Create Object Records after Field Parsing

V4.2

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1 Overview

This Relativity workspace script will take one or many document fixed length and long text fields which contain a delimited list of values and create unique records in a custom object. This version will support fields that contain Unicode characters.

1.1 Supported versions

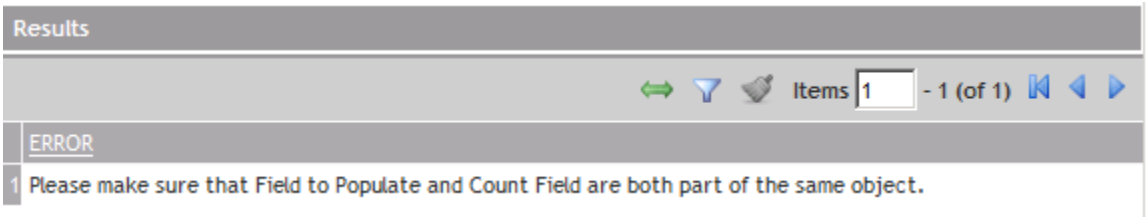
This script is supported in Relativity version 8.1 – 9.3.

1.2 Category

- This custom solution consists of the following components:
  - Relativity script that runs at workspace level

1.3 Special considerations

- The performance of the script depends on the size of the saved search and the count of values contained in the selected text fields. Please try to minimize the sizes of the saved searches.
- Ensure that the destination field has a length long enough to contain the individual items from the selected source fields or you may receive an error warning you about truncated data.
- If the user selects two different objects for the Field to Populate and the Count Field, the script will error out and show a message as follows:



- This script will create custom object records and cannot be undone.
- If you receive the error "**String or binary data would be truncated**", ensure that the length of the parsed values do not exceed the Length specified in the selected fixed-length text field.
- The field on the RDO that is populated when new records are created must support Unicode characters if you expect Unicode characters in your data. To enable Unicode, navigate to the properties of the field and make sure the Unicode field is set to Yes.
- The combination of all four input fields (Field 1 through 4) cannot exceed 4000 characters. This is a limitation imposed by database fields supporting Unicode.
- Performance Metrics: The script was executed against a Saved Search which contained 100,000 documents with 1.3 million unique email address spread across 4 email fields and completed in 7 minutes.

2 Deployment

Follow the steps below to deploy the script to your instance of Relativity.

To add a script to the Relativity Script Library:

1. Log in to Relativity.
2. Go to the **Admin** section.
3. Click on the **Relativity Script Library** tab.
4. Click on the **New Relativity Script** button.
5. Clear the contents of the new script window.
6. Copy the contents of the file **Create Object Records after Field Parsing.krs** and paste them into the new script window.
7. Click **Save**.

To add the script to a workspace:

1. Navigate to your case.
2. Click on the **Scripts** tab.
3. Click on the **New Relativity Script** button.
4. Select the radio button **Select from Script Library**.
5. Click on the **Ellipsis (…)** button.
6. Select the script **Create Object Records after Field Parsing**.
7. Click **OK**.
8. Click **Save**.

3 Input and preparation

3.1 To setup the workspace

9. Create a custom object type to hold the values which will be parsed from the delimited string.
    a. Go to the **Administration** > **Object Type** tab.
    b. Click the **New Object Type** button.
    c. Provide a name.
    d. Click **Save**.
10. Create a new field on the new custom object that will serve as the Field to Populate.
    a. Go to the **Administration** > **Fields** tab.
    b. Click the **New Field** button.
        i. **Object Type**: the newly created custom object type.
        ii. **Name**: provide a name.
        iii. **Field Type**: Multiple Object
        iv. **Associative Object Type**: Document
    c. Click **Save and New**.

