

ATIPXpress

Using Relativity with ATIPXpress

v11.11.0

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1 Relativity Integration

ATIPXpress integrates with the Relativity eDiscovery tool, allowing organizations using Relativity to seamlessly port document data from Relativity, deliver Relativity documents to requesters and PAL, and run reports on Relativity document data.



This is a limited integration that allows for capturing data and pushing documents out to requesters (and PAL). Notably, the Relativity documents are never stored in ATIPXpress. ATIPXpress only stores Relativity document metadata including Redaction information (for use in Annual Reports).

To maintain data integrity, each Relativity document can only be added to a request one time. This prevents both duplication and potential versioning concerns by maintaining a single version of a document.

2 Add Documents from Relativity

You'll access Relativity through the *Add/Search/View* documents interface (accessible via the **Add/Search/View** link in the left-hand navigation). Locate the *Request Folder Documents* workspace, then click **Add Documents From Relativity** to access the integration interface:

Request Information

Assign Users

Correspondence

Request for Documents (0/0)

Add/Search/View Documents (0/1)

Fees/Billing

Final Actions

Deliver Documents

Stop the Clock

Notes (0)

Task Reminders (0/0)

Extensions (0/0)

Review Log Documents

Add Documents

Add Documents From DM

Add From Correspondence Log

Refresh

☐ File Cabinet

GUID

Document

Created Date

Date Added

Sections

Pages

Redacted?

Recent Layer Modified By

There are no review logs to display

1

Page size: 20

0 items in 1 pages

Open Documents

Open All Documents

Note: To remove documents from the Review Log you must select and Open the document(s) in Document Management.

Request Folder Documents

Add Documents

Add Documents From DM

Add Documents From Relativity

Add From Correspondence Log

Refresh

☐ File Cabinet

GUID

Document

Created Date

Date Added

Sections

Pages

Redacted?

Delivery Status

☐ FCD

00000000214

88mb

8/7/2023

8/7/2023

0

1

No

No Pages Deli...

1

Page size: 20

1 items in 1 pages

Open Documents

Open All Documents

Note: To remove documents from the Request Folder you must select and Open the document(s) in Document Management.

The *Production Sets* interface appears as shown below.

(!!) Note: The interface may take a short time to load as it retrieves data from Relativity.



Add Documents from Relativity

The screenshot shows the 'Production Sets' window. At the top, the 'Production Set Information' section (B) contains fields for Production Set Name, ID, Workspace Name, ID, and a dropdown for 'Added To Request' (currently set to 'No'). Below this are fields for 'Add To File Cabinet Drawer' (set to 'FCD (123)') and 'Sub Requests*' (set to 'Default'). To the right of these fields are buttons for 'Search', 'Clear', and 'Close'. Below the information section is the 'Production Sets Found' list (A), which is a table with columns: Production Set Name, Production Set ID, Workspace Name, Workspace ID, Created Date, and Added To Request. The table lists 15 items, including 'Sample Production', 'ProdSet OpexusTest', 'JPEGTest', 'ProdSetTest', 'TiffTest', 'TestJpeg', 'TestTif', 'file types', 'unstaged', 'mark up', 'TestJpeg7thAug', 'Testtiff7thAug', and 'set'. At the bottom of the window are buttons for 'View Production Set' (C) and 'Add To Request' (D), along with a 'Page size' dropdown (set to 20) and a status bar indicating '15 items in 1 pages'.

<input type="checkbox"/>	Production Set Name	Production Set ID	WorkSpace Name	WorkSpace ID	Created Date	Added To Request
<input type="checkbox"/>	Sample Production	1036354	Relativity Starter Template	1015024	8/13/2010 4:07:...	No
<input type="checkbox"/>	ProdSet OpexusTest	1040062	Sample Workspace	1018203	7/5/2023 6:33:0...	No
<input type="checkbox"/>	JPEGTest	1040081	RushabhWorkspaceTest	1019085	7/23/2023 11:5...	No
<input type="checkbox"/>	ProdSetTest	1040072	RushabhWorkspaceTest	1019085	7/5/2023 4:10:3...	No
<input type="checkbox"/>	TiffTest	1040085	RushabhWorkspaceTest	1019085	7/24/2023 12:0...	No
<input type="checkbox"/>	TestJpeg	1040106	OPEXUSTest	1104622	7/26/2023 6:35:...	No
<input type="checkbox"/>	TestTif	1040102	OPEXUSTest	1104622	7/26/2023 6:34:...	No
<input type="checkbox"/>	file types	1040115	TestFiles	1125213	8/2/2023 7:19:0...	No
<input type="checkbox"/>	unstaged	1040111	Unstaged	1125980	8/8/2023 1:30:3...	No
<input type="checkbox"/>	mark up	1040101	codes	1144686	8/3/2023 9:38:3...	No
<input type="checkbox"/>	TestJpeg7thAug	1040122	Test7thAug	1209715	8/7/2023 4:21:0...	No
<input type="checkbox"/>	Testtiff7thAug	1040118	Test7thAug	1209715	8/7/2023 4:19:2...	No
<input type="checkbox"/>	set	1040121	Code Workspace	1213732	8/7/2023 10:31:...	No

By default, the (A) *Production Sets Found* list includes all Relativity Production Sets which haven't been added to a Request.

