



## Sorting Documents and Keeping Email Families Together

---

### Introduction

Oftentimes, you'll want to sort your document collection by date; however, it is difficult to keep emails and their attachments together because family items can have different dates or date values in different fields. To sort documents chronologically and keep email families together, you need a date field that is consistent for emails and their attachments.

### Recipe Overview

This recipe will show you how to create an additional date field and populate it with the sent date from the email to the attachments using a script. This will create a consistent date field for emails and their attachments, which will make the sorting process easier.

### Requirements

- Applicable to all versions of Relativity
- Relational field identifying email families
- Relativity security access
  - **Field:** Edit/Add
  - **Document:** Edit
  - **Permissions:** Access to **Scripts** tab
  - **Groups:** System Admin and Script Admin (if script has not been added to the workspace)

### Directions

1. Create a **Date** field to hold the date information. This field could be named **Parent Date**, **Family Date**, etc.
2. Create a **Yes/No** field to flag documents that have been affected by the script. If you add additional data to the workspace at a later date and need to run the script again, this flag will allow the script to run only on the newly added documents. This field can be called **Date Propagated**.
3. Run the **Propagate Sent Date to Family Documents** script. If you do not see this script listed under the **Scripts** tab, add it to the workspace from the **Relativity Script Library**. Once you run this script, you will be presented with the following inputs:
  - a. **Date Field – Original:** Enter the field from which you want the date propagated, such as **Sent Date**.
  - b. **Date Field – Sort:** Enter the field to which you want the date propagated (the field you created in step 1).
  - c. **Family Identifier:** Enter the relational field that defines the email families.
  - d. **Date Propagated:** Enter the Yes/No field you created in step 2.
4. The script will take the date value from the field selected in step 3(a) from the email, and write it to the field selected in step 3(b) for the email and attachments. Once the script has finished running, you can use the field created in step 1 to sort your documents and keep email family groups together.



## Sorting Documents and Keeping Email Families Together

---

### References

- Relativity – Admin Manual
- Relativity Case Script – Propagate Sent Date to Family Documents

### Tags

- Script
- Sort