

# ATIPXpress

## Relativity Integration

v11.11.0

February 2025



OPEXUSTECH.COM

© AINS LLC, 2025

# ATIPXpress v11.11.0 Relativity Integration

## Notice of Rights

Copyright © 2025, OPEXUS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: OPEXUS, LLC. For information on obtaining permission for reprints and excerpts, contact [info@opexustech.com](mailto:info@opexustech.com).

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

## Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (OPEXUS, LLC.) on an “As Is” basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

## Notice of Trademarks

The publisher’s company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: OPEXUS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

## Non-Disclosure Statement

This document’s contents are confidential and proprietary to OPEXUS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from OPEXUS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

## Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of OPEXUS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.



# Contents

- 1 Introduction ..... 4
  - 1.1 About Relativity Integration ..... 4
  - 1.2 Relativity Integration Prerequisites..... 4
- 2 Relativity Integration Configuration ..... 5
  - 2.1 Relativity Connector Settings ..... 5
  - 2.2 Configure Scheduler for Relativity ..... 6
  - 2.3 Configure Redaction Codes..... 7



# 1 Introduction

## 1.1 About Relativity Integration

Users must configure their application settings prior to integrating ATIPXpress with Relativity. This manual outlines the requirements and steps for configuring ATIPXpress for Relativity integration.

## 1.2 Relativity Integration Prerequisites

Complete the following steps to ensure your ATIPXpress application is ready to be configured for Relativity integration:

1. If you are not on ATIPXpress version 11.3.0 or higher, upgrade the application first. Follow the steps in the ATIPXpress Deployment Manual to upgrade your application.
2. Upgrade the application license in the *Administration* settings.

**(!!) Note: The Relativity feature is tied to your application license, and the feature is automatically enabled with the appropriate license. Please upgrade your license to include the Relativity integration.**

3. Ensure that the Relativity integration is enabled in the *Application Features* menu (**Administration > Features and Licenses > Application Features**). It should be enabled automatically after upgrading your license. If not enabled after upgrading your license, select the **Relativity Integration** checkbox and save the configuration.
4. The *Relativity Connector Settings* menu should be visible when accessing **Administration > Document Management**. If the menu is not visible, log out of the application and log back in.

Once these prerequisites have been met, you can set configurations within the application to enable Relativity.



## 2 Relativity Integration Configuration

The following subsections outline each step necessary to successfully enable Relativity.

### 2.1 Relativity Connector Settings

Follow the steps below to configure the Relativity Connector Settings:

**(!!) Note: Relativity Admin credentials are required to view all workspaces and production sets, and to allow importing of production sets/documents.**

1. Navigate to the *Relativity Connector Settings* menu (**Administration > Document Management > Relativity Connector Settings**):

2. First, select the **Enable Relativity Connector** checkbox.
3. Change the *Relativity Site URL* to the host name of the Relativity site you wish to use.
4. Set the desired **Authentication Mode**. We recommend using *Bearer Token* authentication. Alternatively, you can select *Basic* authentication.
  - a. *Bearer Token*: Use the following link to create a bearer token in Relativity. Here you can obtain the *Client ID* and *Client Secret* for the token:  
[https://help.relativity.com/RelativityOne/Content/Relativity/Authentication/OAuth2\\_clients.htm](https://help.relativity.com/RelativityOne/Content/Relativity/Authentication/OAuth2_clients.htm)



## Configuring Relativity Integration

OAuth2 Client Information

Name

RelativityFXBearerToken

Enabled

Yes

Flow Grant Type

Client Credentials

Context User

Admin, Relativity

Access Token Lifetime

512,640 minutes

Is System

No

Client Id

Client Secret

- b. *Basic Authentication*: If using *Basic* authentication, enter the associated Relativity Username and Password in the fields provided.

5. Click **Save** to save the settings.

## 2.2 Configure Scheduler for Relativity

You'll need to configure the Scheduler to run the Relativity Document Import job.

1. Go to **Administration > System Administration > Scheduler Configuration**
2. Add the Relativity Import Production Sets Job.

Job Name	Is System Job?	Instances	Remove
Sends all outgoing email messages	Yes	<input type="text" value="1"/>	×
EDR - Jobs	No	<input type="text" value="1"/>	×
EDR Search Criteria	No	<input type="text" value="1"/>	×
Send/Save Documents for Consultation	No	<input type="text" value="1"/>	×
Add collaboration Documents to Request folder	No	<input type="text" value="1"/>	×
Save To Disk	No	<input type="text" value="1"/>	×
Document Delivery	No	<input type="text" value="1"/>	×

Relativity Import Production Sets Job

☐ Check All

☐ Delete Scheduler Trace Files

☒ Relativity Import Production Sets Job

Add New Jobs

Save Refresh Close

3. Click **Save** to save your settings.



## 2.3 Configure Redaction Codes

All Relativity markup codes must also be present in ATIPXpress. If any Relativity codes are not also included in AX, attempting to import Relativity documents will throw an error. Follow the steps below to ensure that your AX environment is configured for all markup codes:

1. Log in to Relativity, then navigate to *Workspaces* and select your workspace.
2. Go to **Case Admin > Markup Sets**.
3. Note the markup codes configured in Relativity. This full list must be reflected in ATIPXpress Administration.
4. Log in to ATIPXpress, then navigate to **Administration > Document Management > Redaction Codes**.
5. Compare the listed Redaction Codes to ensure they match the Relativity Markup Codes.
6. If any Relativity markup codes are not present in ATIPXpress, use the **New** option to add the missing codes. Be sure to mark "Include in Annual Report" for any codes that should be reported in the Annual Report.