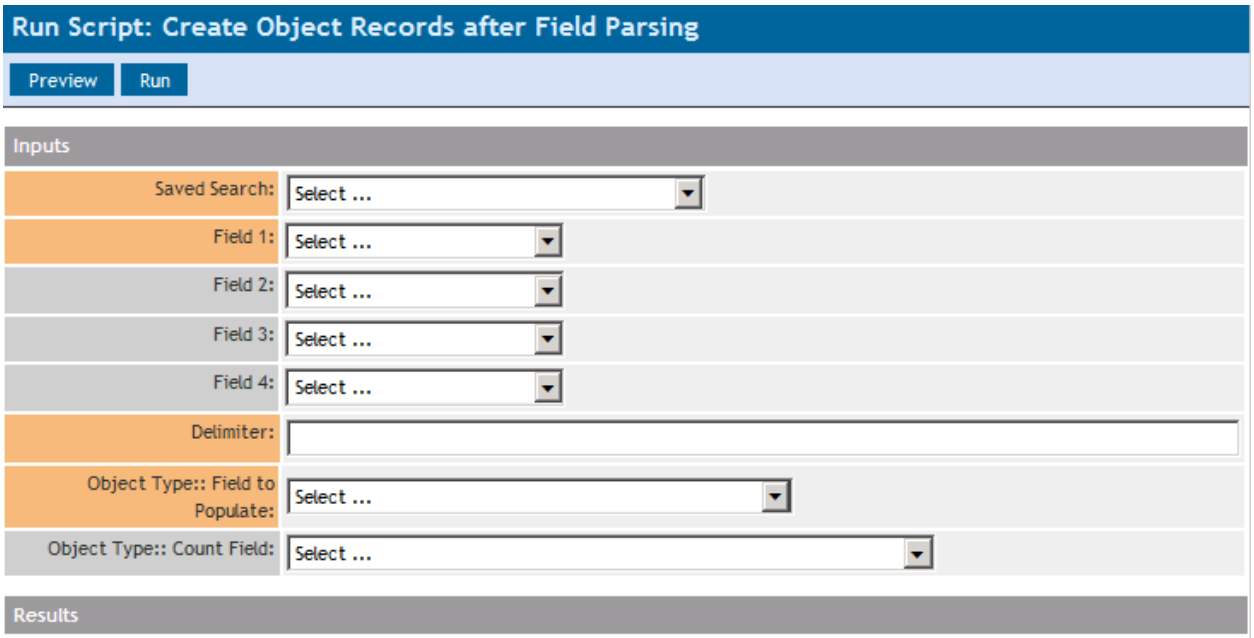
11. Create another field on the new custom object as the Count field.
    a. Go to the **Administration** > **Fields** tab.
    b. Click the **New Field** button.
        i. **Object Type**: the newly created custom object type.
        ii. **Name**: provide a name.
        iii. **Field Type**: Whole Number
    c. Click **Save**.

3.2 To input the script

12. **Saved Search**
    a. Required
    b. The saved search which contains the documents you would like to parse values from.
13. **Field 1**
    a. Required
    b. A fixed-length or long text field which contains a delimited list of values.
14. **Field 2**
    a. Optional
    b. A fixed-length or long text field which contains a delimited list of values.
15. **Field 3**
    a. Optional
    b. A fixed-length or long text field which contains a delimited list of values.
16. **Field 4**
    a. Optional
    b. A fixed-length or long text field which contains a delimited list of values.
17. **Delimiter**
    a. Required
    b. The character which identifies the separation between values in a list.
18. **Object Type:: Field to Populate**
    a. Required
    b. The custom object and field you wish to populate with the values parsed out from fields 1-4.
19. **Object Type:: Count Field**
    a. Optional
    b. Whole Number field

c. The custom object and field you wish to populate with the number of documents associated with each parsed out record from fields 1-4.

