL001\NATIVE001\AS000001.msg
- **Include Native Files Path** - check this box if you want to include the native file path in your data once you export it. Note that in the load file, for example a Relativity.dat file, there will be file path information added for every record you're exporting.
- **Export Multiple Choice Fields as Nested** - select this option to maintain the hierarchy of Relativity multiple-choice lists, when applicable. The nested value delimiter, a backslash, separates child choices.
- **Name Output Files After** - select one of the following naming convention for exported files:
 - **Identifier** - select this option to name the files after the identifier for your workspace.
 - **Begin production number** - select this option to name the files after the production number. (This number may be the Bates number for a production.) Relativity names files after the production number only if you select select Produced Images as the Production Precedence below.
- **Append Original File Name** - select this option to append the original name of the file to the end of the exported file name.

Image - the following fields are only available if you selected Images for the Export Type field above.

- **File Type** - select one of these file types:
 - Single-page TIF/JPG
 - Multi-page TIF
 - PDF
- **Production Precedence** - select one of the following groups of produced documents for export instead of the original images:
 - **Original Images** - exports only the original, non-produced images.
 - **Produced Images** - exports a produced version of the images. When you select this, the following fields become available:

IMAGE

File Type: Single page TIFF/JPEG

Production Precedence: Produced Images

Image Productions: November Production ...

Include Original Images If Not Produced: ☐

Subdirectory Prefix: IMG 001

- **Image Productions** - select the produced images that you want to act as the precedence.
- **Include Original Images If Not Produced** - exports only the original images in the event that they haven't been produced.
- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported images. By default, this is set to IMG.

Native

- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported native files. By default, this is set to NATIVE. This field is only available if you selected Natives for the Export Type field above.

Text - the following fields are only available if you selected text Fields As Files for the Export Type field above.

- **Text File Encoding** - select the encoding for the document-level text files
- **Text Precedence** - select and assign an order to long text fields that Relativity checks for text when performing an export. You must select one or more long text fields to use this functionality. Click the ellipsis to display the Pick Text Precedence pop-up. To move fields between columns, highlight them and click the Right or Left single or double arrows. Use the Up and Down arrows to order the precedence of

the fields.

Select Text Precedence

Long Text Fields

Available:

- Alert
- Attachment Name
- Attorney Review Comments
- Conversation Index
- Document Folder Path
- Email Author Date ID
- Email BCC
- Email CC
- Email Subject
- Email Threading Display
- Email Threading ID
- Email To
- Embedded Data Info
- Extracted Text
- Lotus Notes Other Folders
- Privilege Description
- Processing Folder Path
- Search Hits
- Visualization
- Virtual path

Selected:

>| > < <<

<| < > >>

OK Cancel

- **Subdirectory Prefix** - enter the alpha prefix for the subdirectory that stores exported text files. By default, this is set to TEXT.

Volume

- **Prefix** - enter the alpha prefix for the volume identifier. By default, this is set to VOL.
- **Start Number** - select the first number used for the numeric section of the volume identifier. Multiple volumes increment numbers during export creating unique volume identifiers.
- **Number of Digits** - select the number of digits attached to the prefix. For example, if you select 2, the output is VOL001, VOL002, and so on.
- **Max Size (MB)** - select the maximum size allowed for each volume in MBs.

Subdirectory

- **Start Number** - select the starting number for the subdirectories.
- **Number of Digits** - select the number of digits of the subdirectory prefix For example, if you select 3, the output is IMG001, IMG002, and so on.
- **Max Files** - select the number of files to store in each subdirectory.

7. Click **Save** to save this integration point with these export settings.

Once Relativity saves the integration point, you'll be able to run it and export the data based on the settings you specified. See [Running the export job below](#) for details.

5.5 Exporting to a Relativity workspace

See the steps for exporting a source workspace to a destination workspace

In addition to exporting to a CSV and load file, you have the option of exporting data from a source workspace to a destination workspace in Relativity. You can do this by selecting **Relativity** as the destination for the data that you intend to transfer and then selecting a specific workspace where you want that data to go. This is the most efficient way to move documents from one workspace to another, since it's a one-step process and it doesn't require you to export and re-import your data.

Note the following details about exporting to a workspace:

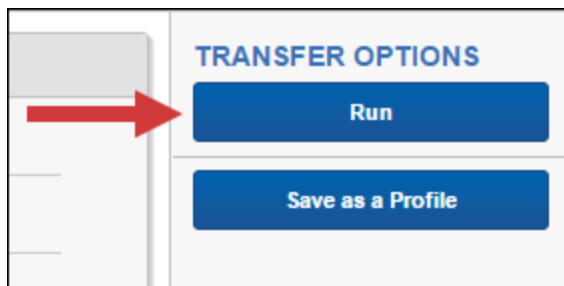
- For workspace-to-workspace integration points, Relativity supports transfers across the Document object only and not other RDO's.
- When using integration points to transfer data between workspaces, you can move original images and natives and/or metadata. You aren't required to have Integration Points installed on the destination workspace.
- When transferring images to a destination workspace, the field mapping section is disabled because only the control number is required and available in this scenario. If you want to transfer other field metadata, you must create a new integration point without choosing to copy images.
- Integration points uses the following delimiters to configure the Import API for the destination workspace. Other delimiters typically configured with the Import API, for example via the RDC, are not utilized:
 - Multi-value delimiter: ASCII 029
 - Nested-value delimiter: ASCII 030

5.6 Running the export job

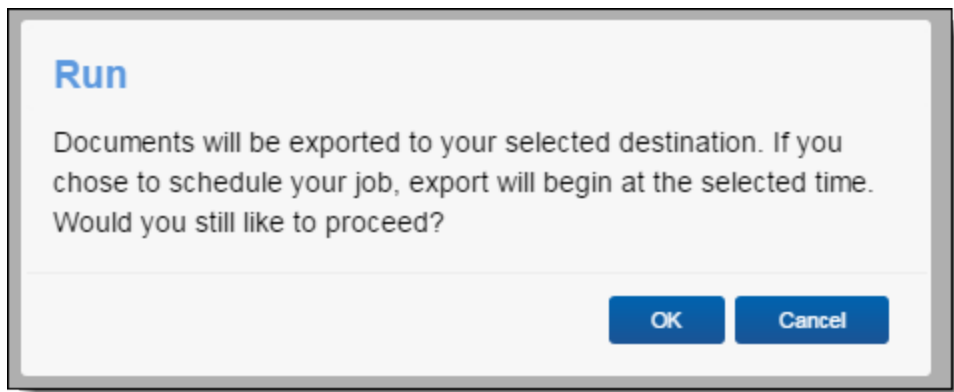
To export your load file based on the export settings you specified above, click **Run** on the Transfer Options console on the saved integration point.

Note: All Integration Points jobs are fully editable after run.

Note that you also have the option of saving this integration point as a profile through the Save as Profile button on the Transfer Options console. For more information on profiles, see [Integration Points profiles on page 10](#).



Click **OK** on the run confirmation message, which informs you of where your documents will be placed.



The Run button turns to red and gives you the option of stopping the job you just kicked off, as long as that job has a status of Pending or Processing.