You can use the (B) *Production Set Information* interface to search for specific production sets, which narrow down the results in the *Production Sets Found* list.

If you select a Production Set from the list, you'll enable the option to (C) **View Production Set**. Selecting this option opens Relativity in a new tab, where you can view the document in the selected Production Set(s). Only one Production Set can be selected and opened at a time.

(!!) Note: You must have a Relativity account with relevant permissions to access and view the production sets in Relativity.

After selecting at least one Production Set, you'll also have the option to (D) **Add to Request**. Be sure to select the correct File Cabinet Drawer from the *Add to File Cabinet Drawer* drop-down and select from the Sub Requests list (if applicable).

(!!) Notes:



- If a production set is already present in a different file cabinet drawer, it is not downloaded again, and instead the system will refer to the file cabinet drawer where the set was originally downloaded.
- After you select Add to Request, a *Job Progress* window appears while the documents are added.

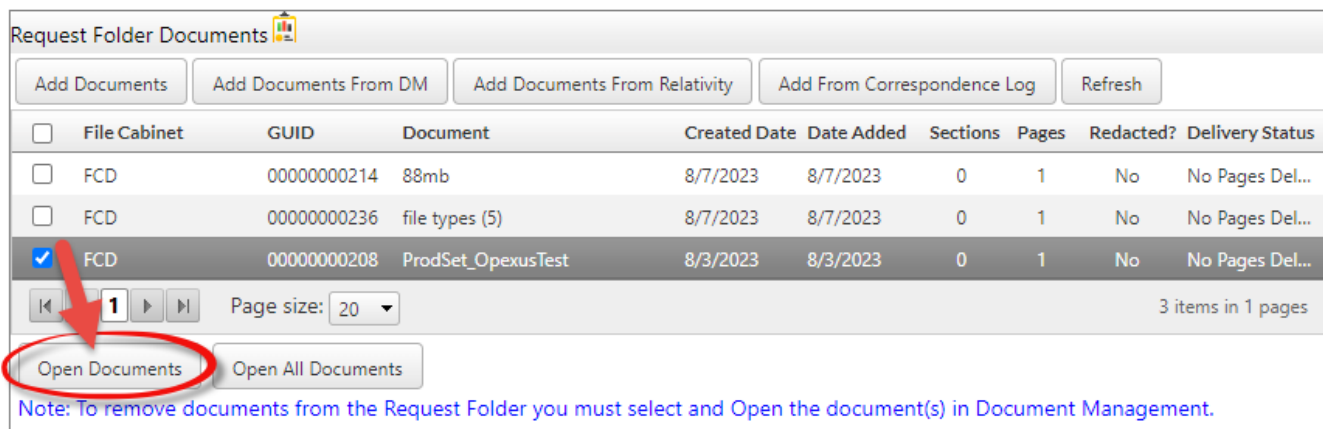


3 Managing Relativity Documents in Document Management

You can manage documents added to Requests from Relativity using the Document Management interface. This includes options to download the documents in native format, and to remove documents you've added from Relativity.

3.1 Open Documents in DM

To open Relativity documents via Document Management, first open the associated Request and navigate to the *Add/Search/View Documents* tab. From here, move to the *Request Folder Documents* workspace and select the Relativity document(s) you'd like to manage and select **Open Documents** (or **Open All Documents** to open all listed documents).



The screenshot shows the 'Request Folder Documents' interface. At the top, there are buttons: 'Add Documents', 'Add Documents From DM', 'Add Documents From Relativity', 'Add From Correspondence Log', and 'Refresh'. Below these is a table with columns: File Cabinet, GUID, Document, Created Date, Date Added, Sections, Pages, Redacted?, and Delivery Status. The table contains three rows of document data. The third row is selected, indicated by a blue checkmark in the 'File Cabinet' column. Below the table, there are navigation controls (back, forward, first, last) and a 'Page size' dropdown set to 20. At the bottom, the 'Open Documents' button is circled in red, with a red arrow pointing to it from the left. The 'Open All Documents' button is also visible. A note at the bottom states: 'Note: To remove documents from the Request Folder you must select and Open the document(s) in Document Management.'