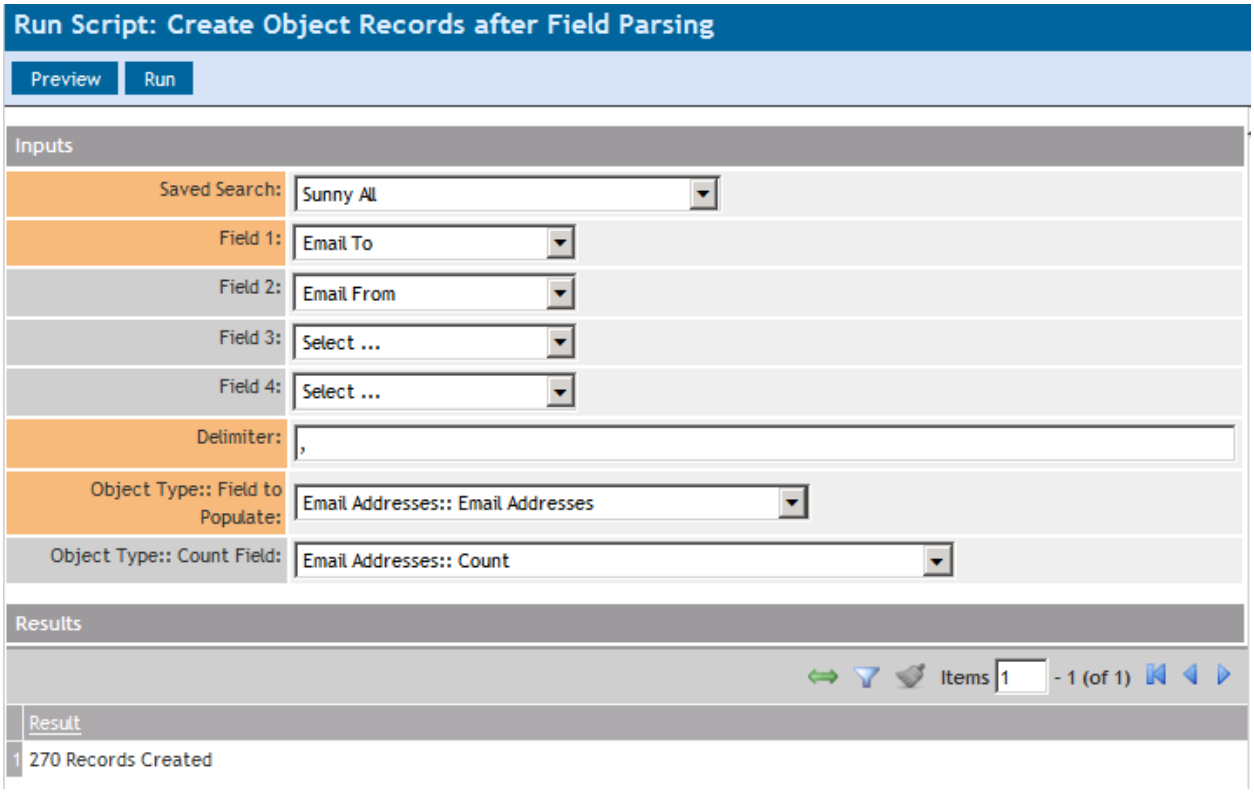
Inputs to script



4 Results of running

When the script is complete, it will display the number of records created.

Screenshot of results



5 Script Functionality

- When the script is executed, it will go through each document included in the selected saved search.
- For each document, each of the selected field values will be split based on the delimiter value.
- For each value which is split from the 4 field values, any unique value which does not already exist in the selected object type will be created. Any values that already exist in the selected object type will be left untouched.
    - The selected Field to Populate will be populated with the unique split values.
    - The multiple object field which relates the object type to a document will be populated with the document which the field value is parsed from. This is for newly created records in the custom object, as well as records that previously existed.
    - The whole number field is populated with the number of documents associated to each record. This is for newly created records in the custom object, as well as records that previously existed.
    - Leading and trailing spaces, carriage returns, line feeds, and tabs will be removed from the split values.

5.1 Example

- The following documents are included in a saved search called Email Documents.
- The Email From and Email To fields contain the email addresses we want to parse out into an object called Email Address.

				Control Number	Email From	Email To
1	☐	Edit		AS000001	asieja@kcura.com	tschurz@kcura.com
2	☐	Edit		AS000002	asieja@kcura.com	
3	☐	Edit		AS000003	asieja@kcura.com	
4	☐	Edit		AS000004	asieja@kcura.com	
5	☐	Edit		EN446502		robert.benson@enron.com, serena.bishop@enron.com, stephane.brodeur@enron.com, timothy.coffing@enron.com, m..driscoll@enron.com, frank.ermis@enron.com, mark.fischer@enron.com, mark.guzman@enron.com, chris.mallory@enron.com, ryan.slinger@enron.com, paul.thomas@enron.com, d..thomas@enron.com
6	☐	Edit		EN446503		ryan.slinger@enron.com

- When the script is run, the following results are displayed:
- In the Email Address object, the following rows are created and the Name field is set to the email address we parsed out from the Email From and Email To fields.

			Email Addresses	Parsed Email Addresses	Count
1	☐	Edit	"a..allen@enron.com	EN446582	1
2	☐	Edit	"chris.mallory@enron.com	EN446585	1
3	☐	Edit	"james.bruce@enron.com	EN446571	1
4	☐	Edit	"john.anderson@enron.com	EN446599 EN446601 EN446602	3
5	☐	Edit	"robert.benson@enron.com	EN446502	1
6	☐	Edit	9099632747@airmessage.net	EN446618	1
7	☐	Edit	ajay.sindwani@enron.com	EN446582	1
8	☐	Edit	ajit.dhansinghani@enron.com	EN446582	1
9	☐	Edit	alan.chen@enron.com	EN446582	1
10	☐	Edit	alan.comnes@enron.com	EN446546 EN446582	2
11	☐	Edit	albert.meyers@enron.com	EN446582 EN446585	2
12	☐	Edit	alison_heer@ddouglas.k12.or.us	EN446611	1
13	☐	Edit	amy.fitzpatrick@enron.com	EN446586	1
14	☐	Edit	andrea.dahlke@enron.com	EN446582	1
15	☐	Edit	andrea.woodland@enron.com	EN446585	1
16	☐	Edit	andrew.champion@enron.com	EN446582	1
17	☐	Edit	andrew.hawthorn@enron.com	EN446582	1
18	☐	Edit	andy.chen@enron.com	EN446571	1
19	☐	Edit	angela.davis@enron.com	EN446582	1

6 Support

For additional assistance, contact kCura Client Services at support@kcura.com.

7 Disclaimer

This script is intended for use only in the Relativity versions specified in this document and run under the guidelines presented. While each solution is carefully built and thoroughly tested to work on the versions of Relativity specified in this document, this script is not a core feature of Relativity and is not eligible for the same level of support as the Relativity platform.

In addition, custom components may not exhibit the same performance and behavior as native Relativity features. Custom solutions do not specify permission settings unless explicitly requested by the client.

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