# Building Custom Objects

v7.3

November 29, 2011

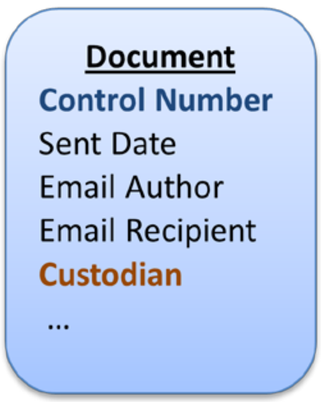
# Contents

# 1. Overview

Objects are securable and customizable within your workspace. Each Relativity workspace already contains system objects such as Document, OCR objects.

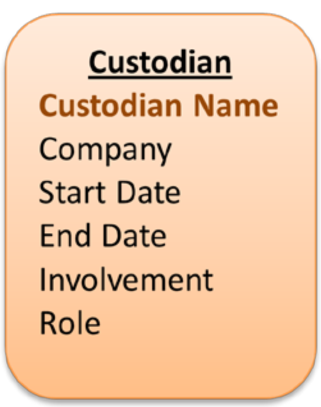
The Document object allows you to create fields which store objective or subjective information about the document.

You can create other objects outside of the document object to store data and link to other objects. Without Objects, a document might have a custodian field that stores the name of the custodian.



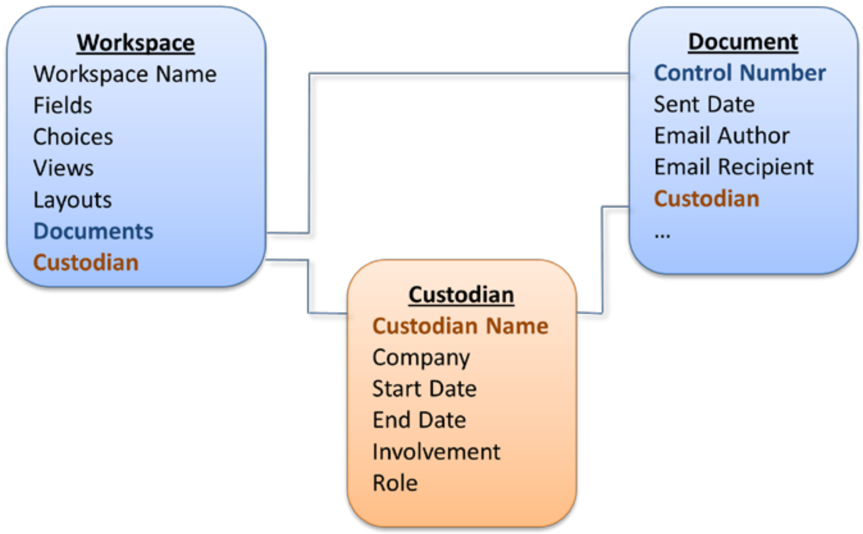

Document Properties

But what if you want to store information about the Custodian? Using Relativity Objects, you can create a Custodian object. This object can then store information about the custodian – their name, their role, their start date, etc.




Custodian Properties

You can then connect that Custodian object to the Document object.




Workspace –Custodian—Document Connection

This guide provides you with comprehensive instructions, allowing you to create and utilize the following Objects.

- Custodians
- Questions

# 2. Creating a Custodian Object

While custodians exist within every document, the current custodian field only houses the name of each individual. Custodian Objects represent structured data related to the individuals themselves, housing anything from their contact information, length of employment, etc.

## 2.1 Scenario

Your firm is representing a company in the middle of a lawsuit. The review process is going to be centered around specific custodians who meet certain criteria. In order for your review team to conduct an effective document audit, they must have detailed background information related to workspace custodians; specifically, each custodians' role within the company, as well as their hire date.

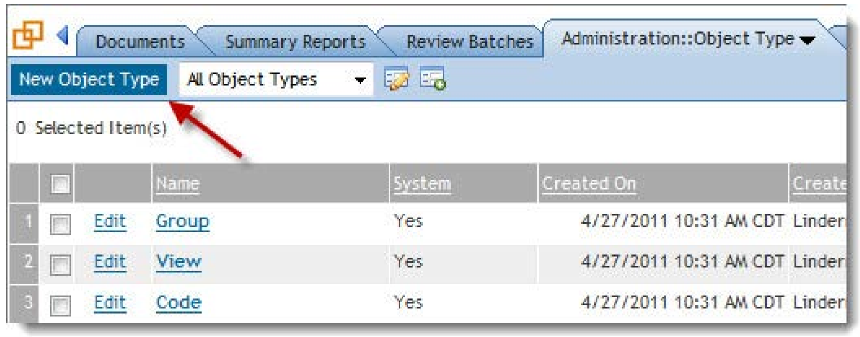
## 2.2 Creating a Custodian Object

First create a new Custodian custom object to house the required information. This new document object creates a field to take the place of your original document object "Custodian" field.

