FOIAXpress

Relativity Integration



FOIA Xpress v11.11.0 Relativity Integration

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1 Introduction

1.1 About Relativity Integration

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

1.2 Relativity Integration Prerequisites

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

- 1. If you are not on FOIAXpress version 11.3.0 or higher, upgrade the application first. Follow the steps in the FOIAXpress 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):

=	Relativity Connector Settings				x		
	Enable Relativity Connector						
	Relativity Site URL* :						
	Authentication Mode * : Bearer Token						
	ClientID * :						
	Client Secret * :						
		Save	Refresh	Close			
F	Remarque: * fields are mandatory.						

- 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

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	1	×] 🔺					
EDR - Jobs	No	1	×						
EDR Search Criteria	No	1	×						
Send/Save Documents for Consultation	No	1	×						
Add collaboration Documents to Request folder	No	1	×						
Save To Disk	No	1	×						
Document Delivery	No	1	×	-					
Relativity Import Production Sets Job									
Check All			Save Refresh Close	e					
Delete Scheduler Trace Files									
Relativity Import Production Sets Job									

3. Click Save to save your settings.

2.3 Configure Redaction Codes

All Relativity markup codes must also be present in FOIAXpress. If any Relativity codes are not also included in FX, attempting to import Relativity documents will throw an error. Follow the steps below to ensure that your FX 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 FOIAXpress Administration.
- 4. Log in to FOIAXpress, 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 FOIAXpress, 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.