ATIPXpress

Using Relativity with ATIPXpress



ATIPXpress v11.8.0 Using Relativity with ATIPXpress

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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.

ATIPXpress + • • • •

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	Review Log Documents 🗓					
Assign Users	Add Documents Add Documents From DM Add From Correspondence Log Refresh					
Correspondence	File Cabinet GUID Document Created Date Date Added Sections Pages Redacted? Recent Layer Modified By					
	There are no review logs to display					
Request for Documents (0/0)	Image size: 20 0 items in 1 pages					
Add/Search/View Documents (0/1)	Open Documents Open All Documents					
Fees/Billing	Note: To remove documents from the Review Log you must select and Open the document(s) in Document Management.					
Final Actions	Request Folder Documents					
Deliver Documents	Add Documents Add Documents From DI Add Documents From Relativity Dadd From Correspondence Log Refresh					
Stop the Clock	File Cabinet GUID Document Created Date Date Added Sections Pages Redacted? Delivery Status					
	FCD 0000000214 88mb 8/7/2023 0 1 No No Pages Deli					
Notes (0)	Here Page size: 20 • 1 items in 1 pages 1					
Task Reminders (0/0)	Open Documents Open All Documents					
Extensions (0/0)	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.

Prod	uction Sets					ā
Pro	duction Set Information	B				
	Production Set Name :	*				
	Production Set ID :					
	Workspace Name :					
	Workspace ID :					
	Added To Request :	No	-			
					Search	Clear Close
					0	
Add	To File Cabinet Drawer : Fo	CD (123)	•		View Production Set	Add To Request
	Sub Requests* : D	lefault	•		View Production Set	Add to Request
Prod	uction Sets Found					
	Production Set Name	Production Set ID	WorkSpace Name	WorkSpace ID	Created Date	Added To Request
	Sample Production	1036354	Relativity Starter Template	1015024	8/13/2010 4:07:	No
	ProdSet OpexusTest	1040062	Sample Workspace	1018203	7/5/2023 6:33:0	No
	JPEGTest	1040081	RushabhWorkspaceTest	1019085	7/23/2023 11:5	No
	ProdSetTest	1040072	RushabhWorkspaceTest	1019085	7/5/2023 4:10:3	No
	TiffTest	1040085	RushabhWorkspaceTest	1019085	7/24/2023 12:0	No
	TestJpeg	1040106	OPEXUSTest	1104622	7/26/2023 6:35:	No
	TestTif	1040102	OPEXUSTest	1104622	7/26/2023 6:34:	No
	file types	1040115	TestFiles	1125213	8/2/2023 7:19:0	No
	unstaged	1040111	Unstaged	1125980	8/8/2023 1:30:3	No
	mark up	1040101	codes	1144686	8/3/2023 9:38:3	No
	TestJpeg7thAug	1040122	Test7thAug	1209715	8/7/2023 4:21:0	No
	Testtiff7thAug	1040118	Test7thAug	1209715	8/7/2023 4:19:2	No
	<u>set</u>	1040121	Code Workspace	1213732	8/7/2023 10:31:	No 🗸
K	▲ 1 ► ► Page size 20					15 items in 1 pages
					View Production Set	t Add To Request

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 dropdown 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).

R	Request Folder Documents 💼									
	Add	Documents	Add Documents From	DM Add Documents From Re	elativity Ad	ld From Corres	pondence l	Log	Refresh	
		File Cabinet	GUID	Document	Created Date	Date Added	Sections	Pages	Redacted?	Delivery Status
		FCD	0000000214	88mb	8/7/2023	8/7/2023	0	1	No	No Pages Del
		FCD	0000000236	file types (5)	8/7/2023	8/7/2023	0	1	No	No Pages Del
	Z	FCD	0000000208	ProdSet_OpexusTest	8/3/2023	8/3/2023	0	1	No	No Pages Del
	Image: State Stat						tems in 1 pages			
							ent			

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**:

🗲 🖹 🖨 🗙 🚊	Add Folder(s) to 🔻
⊡ 🗹 🎒 23-FOI-00084 ⊡ 🕅 📴 FCD	
	Add Folder to Save To Disk Print Save As ADX Remove from Request Folder
	EDR Review Notes Log Document History Report Refresh View Folder Details

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.