If necessary, monitor the progress of the promote job by viewing the **Status** field in the **Status** view at the bottom of the layout. You'll see any of the following status values:

- **Pending** - the job has yet to be picked up by an agent.
- **Processing** - the agent has picked up the job and is in the process of completing it.
- **Completed** - the job is complete, and no errors occurred.
- **Completed with errors** - the job is complete and errors have occurred. You can view error details in the Job History Errors tab. See [Monitoring job history and errors on page 86](#) for details.
- **Error - job failed** - a job-level error occurred and the job didn't complete because it failed. You can view error details in the Job History Errors tab. See [Monitoring job history and errors on page 86](#) for details.
- **Stopping** - you clicked the Stop button, and the stop job has yet to be picked up by an agent.
- **Stopped** - the job has been stopped.

5.6.1 Stopping an export job

Relativity gives you the option of stopping an export job from proceeding in the event that you need to re-prioritize it or because you made a mistake when creating it. You can do so when that job has a status of Pending or Processing. To do this, click **Stop** on the console.

Integration Point Details

Record 2 of 12

Job started

General Scheduling

Name: Export Load File Log Errors: Yes

Export Type: Load file Has Errors: No

Source details: Saved search: All Documents Email Notification Recipients:

Destination details: FileShare: .\EDDS1017022\DataTransfer\Export Included in ECA Promote List: Yes

Overwrite files: No Total of Documents: 14547

Start at record: 1 Total of Images: 0 (0 Bytes)

Load file format: Relativity (.dat); Unicode

File path: Do not include; Relative

Text and Native File Names: Named after: Identifier

Multiple choice as nested: No

TRANSFER OPTIONS

Stop

Save as a Profile

Status

Items 1 - 2 (of 2)

Start Time (U...	Artifact ID	Name	Integration Po...	Job Type	Job Status	Destination W...	Destination In...	Items Transfe...	Total Items	Items with Err...
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)
3/22/2017 1:58 P	1042609	Export Load File	Export Load File	Run	Pending	ECA Dashboard - 1017022	This Instance	0		0

Relativity then informs you that you won't be removing any data by stopping the transfer and that you should check to make sure that the overwrite setting you previously entered is still appropriate for the re-run.

Click **Stop Transfer** to proceed.

Stop Transfer

Stopping this transfer will not remove any data that was transferred. When re-running this transfer, make sure that your overwrite settings will return expected results.

Stop Transfer **Cancel**

Once Relativity stops the job, the Job Status field on the Status view reflects this.

Status

Items 1 - 2 (of 2)

Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Worksp...	Items Transferred	Total Items	Items with Errors
9/21/2016 7:33 PM	1043050	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	200	733	0
9/21/2016 7:32 PM	1043048	ECA integration points	ECA integration points	Run	Stopped	Documentation Destination - 2934933	0		0

0 Selected Item(s) Select Page Size: 10

Note the following about stopping an Integration Points job:

- You can also stop a scheduled job if it has a status of Pending or Processing.
- A job is unstopable if it has any status other than Pending or Processing, or the point at which Relativity starts promoting documents with such as information as the user who tagged them and the source workspace.
- When you click Stop, Relativity immediately stops creating new errors for that job.

- When you click Stop on a run-now job, Relativity marks all errors associated with the current job history as Expired.
- When you click Stop on a retry job, Relativity marks all errors associated with the current job history and the previous job as Expired.
- You can start a scheduled job after you've already stopped it.
- The item counts on the Integration Points layout reflect all items promoted before the agent received the signal to stop the job.

To re-start a stopped job, click Run. When you do this, Relativity begins to transfer data again from the beginning but doesn't remove any data already transferred.

5.6.2 Integration point agent considerations

When you have one agent enabled, a scheduled integration points job is always queued and is always run. When you have more than one agent, however, the scheduled job may get queued or it may result in an error, after which that job is rescheduled. In other words, there is mixed behavior when you have enabled more than one agent.

The following table provides a breakdown of this behavior:

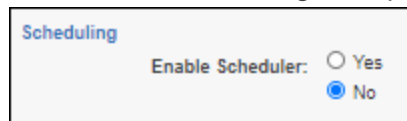
If	Then
<ol style="list-style-type: none"> 1. You enable a single agent called Agent 1. 2. You schedule a job called IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and completes it in one hour. 2. Agent 1 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 2 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 4. All other agents are busy, including Agent 2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 1 completes the Run or Retry Errors job for IP1. 3. Agent 1 picks up the scheduled job for IP1 and completes it.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You click Run or Retry Errors on IP1. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 2 picks up the Run or Retry Errors job for IP2 and begins working on it.

If	Then
3. You click Run or Retry Errors on IP2.	

5.7 Disabling an Integration Point sync

To disable an integration point sync, simply turn off the scheduler.

1. From the Integration Points landing page, click the Integration Point Name that you wish to disable.
2. Click **Edit**.
3. From the Import Scheduling section under Enable Scheduler, select **No**. This disables the scheduling mechanism for that integration point.



5.7.1 Scheduler date format considerations

The Integration Points scheduler accepts non-U.S. date formats to further accommodate, for example, users in Australia.

In this case, the default language in your browser settings is set to English (Australian) or any other language that would display a non-U.S. date format of day/month/year instead of /month/day/year.

Languages

Language
English (Australia) ^

Order languages based on your preference

English (Australia)
Google Chrome is displayed in this language

English (United States)

English

[Add languages](#)

Offer to translate pages that aren't in a language you read ☒

Spell check
English (United States) v

Relativity then properly displays the date when you select it for the Start and End Date fields in the Scheduling category.

Scheduling

Enable Scheduler: ☒ Yes ☐ No

Frequency: v

Start Date:

24/08/2017

End Date:

30/08/2017

Scheduled Time: v

Time Zone: v

This date format will also appear anywhere else in Relativity where a date is displayed, such as on the saved Integration Point Details layout and the Date Last Modified field on the Document list.

6 Promoting data between workspaces through Integration Points

You can use Integration Points to promote (move) data from one Relativity workspace to another Relativity workspace. This can be thought of as a one-way sync process from a source workspace to a destination workspace and not a back and forth syncing process between them.

Once you've tagged documents for inclusion in or exclusion from the data you want to promote for review, you can access Integration Points to start the job or jobs that will send those documents to the review workspace.

Note: For information on how to develop with Integration Points, visit the [Developers documentation site](#).

6.1 Special considerations for large sync workflows

We recommend configuring integration point jobs into batches for large sync workflows. The following are recommendations when creating job batches:

- Document count should be no more than 500,000 documents in a single batch.
- When including extracted text as a mapped field in the integration point job, the sum of the extracted text in the batch should not exceed 25 GBs.
- The recommended number of fields to be mapped should be no greater than 100, but it is best to map as few long text fields as possible.
- When using the append/overlay or overlay only configuration, the batch size recommendations should be half the amount described above, specifically:
 - 250,000 document count
 - 12.5 GBs extracted text sum

6.2 Integration point agent considerations

When you have one agent enabled, a scheduled integration points job is always queued and is always run. When you have more than one agent, however, the scheduled job may get queued or it may result in an error, after which that job is rescheduled. In other words, there is mixed behavior when you have enabled more than one agent.