<input type="checkbox"/>	File Cabinet	GUID	Document	Created Date	Date Added	Sections	Pages	Redacted?	Delivery Status
<input type="checkbox"/>	FCD	00000000214	88mb	8/7/2023	8/7/2023	0	1	No	No Pages Del...
<input type="checkbox"/>	FCD	00000000236	file types (5)	8/7/2023	8/7/2023	0	1	No	No Pages Del...
<input checked="" type="checkbox"/>	FCD	00000000208	ProdSet_OpexusTest	8/3/2023	8/3/2023	0	1	No	No Pages Del...

Document Management opens in a new tab. From here you'll have the options to:

- Download Native Relativity Documents from DM
- Remove Relativity Documents from Requests

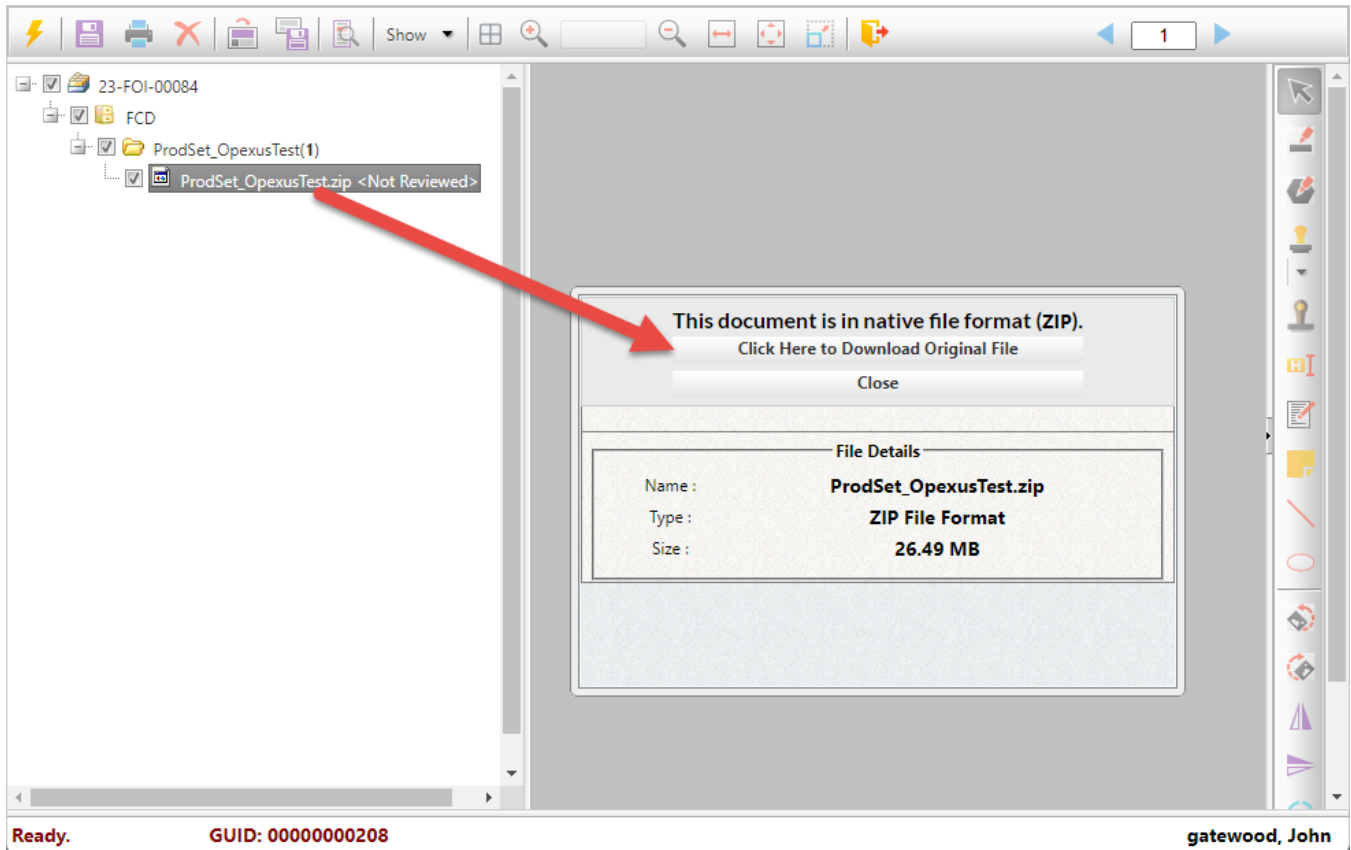
3.2 Download Native Relativity Documents from DM

Since we only hold the redacted documents in the ATIPXpress file servers, we provide the option to download the Relativity files via the DM interface.