**→ Exercise: Creating a Custodian Object**

1. Select the **Object Type** tab.

2. Click the **New Object** button.

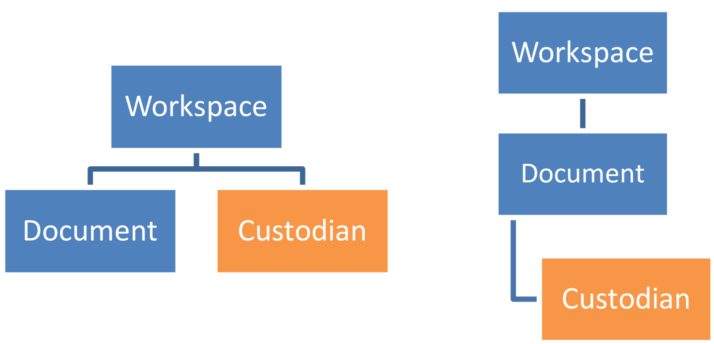



New Object Type

3. In the Name *<type*: **Custodian**>.

4. In the Parent Object Type, select **Workspace.**

The Custodian and Document objects are under the Workspace object. If you make Custodian a child of the Document object you won't have the ability to link with multiple documents.




Correct Incorrect

Object Parent Diagram

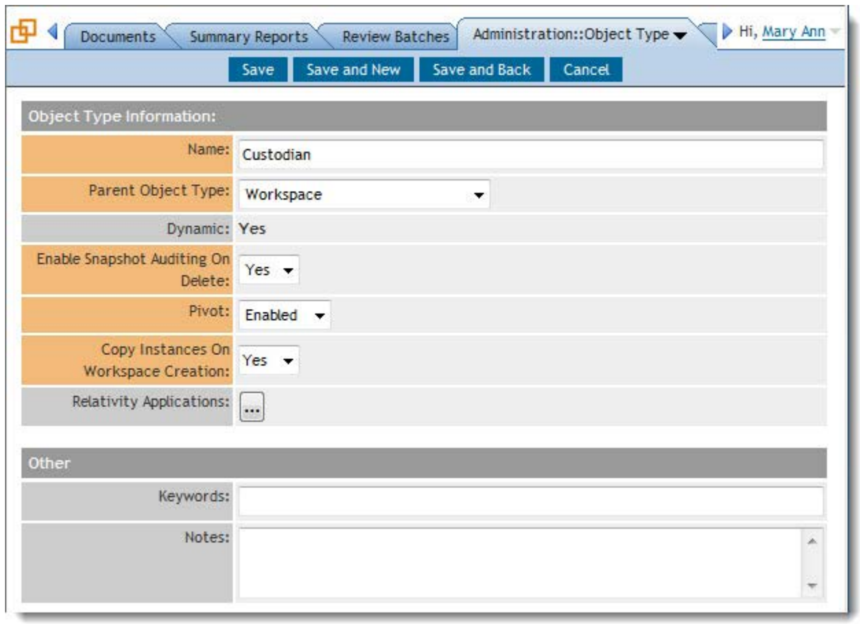
5. In the Enable Snapshot Auditing On Delete drop down, select **Yes**.

6. In the Pivot drop-down, select **Enabled**.

7. In the Copy Instance On Workspace Creation drop-down, select **Yes**.

If it is set to Yes when deleting items from the object, Relativity captures a snapshot of the item's current field values. This increases the size of the delete audit for the record, but may be useful when querying the workspace history.