The following table provides a breakdown of this behavior:

If	Then
<ol style="list-style-type: none">1. You enable a single agent called Agent 1.2. You schedule a job called IP1 to run at 10:00 AM daily.3. You click Run or Retry Errors on IP1 at 9:59:59 AM.	<ol style="list-style-type: none">1. Agent 1 picks up the Run or Retry Errors job for IP1 and completes it in one hour.2. Agent 1 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none">1. You enable Agent 1 and Agent 2.	<ol style="list-style-type: none">1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it.

If	Then
<ol style="list-style-type: none"> 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 	<ol style="list-style-type: none"> 2. Agent 2 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 4. All other agents are busy, including Agent 2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 1 completes the Run or Retry Errors job for IP1. 3. Agent 1 picks up the scheduled job for IP1 and completes it.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You click Run or Retry Errors on IP1. 3. You click Run or Retry Errors on IP2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 2 picks up the Run or Retry Errors job for IP2 and begins working on it.

6.3 Exporting to a Relativity workspace

In addition to exporting to a CSV and load file, you have the option of exporting data from a source workspace to a destination workspace in Relativity. You can do this by selecting **Relativity** as the destination for the data that you intend to transfer and then selecting a specific workspace where you want that data to go. This is the most efficient way to move documents from one workspace to another, since it's a one-step process and it doesn't require you to export and re-import your data.

Note the following details about exporting to a workspace:

- When using integration points to transfer data between workspaces, you can move original images and natives and/or metadata. You are not required to have Integration Points installed on the destination workspace.
- When transferring images to a destination workspace, the field mapping section is disabled because only the control number is required and available in this scenario. If you want to transfer other field metadata, you must create a new integration point without choosing to copy images.
- Integration points uses the following delimiters to configure the Import API for the destination workspace. Other delimiters typically configured with the Import API, for example via the RDC, are not utilized:
 - Multi-value delimiter: ASCII 029
 - Nested-value delimiter: ASCII 030

6.3.1 Setup

To create an integration point specifically for exporting a workspace, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:
 - **Name**—the name of your integration for reference purposes.
 - **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
 - **Source**—this is automatically set to **Relativity** since you're exporting data out of a Relativity workspace.
 - **Destination**—select **Relativity**. This is because you don't want to export directly to another Relativity workspace, but instead want to leverage the RDC export functionality, which is available on a subsequent layout only if you select Load File here.
 - **Transferred Object**—select the available Document or non-document object meta data you want to promote to the destination workspace. The non-document object must already exist in the destination workspace. The data promotion process will not transfer custom objects created by users in a workspace.

Note: You will need to create a new integration point for each object type that you want to export to the destination workspace.

- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons to separate email addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. If you select **Yes**, each job also logs any item level errors. If you select **No**, Relativity doesn't log these item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler** - gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to sync.
 - **The __ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."

- **Start Date**—the date that you want Integration Points to start syncing the data.
- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server

4. Click **Next** to advance to the Source Information layout.

6.3.2 Connect to Source

Continue create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields:

- **Source**—select a saved search or production from the drop-down list. specify that you want to select a folder, from which you want export the data in your load file. You'll select this folder below from the folder structure in the Folder field. You'll also need to select a View from the Views field.
- **Saved Search/Production**—select an existing saved search or production set. If your source is a saved search, click the ellipsis button for an alternative way to select a saved search.
- **Destination Workspace**—select an existing workspace to export your saved search or production to.
- **Location**—select a folder or production set as the destination location.
 - **Folder**—select the drop-down menu to expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you've selected Folder.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Production Set**—select a production set to export the data to. Click the plus sign to create a new production set.
- **Create Saved Search**—select Yes to create a saved search in the destination workspace. This saved search's name will take the name given to the integration point.

2. Click **Next** to advance to the Destination Information layout.

6.3.3 Map Fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:

- Use the Shift + click and Ctrl + click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client.
- Use the text search boxes above the Source and Destination lists to find a particular field.
- Use the single and double arrows or double-click a field to move selected fields between columns.
- Use the horizontal scroll bar in each column as needed to fully view long field names.
- Each column displays the number of fields available in that column. This allows you to quickly compare the number of mapped fields to make sure they match. If they do not match, an error will display when you attempt to save the Integration Point.

- The field names in the Destination column include the type of each field listed.
- Click the **Map Fields** button between the Source and Destination columns to automatically map all fields with matching names. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

Notes: If the WebAPIPath instance setting in the kCura.IntegrationPoints section isn't configured correctly after upgrade or installation, the Source field list is empty because it can't return any attributes, and you aren't able to map fields.

Note: You do not need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.

2. Complete the following Import Settings on the Map Fields layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are not able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Images**—choose to copy, or not copy, images to the destination workspace. Selecting **Yes** will copy images to your destination workspace. When Yes is selected, an Image Precedence field needs to be completed. Selecting **No** will not copy images to your destination workspace. When No is selected, a Copy Native Files needs to be completed.
 - **Image Precedence**—select **Original Images** or **Produced Images** to copy to the destination workspace.

- **Copy Native Files**—select **Physical Files**, **Links Only**, or **No** to copy any native files, links to the native files, or nothing while syncing data between the source repository and destination review workspaces.
 - **Physical files** —select to copy any native files from the repository workspace to the review workspace.
 - **Links only**—select to add links to the destination workspace that direct back to the source workspace documents. When choosing this option, be aware that if you delete the native files in the repository workspace or if you delete or archive the repository workspace, the links to the files will be broken in the review workspace. In this situation, if you wanted to maintain the files in the review workspace, you first need to promote the physical files to that workspace before deleting them from the repository workspace or before deleting or archiving the repository workspace.

Note: The Links Only option is enabled for system administrators only by default. Changing the default setting and enabling this option for other users may lead to unauthorized access to another workspace's files.

- **No**—select to not create additional copies of your natives.
 - Doing this maintains a single copy of that data file no matter how many times you use the document in your workspace.
 - You have the option of selecting No for an initial run of an integration point and then Yes for a subsequent run. Doing this saves you time on the initial job while then retaining copies of the native files on the final job.
 - The benefit of selecting No for this field is that you save on storage and speed, as it tells the system to look for a file path in the source workspace.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - Select **Read From Field** or **Read From Folder Tree** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting either makes the Folder Path Information field required below.
 - Select **No** if you don't want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
 - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
 - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field below.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
 - Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the

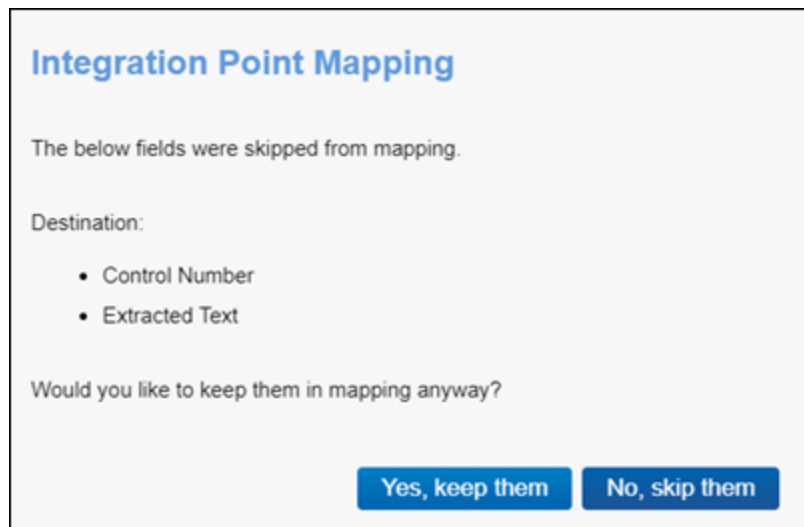
destination workspace's root folder; now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, you'd select Yes.

