

ATIPXpress

Relativity Integration

v11.8.0

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ATIPXpress v11.8.0 Relativity Integration

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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/OAuth_2_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.

