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:

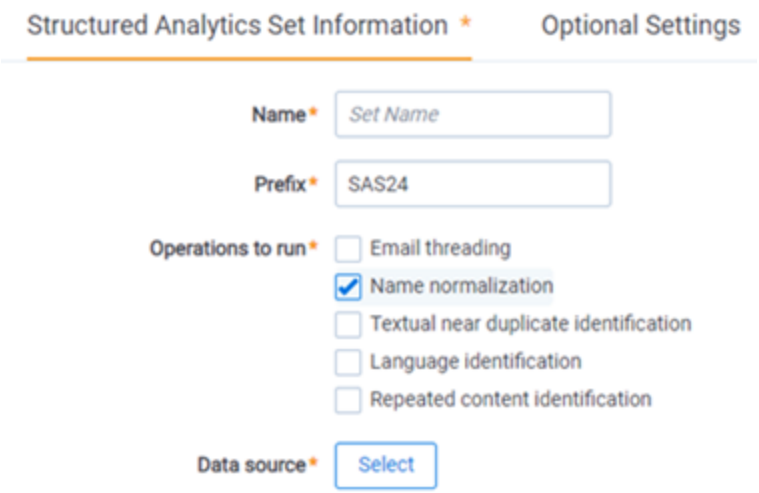
Profile field name	Mapped document object field
Email from field	Email From
Email to field	Email To
Email cc field	Email CC
Email bcc field	Email BCC
Email subject field	Email Subject
Email date sent field	Email Date/Time Sent
Parent document ID field	Parent Document ID
Attachment name field	File Name
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.

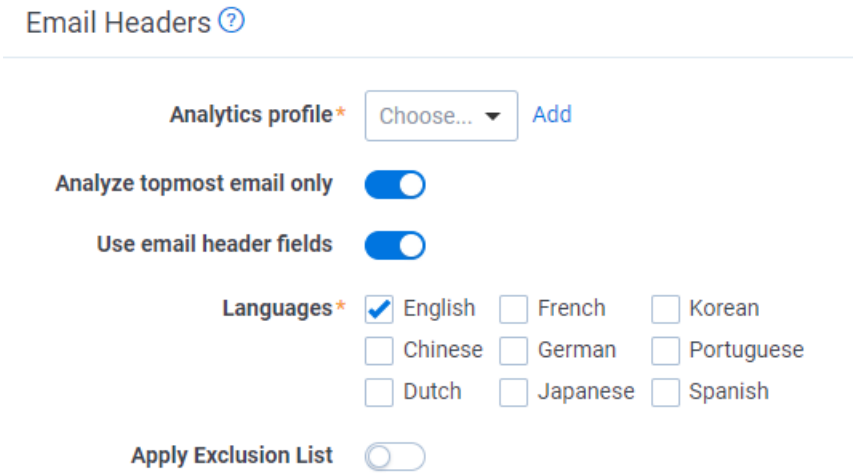


Name normalization fields

- **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**.



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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