- Select **No** if you don't want to re-folder existing documents.
- **Copy Files to Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.

3. Click **Save** to save this integration point with these export settings.

Sync improves the field mapping process by validating fields in both the final step in the wizard. When fields can't be mapped from the Source to the Destination, a pop-up modal displays and states the fields that cannot be mapped.

You can either choose to keep the fields in the Source column or skip them and remove them.



Another solution that Integration Points Sync is providing is automatically remapping fields when the destination workspace is changed. When a user changes the destination workspace in either the integration point or integration point profile, fields can vary between the source and destination workspace. When the destination workspace is changed, the new fields in the workspace are automatically mapped.

The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. They are mapped so they the integration points job won't fail. This means that if the source workspace fields can't match to the new destination workspace fields, those unmatched are presented at the end of the mappings list for easy identification. Relativity also informs the user that the original source fields from the profile were mapped with corresponding fields from the destination workspace.

Once they are, a pop-up modal displays "We restored the fields mapping as destination workspace has changed."

Once Relativity saves the integration point, you'll be able to run it and export the data based on the settings you specified. See [Running the export job on page 72](#) for details.

6.4 Working with promoted documents

To view the documents you promoted to the review workspace, perform the following steps:

1. Navigate to the destination workspace.
2. Select the Saved Search browser and select the search you created to bring back documents that were promoted from the source workspace.
3. Note the following fields on the saved search view:
 - **Relativity Source Case** - the name of the workspace in which you tagged documents for inclusion and exclusion and from which you promoted your tagged documents to the review workspace.
 - **Relativity Source Job** - the name of the Integration Point that you used to promote tagged documents to the review workspace.

You can now review these documents and apply coding decisions for responsiveness and/or issues designation.

6.4.1 Reusing coding decisions

You can re-use the coding decisions you made on reviewed documents and promote them back into the source workspace through another Integration Point. For example, you could run another promote job to conduct a privilege overlay on documents in the source workspace.

To do this, perform the following steps:

1. Select the saved search you created to promote documents back to the source workspace.
2. Navigate to the **Integration Points** tab.
3. Create a new integration point that specifies the following values, which differ from those you entered for the promote job you ran previously:
 - **Destination Workspace**—select the original source workspace, specifically the workspace from which you previously promoted documents to the review workspace.
 - **Saved Search**—select the saved search you created to promote documents back to the source workspace.
 - **Field Mappings**—map only **Control Number (Object Identifier)** and **Privilege Designation**.
 - **Overwrite**—select **Overlay Only**.
4. Click **Run**.

7 Monitoring job history and errors

After you create an integration point and initiate the import process, you can monitor the job status on the Job History tab and resolve errors on the Job History Errors tab.

7.1 Job History

This tab lists an entry for each integration point job, and also provides you with the ability to view additional details for a specific job.

#	Job ID	Start Time (UTC)	Artifact ID	Name	Integration Point	Job Type	Job Status	Destination Workspace	Destination Instance	Items Transferred	Total Items	Items with Errors
1	1062	09/25/2019 11:51 AM	1116704	Operation 3 - Import by...	Operation 3 - Import by RI	Run	Error - job failed	Workspace RIP - 15076556	This Instance	5	2501	3348
2	1056	09/25/2019 11:23 AM	1114202	Operation 3 - Import by...	Operation 3 - Import by RI	Run	Completed with errors	Workspace RIP - 15076556	This Instance	0	2501	2501
3	1052	09/25/2019 10:49 AM	1114199	Operation 2 - Export to ...	Operation 2 - Export to file	Run	Completed with errors	Workspace RIP - 15076556	This Instance	2501	2501	0

The Job History tab lists the following information that you can use to monitor the status of an integration point job:

- **Start Time (UTC)** - the date and time that a job started running in Coordinated Universal Time (UTC).
- **Artifact ID** - the artifact ID of the workspace.
- **Name** - the name for a specific job run by the integration point.
- **Integration Point** - the name of the integration point used to run the job.
- **Job Status** - the current status of an integration point job. The following job statuses are available:
 - **[blank]** - the job hasn't started or wasn't run.
 - **Pending** - the job has been submitted but an agent hasn't picked it up, so the import process hasn't started.
 - **Suspending** - the system is performing the application update. The job prepares for being suspended, completing the current task.
 - **Suspended** - the system is performing the application update. The job has been suspended, and waits for the Integration Points agent to pick it up.
 - **Processing** - the job is currently running.
 - **Error - Job Failed** - a job-level error occurred and the import wasn't completed. The integration point may have been able to import some of the records before the error occurred.
 - **Completed with Errors** - the import job completed but at least one item-level error occurred. If you set the Log Errors field to Yes for the integration point, you can view the item-level errors in the section called Job History Errors on the Job Details layout. See [Viewing job history details on the next page](#).

Notes: When transferring custodians and associating them to managers, errors can occur. If transferring custodians and the manager isn't associated with a manager, the custodian transfer is completed successfully. It will show up as Completed with Errors even though the Items Transferred field and Total Items field will match, while the Items with Errors field states zero errors. This is because the custodian has been imported correctly, but the manager wasn't associated correctly.

- **Completed** - the import job completed without any item-level errors.
- **Destination Workspace** - the workspace specified as the destination for the transferred files.
- **Items Transferred** - the number of records successfully transferred when the job ran.
- **Total Items** - the total number of items originally designated to be transferred, including those that ended up having errors.
- **Items with Errors** - the number of records that the integration point failed to import due to item-level errors.

7.1.1 Viewing job history details

To view additional history information, click the name of a specific job listed on the Job History tab. The Job Details layout displays basic job information, import statistics, and a detailed list of errors.

The Job History Error section always logs job-level errors. If you set the Log Errors field to Yes, then it also logs item-level errors.

Job Details

Edit
Back
Edit Permissions
View Audit

Record 1 of 3

Job Details

Job ID: 1062
Name: Operation 3 - Import by RIP
Integration Point: Operation 3 - Import by RIP
Job Type: Run
Status: Error - job failed
Start Time (UTC): 9/25/2019 11:51 AM
End Time (UTC): 9/25/2019 12:27 PM

Import Statistics

Items Transferred: 5
Items with Errors: 3348

Only the first 1000 of 1501 Items displayed.