First, open the Request containing the documents you want to download, navigate to the *Add/Search/View Documents* interface, then select the documents from the *Request Folder*



Documents workspace and click **Open Documents**. The document(s) open in DM, where you can select the sets from the left-hand navigation:



After selecting a set, a pop-up appears with details about the set. It also includes the option to **Click Here to Download Original File**. Select this option to download the production set as a .zip file to your local machine.

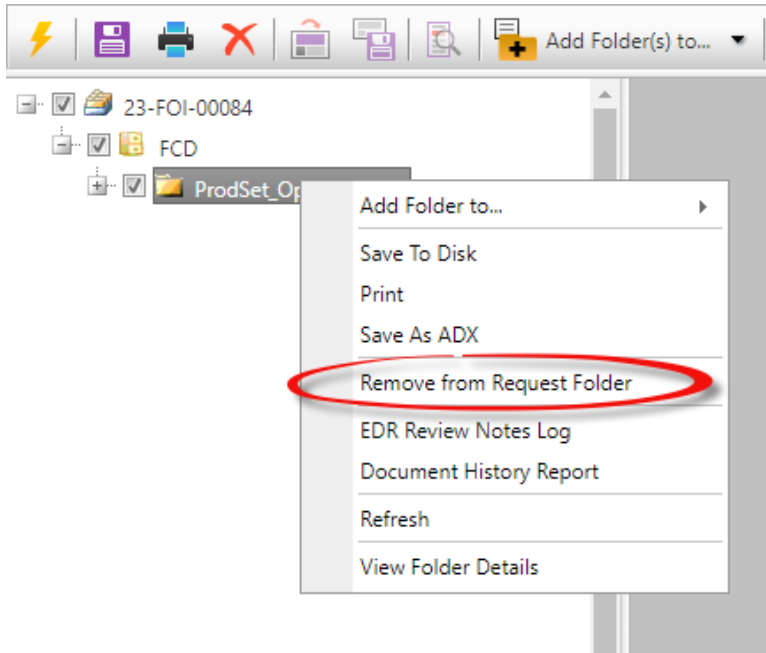
3.3 Remove Relativity Documents from the Request Folder

Documents added to a request from Relativity can also be removed from the request if needed. This must be done via the DM interface.

First, open the Request containing the documents you want to download. Next, navigate to the *Add/Search/View Documents* interface, then select the documents from the *Request Folder Documents* workspace and click **Open Documents**. Document Management opens with the selected documents listed in the left-hand navigation.

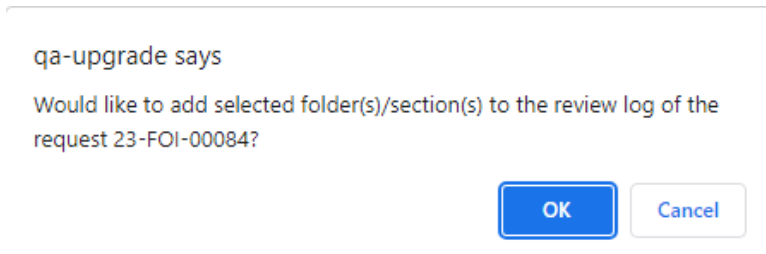
Right click the **Folder** of the production set you'd like to remove, then select **Remove from Request Folder**:





A confirmation message appears. Click **OK** to remove the documents or **Cancel** to cancel the action.

After clicking **OK**, a second confirmation message appears asking “Would [you] like to add selected folder(s)/section(s) to the review log of the request?” To remove the documents completely, click **Cancel**. Otherwise, click **OK** to move the documents to the Review Log.



3.4 Deliver Documents from Relativity

Using the AX-Relativity integration, you’ll be able to deliver Relativity documents to both individual Requesters and to PAL. The steps and methods for document delivery are the same as standard Document Management delivery, and the unique delivery processing required for Relativity documents occurs in the background.

See the *ATIPXpress User and Administrator Manual* for details on the standard delivery process for Requesters and PAL.



4 Troubleshooting

The Relativity integration requires that all redaction codes used in Relativity are duplicated in ATIPXpress. If you attempt to import a Relativity production set that includes codes that are not present in AX, the system will throw an error. This message will highlight the code that is missing from ATIPXpress.

If you encounter this issue when working with the Relativity integration, please contact your ATIPXpress administrator and include the code highlighted in the error message. Your administrator can then add the missing code via ATIPXpress administration, which will allow the documents to successfully import from Relativity.