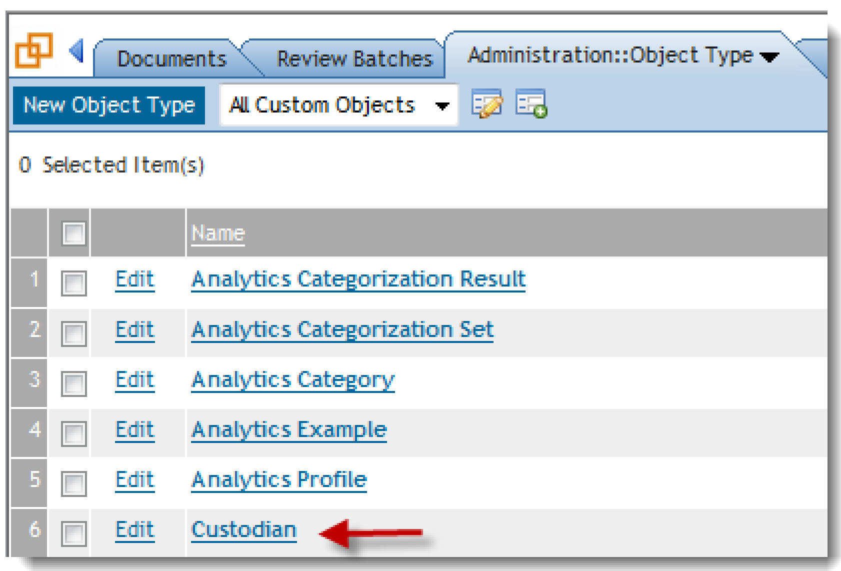
If this is set to No when deleting items from the object, Relativity deletes the item without capturing its field values.




Object Type Form

8. Click **Save and Back**.

9. The Object Type named Custodian appears in the Object list.




Object List

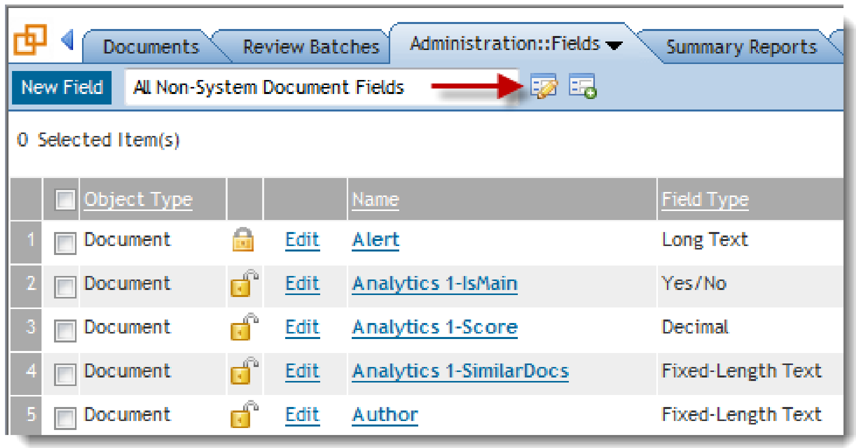
**Exercise completed**

## 2.3 Editing Items to Include Objects

When a new object is created the system automatically creates an associated field layout and view. Let's now examine these fields, layouts and views.

## → Exercise: Editing Field and Layout Views

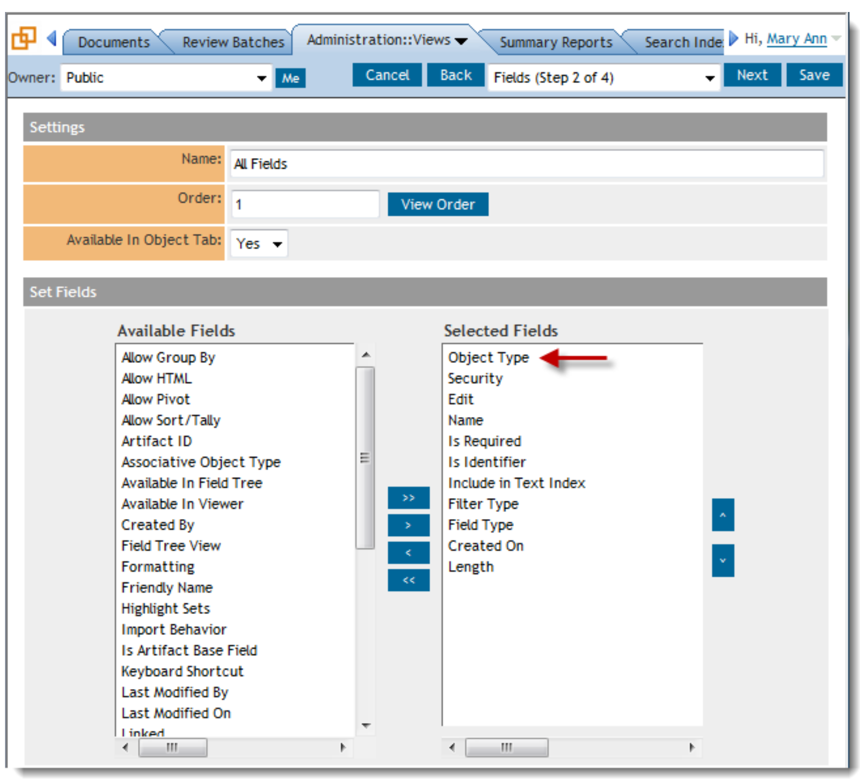
1. Select the Fields tab and click the **Edit View** button.