Job History Error

Items 1 - 10 (of 1,000)

<input type="checkbox"/>	Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
<input type="checkbox"/>	2b63dce2-1369-44b4-b015		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	242b9561-2ea8-46f0-8a51-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	4299edfa-9a4f-4138-a699-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	b12bcf44-7bbc-4fa1-a86c-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	1b57218d-2a4b-4ab1-a278		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	cc5cc432-8b56-4520-a0fa-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	30cd0793-44bc-4ec9-b5a2		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	b2cce3df-302d-494a-89a2-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	e89a9af7-4f6b-48d4-a356-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT
<input type="checkbox"/>	9bc0e410-5680-4f14-85c5-		Operation 3 - Import by RIP	IAP Identity value not set	New	Item	9/25/2019 12:28 PM GMT

0 Selected Item(s)
Select Page Size: 10

The Job Details layout includes many of the same fields displayed on the Job History tab. The following list includes the additional fields displayed in this layout:

- **End Time (UTC)** - the date and time that a job completed in UTC.
- **Source Unique ID** - the unique identifier for the record in the source that caused an error.
- **Error** - a brief description of the error that occurred.
- **Timestamp** - the date and time that a job error occurred in UTC.
- **Error Type** - indicates whether the error occurred at the job or item level.

7.2 Job History Errors

In the Job History Errors tab, you can use the condition lists at the top of the view to find errors based on any error-related metadata fields, such as Artifact ID, Error, Error Status, Error Type, JobHistory, Name, Source Unique ID, Stack Trace, System Created By, System Created On, System Last Modified On, and Timestamp (UTC).

#	Name	Source Unique ID	Job History	Error	Error Status	Error Type	System Created On
1	2b63dce2-1369-44b4-...		Operation 3 - Import by ...	IAPI Identity value not set	New	Item	09/25/2019 5:28 AM MST
2	242b9561-2ea8-46f0-...		Operation 3 - Import by ...	IAPI Identity value not set	New	Item	09/25/2019 5:28 AM MST
3	4299edfa-9a4f-4138-a...		Operation 3 - Import by ...	IAPI Identity value not set	New	Item	09/25/2019 5:28 AM MST
4	b12bcf44-7bbc-4fa1-a...		Operation 3 - Import by ...	IAPI Identity value not set	New	Item	09/25/2019 5:28 AM MST

Once you specify your conditions, you can search for the targeted errors by clicking **Search** on the right side of the condition lists.

You can then open any of the individuals errors returned in the list by clicking the **Name** value.

Job History Error Layout
Edit
Back
Edit Permissions
View Audit
Record 1 of 1000

Error Details

Name: 2b63dce2-1369-44b4-b015-235c3080bcb4
System Created On: 9/25/2019 12:28 PM

Source Unique ID:
System Created By: Service Account, Relativity

Job History: Operation 3 - Import by RIP
System Last Modified By: Service Account, Relativity

Error: IAPI Identity value not set

Error Status: New

Error Type: Item

Full Error: IAPI Identity value not set

The Job History Error Layout provides the following fields:

- **Name** - the system-generated name of the error.
- **Source Unique ID** - the identifier of the item in which the error occurred.
- **Job History** - the name of the integration point containing the file in which the error occurred.
- **Error** - the error message.

- **Error Status** - the current state of the error. You'll see any of the following values for the status field:
 - **New** - the error is new and no action has been taken on it yet.
 - **Expired** - the state assigned to an item level error in either of the following scenarios:
 - You received an item-level error on a job, you didn't retry the error, and the job ran on a schedule, meaning the Enable Scheduler field is set to Yes on the integration point.
 - You received an item-level or a job-level error, you didn't retry the error, and you click Run Now on the integration point, or it is a scheduled job.
 - **In Progress** - the error is currently in the process of being retried.
 - **Retried** - the item level error in a job has been retried, meaning you clicked Retry Errors on the integration point and the retry job is complete.
- **Error Type** - an indicator of whether the error is item or job-level.
- **Full Error** - the error message with details, including a stack trace of the error, when available.
- **System Created On** - the date and time at which the error was created by the agent during the integration point job.
- **System Created By** - the agent that created the error during the integration point job.
- **System Last Modified By** - the agent that last updated the status value of the error.

With the information provided in the Job History Errors Layout, you can identify those files on which errors occurred. You can then access those files to manually address the causes of those errors. From there, you can return to the integration points console and retry the errors.

7.2.1 Item-level versus job-level errors

Note the following differences in the way Relativity handles item-level and job-level errors.

Relativity handles a mix of item-level and job-level errors in the following way:

- When you click Run Now on an integration point that contains item and job-level errors, the entire job is re-run and all errors are marked as Expired.
- When you click Retry Errors on an integration point that contains item and job-level errors, the entire job is rerun and Relativity assigns a value of Expired to the item-level errors while job-level errors are marked as In Progress and then Retried.

Relativity handles item-level errors in the following way:

- When you click Run Now, the entire job is re-run, and Relativity assigns a value of Expired to the item-level errors.
- When you click Retry Errors, Relativity assigns a value of Retried to the item-level errors and starts a retry job containing only those error documents.

Relativity handles job-level errors in the following way:

- It registers only one job-level error for the integration point.
- When you click Run Now, the entire job is re-run and Relativity assigns a value of Expired to the job-level error.
- The Retry Errors and Run Now buttons are both available.
- The Retry Error button re-runs the whole job, but the job-level error is marked as In progress and then retried.
- The Run Now button re-runs the whole job, but the job-level error is marked as Expired.

Scheduled job is not inserted and an error is thrown that shows up in the errors tab in Admin mode that a scheduled job did not run for this integration because the job was already running.

Note: When you click Retry Errors, the retry job is automatically set to Append/Overlay mode.

8 Viewing destination workspaces

You can go to the Destination Workspace tab to view all of the workspaces that are designated as destinations for documents that you push through integration points.

	All Destination ...		Add Widget		No Dashboard S...		Export	
1 - 1 of 1 500 per page								
#	<input type="checkbox"/> Name	Destination Instance ...	Destination Instance...	Destination Workspac...	Destination Workspac...	Job History		
	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	= <input type="text" value="Filter"/>	<input type="text" value="Filter"/>	= <input type="text" value="Filter"/>	<input type="text" value="Filter"/>		
1	<input type="checkbox"/> This Instance - Docum...	This Instance	-1	Documentation [DO NOT DELETE]	3726327	Documentation		

The default All Destination Workspaces view provides the following fields:

- **Name** - the name given to the workspace, plus the artifact ID of the actual destination workspace.
- **Destination Workspace Name** - the name given to the destination workspace.
- **Destination Workspace Artifact ID** - the identifier of the destination workspace.
- **Job History** - a list of all the Job History entries associated with the destination workspace.

An individual destination workspace layout provides the following information in the associated **Document (Relativity Destination Case)** view.

Destination Workspace Layout		Edit Back Edit Permissions View Audit		Record 1 of 1	
Destination Workspace					
Name: This Instance - Documentation [DO NOT DELETE] - 3726327					
Only the first 1000 of 2496 items displayed.					
Document (Relativity Destination Case) Link Unlink				Items 1 - 10 (of 1,000)	
<input type="checkbox"/>	Artifact ID	Control Number	Relativity Destination Case	Job History	
<input type="checkbox"/>	(All) <input type="text" value="(All)"/>	(All) <input type="text" value="(All)"/>	Select...	Select...	
<input type="checkbox"/> Edit	1120328	AZIPPER_0007299	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120329	AZIPPER_0007300	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120333	AZIPPER_0007746	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120334	AZIPPER_0007747	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120335	AZIPPER_0007748	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120336	AZIPPER_0007749	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120337	AZIPPER_0007773	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120338	AZIPPER_0008358	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120339	AZIPPER_0008559	This Instance - Documentation [DO NOT DI	Documentation	
<input type="checkbox"/> Edit	1120340	AZIPPER_0008560	This Instance - Documentation [DO NOT DI	Documentation	
0 Selected Item(s)					Select Page Size: 10

- **ArtifactID** - the identifier of the document.
- **Control Number** - the control number of the document.
- **Relativity Destination Case** - a list of all the destination workspaces in which the document can be found.
- **Job History** - a list of audited actions associated with the document.

