

Name normalization setup basics

This quick reference guide contains a basic workflow for setting up name normalization. For more detailed information, see the Analytics section of the documentation site.

Name normalization setup

The setup for running name normalization has three parts:

1. Saved search
2. Analytics profile
3. Structured analytics set

1. Saved search setup

Use the following conditions and fields to create the saved search used for name normalization. You do not need to set a sort order on this search.

Search Name

There is no recommendation for the saved search name. Follow your team's normal protocol for naming searches.

Conditions

- From is set*
- Parent Document ID is not set**
- Include Families

*You can use any condition here which means "document is an email". Other common choices are based on the Relativity Native File Type or file extension.

**Generally, the Parent ID field is empty for parent emails. However, there may be situations where it is populated with its own control number. In that case, you may omit this condition and name normalization will ignore emails that are attachments.

Fields

Any fields are acceptable. As a QC step, we recommend including the fields that will be mapped on the analytics profile as there may be fields that are named similarly that could lead to errors.

- Email From
- Email To
- Email CC
- Email BCC

Note: Name Normalization also looks through the body of the email, but it's not necessary to expose the extracted text field as one of the fields on the saved search.

2. Analytics profile setup

The analytics profile is where you map the fields containing input information for name normalization. Note that while you can use the same profile that you use for email threading, name normalization only considers the Email From, Email To, Email CC, and Email BCC fields from the Analytics Profile.

Map the fields as follows:

| Profile field name | Mapped document object field |
|--------------------------|------------------------------|
| Email from field | Email From |
| Email to field | Email To |
| Email cc field | Email CC |
| Email bcc field | Email BCC |
| Email subject field | Email Subject |
| Email date sent field | Email Date/Time Sent |
| Parent document ID field | Parent Document ID |
| Attachment name field | File Name |
| Conversation ID field | (Do not map) |

3. Structured analytics set

Here are the steps and choices for creating a structured analytics set. For more information on these settings, see [Running structured analytics on the documentation site](#).

Structured Analytics Set Information

- **Name**—enter a name for the structured analytics set.
- **Prefix**—keep the default prefix or add your own prefix. Shorter prefixes, even just two characters, such as “E1,” take up less space in your views.
- **Operations to run**—select **Name normalization**.
- **Data source**—select the saved search you created above.

The screenshot shows the 'Structured Analytics Set Information' configuration window. It includes the following fields and options:

- Name ***: A text input field containing 'Set Name'.
- Prefix ***: A text input field containing 'SAS24'.
- Operations to run ***: A list of checkboxes:
 - Email threading
 - Name normalization
 - Textual near duplicate identification
 - Language identification
 - Repeated content identification
- Data source ***: A button labeled 'Select'.

Name normalization fields

- **Analytics profile**—select the profile you created above.
- **Analyze topmost email only**—set this to **Enabled**.
- **Use email header fields**—set this to **Enabled**.

- **Languages**—select any language used in email headers in your extracted text. We recommend that you always include English, even for data sets in other languages.
- **Apply Exclusion List**—for basic workflows, leave this **Disabled**.

Email Headers [?](#)

Analytics profile * Choose... ▾ [Add](#)

Analyze topmost email only

Use email header fields

Languages *

| | | |
|---|-----------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> English | <input type="checkbox"/> French | <input type="checkbox"/> Korean |
| <input type="checkbox"/> Chinese | <input type="checkbox"/> German | <input type="checkbox"/> Portuguese |
| <input type="checkbox"/> Dutch | <input type="checkbox"/> Japanese | <input type="checkbox"/> Spanish |

Apply Exclusion List

Optional Settings

- **Enable additional domain filtering**—set this to **Enabled**. This gives you more options for how to sort and filter domain names extracted from the email fields.
- **Try new name normalization (beta) logic**—for basic workflows, leave this **Disabled**.

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