Edit View

The Basic Information form opens on Step 1.

2. Leave Name as **All Fields** to view all system fields that pertain to the Custodian Object.




Basic Information

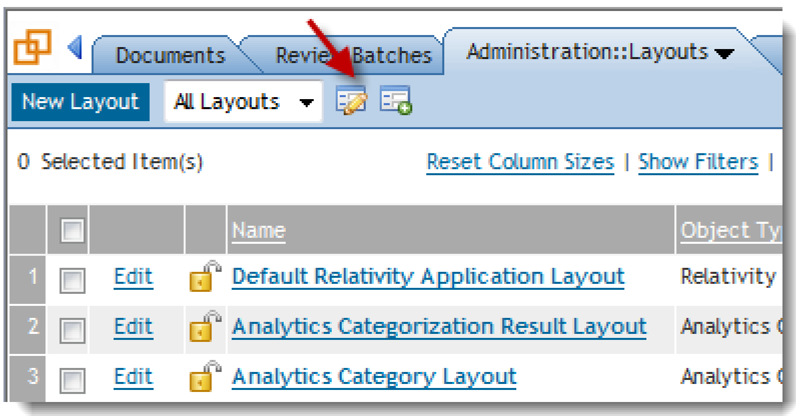
3. Select **Object Type** from Available Fields and move it to Selected Fields using the single blue arrow in the center. If you wish to adjust its position left to right in the view use the Up arrow on the right-hand side. Higher on list is farther left in the view.

4. Click **Save**.

5. Click on the **Show Filters** links. In the Object Type you are now able to filter and view on "Custodian".

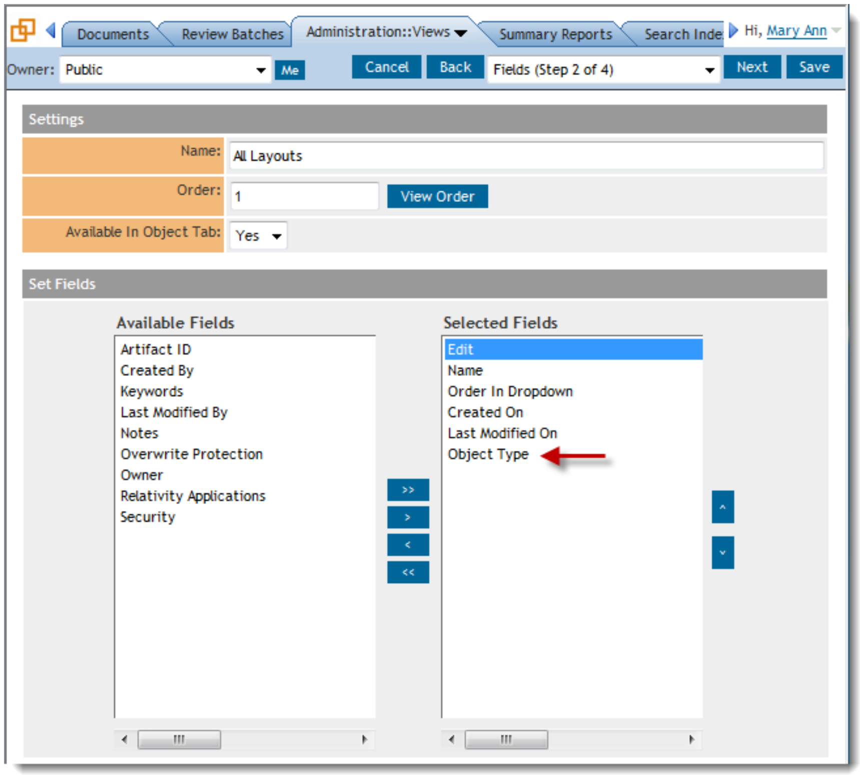
After editing your field view, you must do the same for your layout view.

6. Select the **Layouts** tab and click the **Edit View** button.




Edit View

7. Leave Name as **All Layouts** to view all system layouts that pertain to the Custodian object.




Basic Information

8. Select **Object Type** from list of fields on the left Available Fields column and move right to Selected Fields using the single **blue arrow** in the center. Adjust its position using the Up arrows on the right-hand side.