9 Microsoft Entra ID provider

Note: As of October 2023, Microsoft renamed Azure Active Directory (Azure AD) to Microsoft Entra ID. This site has been updated to reflect the name change, where applicable. Refer to [Microsoft documentation](#) for more information.

Relativity can import Entity (Employee/Custodian) data from Microsoft Entra ID through Integration Points. In Relativity, you will need to install Integration Points into your workspace. Once Integration Points is installed, you'll then need to install the Integration Points AD provider application. Completing these installations adds Integration Points to your workspace and adds Entra ID as a source within Integration Points.

The next step is to set up an application in Microsoft Azure which can be used to configure an Integration Point in Relativity. Only an Application Administrator with access can create an application, find credentials, and delete an application. If you don't have permissions, contact your admin. For more information on Application Administrators, see Microsoft's documentation.

The final step is to import Microsoft Entra ID into Relativity.

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](#).

9.1 Registering an Azure application and credentials

To create your application ID and secret, you must have Application Administrator privileges to log into your Azure Portal and register an app.

Start registering your app by following the steps below:

Note: The application registration process needs to be done by an Azure Administrator with sufficient privileges.

1. Open your [Azure Portal](#).
2. In the left-navigation menu, click **App registrations**.
3. Click **New Registration**.
This will open the Register an application page.
4. Enter an application name in the **Name** field.
5. Select **Accounts in this organizational directory only** as the supported account type.
6. Click **Register**.

For more information on registering an application in Azure, see Microsoft's documentation.

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 **Application Permissions**.

5. Select the following options from the Application Permissions section:
 - Directory – Directory.Read.All
 - Group – Group.Read.All
 - User – User.Read.All

Notes: Note: This permission is required if Filter by Group functionality is used.

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

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

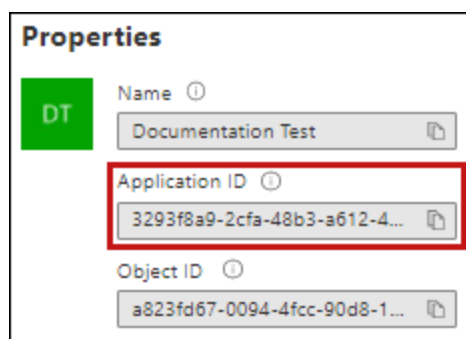
1. Click the **API Permissions** tab.
2. Click **Grant admin consent for [tenant]**.
3. In the pop-up window, click **Accept**.

9.2 Finding Azure credentials

If an application is already created and you need to find the application information to complete the Source Connection step, follow the steps below:

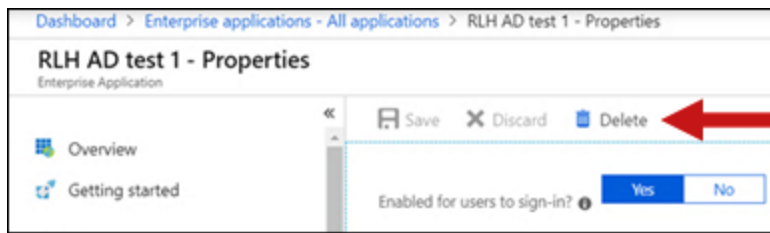
In the [Azure Portal](#),

1. Click Azure Active Directory.
2. In the left-navigation menu, click **Enterprise applications**.
3. In the list of applications, locate your application by filtering or sorting.
4. Click your application.
This will open the application page.
5. In the left-navigation menu, click **Properties**.
6. Copy the Application ID.



9.3 Removing application access

Removing access to an application can be done outside of Relativity in Microsoft Entra ID. To remove access, you need to log into Microsoft Entra ID. Locate and open the application. In the application, click **Delete**.



10 Promoting data between workspaces through Integration Points

You can use Integration Points to promote (move) data from one Relativity workspace to another Relativity workspace. This can be thought of as a one-way sync process from a source workspace to a destination workspace and not a back and forth syncing process between them.

Once you've tagged documents for inclusion in or exclusion from the data you want to promote for review, you can access Integration Points to start the job or jobs that will send those documents to the review workspace.

Note: For information on how to develop with Integration Points, visit the [Developers documentation site](#).

10.1 Special considerations for large sync workflows

We recommend configuring integration point jobs into batches for large sync workflows. The following are recommendations when creating job batches:

- Document count should be no more than 500,000 documents in a single batch.
- When including extracted text as a mapped field in the integration point job, the sum of the extracted text in the batch should not exceed 25 GBs.
- The recommended number of fields to be mapped should be no greater than 100, but it is best to map as few long text fields as possible.
- When using the append/overlay or overlay only configuration, the batch size recommendations should be half the amount described above, specifically:
 - 250,000 document count
 - 12.5 GBs extracted text sum

10.2 Integration point agent considerations

When you have one agent enabled, a scheduled integration points job is always queued and is always run. When you have more than one agent, however, the scheduled job may get queued or it may result in an error, after which that job is rescheduled. In other words, there is mixed behavior when you have enabled more than one agent.

The following table provides a breakdown of this behavior:

If	Then
<ol style="list-style-type: none">1. You enable a single agent called Agent 1.2. You schedule a job called IP1 to run at 10:00 AM daily.3. You click Run or Retry Errors on IP1 at 9:59:59 AM.	<ol style="list-style-type: none">1. Agent 1 picks up the Run or Retry Errors job for IP1 and completes it in one hour.2. Agent 1 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none">1. You enable Agent 1 and Agent 2.	<ol style="list-style-type: none">1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it.

If	Then
<ol style="list-style-type: none"> 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 	<ol style="list-style-type: none"> 2. Agent 2 picks up the scheduled job for IP1, creates an error, removes the job history from IP1, and reschedules IP1 to run at the next interval.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You schedule IP1 to run at 10:00 AM daily. 3. You click Run or Retry Errors on IP1 at 9:59:59 AM. 4. All other agents are busy, including Agent 2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 1 completes the Run or Retry Errors job for IP1. 3. Agent 1 picks up the scheduled job for IP1 and completes it.
<ol style="list-style-type: none"> 1. You enable Agent 1 and Agent 2. 2. You click Run or Retry Errors on IP1. 3. You click Run or Retry Errors on IP2. 	<ol style="list-style-type: none"> 1. Agent 1 picks up the Run or Retry Errors job for IP1 and begins working on it. 2. Agent 2 picks up the Run or Retry Errors job for IP2 and begins working on it.

10.3 Exporting to a Relativity workspace

In addition to exporting to a CSV and load file, you have the option of exporting data from a source workspace to a destination workspace in Relativity. You can do this by selecting **Relativity** as the destination for the data that you intend to transfer and then selecting a specific workspace where you want that data to go. This is the most efficient way to move documents from one workspace to another, since it's a one-step process and it doesn't require you to export and re-import your data.