9. Click **Save**.

10. Click on the **Show Filters** link. In the Object Type, you are now able to filter and view on Custodian.

**Exercise completed**

## 2.4 Creating Custodian Fields

Now that the Custodian Object has been created, its corresponding fields to hold detailed custodian information must be created. As required, custodians' roles and hire dates will be added.

**→ Exercise: Creating Custodian-Related Fields**

1. Select the **Fields** tab. If you have custodian information already in your database  follow the steps below. If not then you can skip ahead to step 9 below.

We will edit the document object “Custodian” field. This is going to be exported and not used any longer for the custodian information so we will rename it to “CustodianOld”. Don’t delete it as we will export the current custodian data.

2. Find Custodian field from list and click **Edit**.

3. In the name field rename “Custodian” to “CustodianOld”

4. Click **Save and Back**.

5. Click **Show Filters**, filter on the Object type **Custodian**.

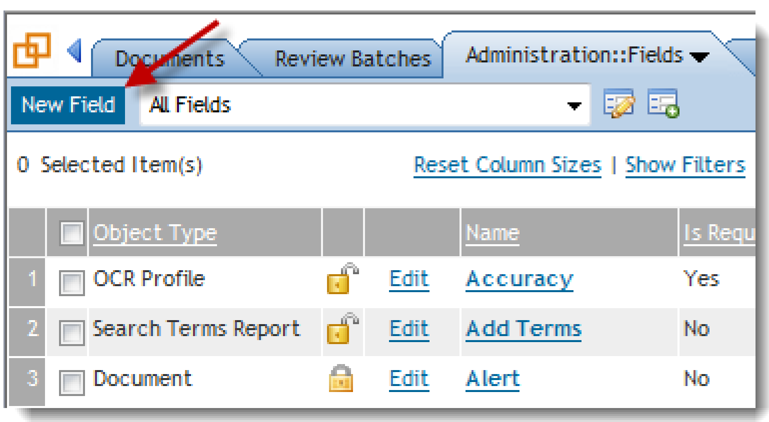
Notice the various fields automatically created when creating an object. The Name field is our new custodian field. We will create other custodian-related fields. The custodian object creates a field to hold custodian data but this is not yet connected to the document object. Since it is not connected to the document object you will not be able to see this on the documents view or import data to this field from the Desktop client. We will rename it to custodian to hold the name information.

6. Click **Edit** next to the Name field.

7. In the **Name** field change Name to Custodian.

8. Click **Save and Back**.

9. Click **New Field**.




New Field button

10. Create a fields related to Custodian roles as follows:

- Object Type: **Custodian**
- Name: **Company**
- Field Type: **Fixed-Length Text**

- Length: **255**
- Required: **Yes**
- Include in Text Index: **No**
- Linked: **No**
- Filter Type**: Textbox**
- Open to Associations: **Yes**

11. Click **Save and New**.

12. Create another field related to custodian Start Date as follows:

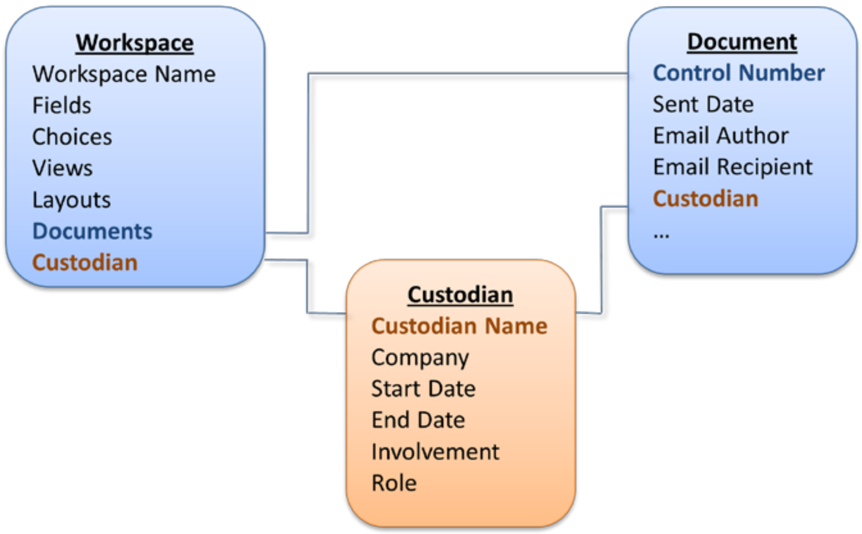
- Object Type: **Custodian**
- Name: **Start Date**
- Field Type: **Date**
- Required: **Yes**
- Formatting: **Date**
- Include in Text Index: **No**
- Linked: **No**
- Filter Type**: Textbox**