Note the following details about exporting to a workspace:

- When using integration points to transfer data between workspaces, you can move original images and natives and/or metadata. You are not required to have Integration Points installed on the destination workspace.
- When transferring images to a destination workspace, the field mapping section is disabled because only the control number is required and available in this scenario. If you want to transfer other field metadata, you must create a new integration point without choosing to copy images.
- Integration points uses the following delimiters to configure the Import API for the destination workspace. Other delimiters typically configured with the Import API, for example via the RDC, are not utilized:
 - Multi-value delimiter: ASCII 029
 - Nested-value delimiter: ASCII 030

10.3.1 Setup

To create an integration point specifically for exporting a workspace, perform the following steps:

1. Navigate to the **Integration Points** tab.
2. Click **New Integration Point**.
3. Complete the following fields in the **Setup** category of the Create Integration Point layout:
 - **Name**—the name of your integration for reference purposes.
 - **Type**—select **Export** to designate this as an export job. Selecting this sets the Source field to be Relativity.
 - **Source**—this is automatically set to **Relativity** since you're exporting data out of a Relativity workspace.
 - **Destination**—select **Relativity**. This is because you don't want to export directly to another Relativity workspace, but instead want to leverage the RDC export functionality, which is available on a subsequent layout only if you select Load File here.
 - **Transferred Object**—select the available Document or non-document object meta data you want to promote to the destination workspace. The non-document object must already exist in the destination workspace. The data promotion process will not transfer custom objects created by users in a workspace.

Note: You will need to create a new integration point for each object type that you want to export to the destination workspace.

- **Profile**—use this to complete the remaining Integration Points settings based on the settings of a saved profile. This includes all of the fields in the Connect to Source layout, as well as field mappings. If no profiles exist in the workspace, you don't have the option of selecting them. To apply a profile that you've already created, select it from the drop-down list. For more information on profiles, see [Integration Points profiles on page 10](#).
- **Email Notification Recipients**—enter the email addresses of those who should receive notifications of whether the integration point export succeeded or failed. Use semi colons to separate email addresses.
- **Log Errors**—select **Yes** or **No** to denote whether Relativity tracks item level errors. If you select **Yes**, each job also logs any item level errors. If you select **No**, Relativity doesn't log these item level errors. Regardless of your selection, job-level errors are always recorded in Relativity.
- **Enable Scheduler** - gives you the option of scheduling additional exports. Selecting **Yes** makes the following fields available:
 - **Frequency**—the interval at which Relativity syncs this integration point.
 - **Daily**—select this option to sync once every day.
 - **Weekly**—select this option to sync on a weekly basis. You can specify how often in the **Reoccur** field, in which you'll provide a number value in the **Every # week(s)** choice. You can then specify on which day of the week the sync will take place by checking any of the days of the week listed.
 - **Monthly**—select the day of the month that you want this integration point to sync once every month.
 - **Reoccur**—enter the number of month(s) in which this integration point recurrently syncs.
 - **Send On**
 - **Day __ the month**—select the day of the month that you want this integration point to sync.
 - **The __ of the Month**—select this option for this integration point to sync on the chosen day of every month. For example, "The **Second Friday** of the month."

- **Start Date**—the date that you want Integration Points to start syncing the data.
- **End Date**—(Optional) the date that you want Integration Points to stop syncing the data. Leaving the End Date blank causes the Integration Point to run indefinitely at the scheduled interval.
- **Scheduled Time**—the time at which this integration point syncs. This time is local to your PC, not to the server

4. Click **Next** to advance to the Source Information layout.

10.3.2 Connect to Source

Continue create your import integration point by connecting Relativity to the data source. Follow the steps below.

1. In the **Connect to Source** layout complete the following fields:

- **Source**—select a saved search or production from the drop-down list. specify that you want to select a folder, from which you want export the data in your load file. You'll select this folder below from the folder structure in the Folder field. You'll also need to select a View from the Views field.
- **Saved Search/Production**—select an existing saved search or production set. If your source is a saved search, click the ellipsis button for an alternative way to select a saved search.
- **Destination Workspace**—select an existing workspace to export your saved search or production to.
- **Location**—select a folder or production set as the destination location.
 - **Folder**—select the drop-down menu to expand the folder structure, locate the folder from which you want to export the data, and select it. This field is only available if you've selected Folder.

Note: When creating an integration point based on a profile, if you change the saved search, folder, or production set on the Setup layout, the fields listed in the Selected Fields window below are not updated to reflect the new source that you selected. If you're not using a profile to creating the integration point, these fields are updated to reflect the newly selected source.

- **Production Set**—select a production set to export the data to. Click the plus sign to create a new production set.
- **Create Saved Search**—select Yes to create a saved search in the destination workspace. This saved search's name will take the name given to the integration point.

2. Click **Next** to advance to the Destination Information layout.

10.3.3 Map Fields

Map the attributes or fields so that Integration Points imports the targeted data into specific Relativity fields.

1. In the **Map Fields** wizard, you have the following options for mapping fields:

- Use the Shift + click and Ctrl + click method to select multiple fields at a time, similar to field mapping in the Relativity Desktop Client.
- Use the text search boxes above the Source and Destination lists to find a particular field.
- Use the single and double arrows or double-click a field to move selected fields between columns.
- Use the horizontal scroll bar in each column as needed to fully view long field names.
- Each column displays the number of fields available in that column. This allows you to quickly compare the number of mapped fields to make sure they match. If they do not match, an error will display when you attempt to save the Integration Point.

- The field names in the Destination column include the type of each field listed.
- Click the **Map Fields** button between the Source and Destination columns to automatically map all fields with matching names. If you have Destination fields that are mapped to Fields in the Field Catalog, Relativity tries to find name matches between these Catalog Fields, as well.

Notes: If the WebAPIPath instance setting in the kCura.IntegrationPoints section isn't configured correctly after upgrade or installation, the Source field list is empty because it can't return any attributes, and you aren't able to map fields.

Note: You do not need to map all attributes or fields. Only the Unique Identifier and Object Identifier are required. The Unique Identifier should contain a value that no other item in the workspace contains. For example, use the GUID or distinguishedName attribute. The Object Identifier is the specific field on the object that holds the displayed identifier, which might not be unique. For example, the Full Name field is the Object Identifier of the Entity RDO but it might not be unique. These two identifier values can be the same.

2. Complete the following Import Settings on the Map Fields layout:

- **Overwrite**—determines how the system overwrites records once you promote data to the review workspace. This field provides the following choices:
 - **Append Only**—promote only new records into the review workspace.
 - **Overlay Only**—update existing records only in the review workspace. Any documents with the same workspace identifier are overlaid. This field acts as a link indicating to Relativity where to import the data. When you select this or Append/Overlay, you must complete the Multi-Select Field Overlay Behavior field described below.
 - **Append/Overlay**—adds new records to the review workspace and overlays data on existing records. When you select this or Overlay Only, you must complete the Multi-Select Field Overlay Behavior field described below. You are not able to create folders or re-folder documents when you select Append/Overlay.
- **Multi-Select Field Overlay Behavior**—determines how the system will overlay records when you push documents to the review workspace. This field is only available if you've selected either Overlay Only or Append/Overlay above. This field provides the following choices:
 - **Merge Values**—merges all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Replace Values**—replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace, regardless of the overlay behavior settings in the environment.
 - **Use Field Settings**—merges or replaces all values for multi-choice and multi-object fields in the source data with corresponding multi-choice and multi-option fields in the workspace according to the overlay behavior settings in the environment.
- **Copy Images**—choose to copy, or not copy, images to the destination workspace. Selecting **Yes** will copy images to your destination workspace. When Yes is selected, an Image Precedence field needs to be completed. Selecting **No** will not copy images to your destination workspace. When No is selected, a Copy Native Files needs to be completed.
 - **Image Precedence**—select **Original Images** or **Produced Images** to copy to the destination workspace.

- **Copy Native Files**—select **Physical Files**, **Links Only**, or **No** to copy any native files, links to the native files, or nothing while syncing data between the source repository and destination review workspaces.
 - **Physical files** —select to copy any native files from the repository workspace to the review workspace.
 - **Links only**—select to add links to the destination workspace that direct back to the source workspace documents. When choosing this option, be aware that if you delete the native files in the repository workspace or if you delete or archive the repository workspace, the links to the files will be broken in the review workspace. In this situation, if you wanted to maintain the files in the review workspace, you first need to promote the physical files to that workspace before deleting them from the repository workspace or before deleting or archiving the repository workspace.

Note: The Links Only option is enabled for system administrators only by default. Changing the default setting and enabling this option for other users may lead to unauthorized access to another workspace's files.

- **No**—select to not create additional copies of your natives.
 - Doing this maintains a single copy of that data file no matter how many times you use the document in your workspace.
 - You have the option of selecting No for an initial run of an integration point and then Yes for a subsequent run. Doing this saves you time on the initial job while then retaining copies of the native files on the final job.
 - The benefit of selecting No for this field is that you save on storage and speed, as it tells the system to look for a file path in the source workspace.
- **Use Folder Path Information**—use a metadata field to build the folder structure for the documents that you promote to the review workspace.
 - Select **Read From Field** or **Read From Folder Tree** to use a metadata field to build the folder structure for the documents that you promote to the review workspace. Selecting either makes the Folder Path Information field required below.
 - Select **No** if you don't want to build a folder structure based on metadata. In this case, Relativity loads all documents directly into the folder indicated by the promote destination, and you create no new folders in the destination workspace.
 - You have the option of creating folders or re-folding documents when you select Append/Overlay for the Overwrite field.
 - You have the option of re-folding documents for the Overwrite field through the Move Existing Documents field below.
- **Folder Path Information**—specify a metadata field to build the folder structure for the documents that you promote to the review workspace.
- **Move Existing Documents**—re-folder documents that were previously imported into the destination workspace, but were only placed in the root case folder and not to any subfolders. This field is useful for situations in which you want to add new data to the destination workspace while overlaying existing data.
 - Select **Yes** to move existing documents into the folders provided in the Folder Path Information field. For example, you previously imported custodian Sally Smith's files into the

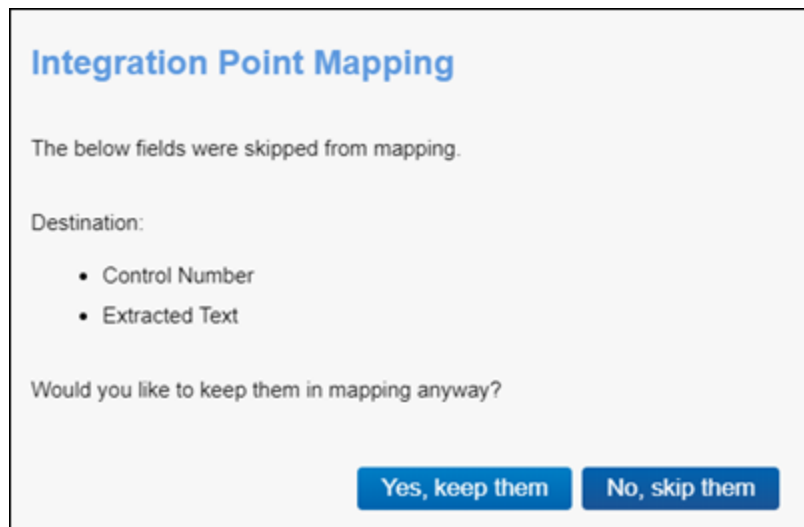
destination workspace's root folder; now, in addition to placing the documents from the saved search specified in this integration point in their subfolder, you also want to move those previously migrated documents into Sally Smith's subfolder, you'd select Yes.

- Select **No** if you don't want to re-folder existing documents.
- **Copy Files to Repository**—determines whether or not Relativity will copy files from the location in the image load file field to a selected document repository.
 - **Yes**—select this to copy files to a document repository that you select in the File Repository field below.
 - **No**—select this if the native files already reside in their final location, which is accessible by Relativity.

3. Click **Save** to save this integration point with these export settings.

Sync improves the field mapping process by validating fields in both the final step in the wizard. When fields can't be mapped from the Source to the Destination, a pop-up modal displays and states the fields that cannot be mapped.

You can either choose to keep the fields in the Source column or skip them and remove them.



Another solution that Integration Points Sync is providing is automatically remapping fields when the destination workspace is changed. When a user changes the destination workspace in either the integration point or integration point profile, fields can vary between the source and destination workspace. When the destination workspace is changed, the new fields in the workspace are automatically mapped.

The artifacts are mapped based on their names only if the ArtifactIDs are different in the new destination workspace. They are mapped so they the integration points job won't fail. This means that if the source workspace fields can't match to the new destination workspace fields, those unmatched are presented at the end of the mappings list for easy identification. Relativity also informs the user that the original source fields from the profile were mapped with corresponding fields from the destination workspace.

Once they are, a pop-up modal displays "We restored the fields mapping as destination workspace has changed."

Once Relativity saves the integration point, you'll be able to run it and export the data based on the settings you specified. See [Running the export job on page 72](#) for details.

10.4 Working with promoted documents

To view the documents you promoted to the review workspace, perform the following steps:

1. Navigate to the destination workspace.
2. Select the Saved Search browser and select the search you created to bring back documents that were promoted from the source workspace.
3. Note the following fields on the saved search view:
 - **Relativity Source Case** - the name of the workspace in which you tagged documents for inclusion and exclusion and from which you promoted your tagged documents to the review workspace.
 - **Relativity Source Job** - the name of the Integration Point that you used to promote tagged documents to the review workspace.

You can now review these documents and apply coding decisions for responsiveness and/or issues designation.

10.4.1 Reusing coding decisions

You can re-use the coding decisions you made on reviewed documents and promote them back into the source workspace through another Integration Point. For example, you could run another promote job to conduct a privilege overlay on documents in the source workspace.

To do this, perform the following steps:

1. Select the saved search you created to promote documents back to the source workspace.
2. Navigate to the **Integration Points** tab.
3. Create a new integration point that specifies the following values, which differ from those you entered for the promote job you ran previously:
 - **Destination Workspace**—select the original source workspace, specifically the workspace from which you previously promoted documents to the review workspace.
 - **Saved Search**—select the saved search you created to promote documents back to the source workspace.
 - **Field Mappings**—map only **Control Number (Object Identifier)** and **Privilege Designation**.
 - **Overwrite**—select **Overlay Only**.
4. Click **Run**.

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