13. Click **Save**. Your custodian-related fields are created.

14. Create a field related to custodian roles as follows:

- "Object Type" drop-down: **Document**

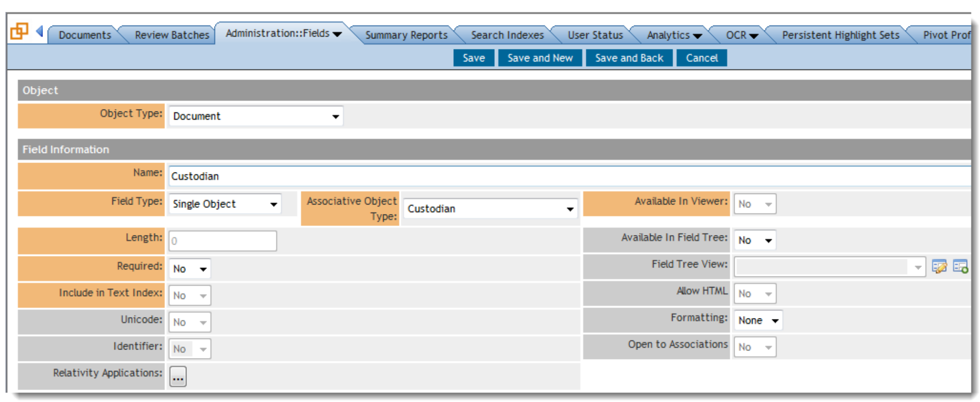
Creating this object connects the Custodian object to the Document Object. This is the only item with an Object type of Document. Custodian information can be added here or in the Custodian object named custodian renamed from name and created when the custodian object was created. In the field type for this example we will use the object field.  This allows for a one to many connection to the documents.  One custodian to many documents.  You cannot attach multiple custodians to one document using this field type.




Workspace—Custodian—Document Connection

- Name: **Custodian**
- Field Type: **Single Object**
- Object Type: **Custodian**
- Required: **Yes**
- Include in Text Index: **No**
- Linked: **Yes**

15. Click **Save and New**.




Custodian Object Field

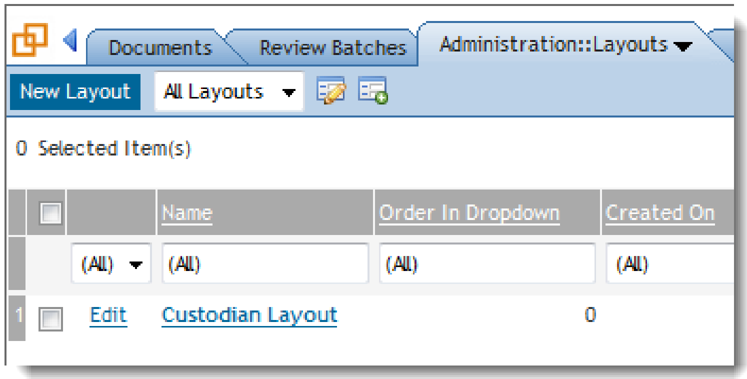
**Exercise completed**

### 2.4.1 Applying Custodian-Related Fields to a Layout

After creating custodian-related fields, you must apply them to your Custodians layout.

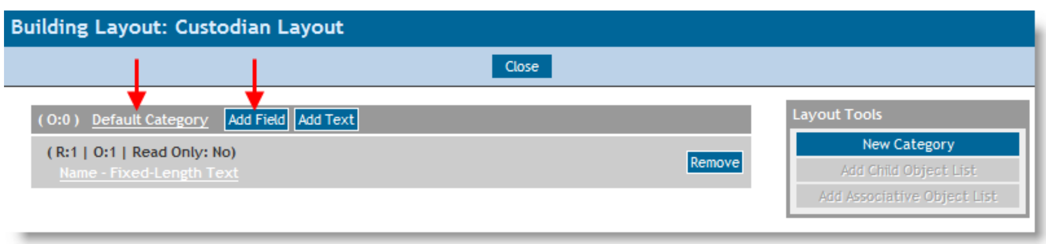
**→ Exercise: Applying Custodian-Related Fields to a Layout**

1. Select the **Layouts** tab and filter Object Type to Custodian
2. Click the **Custodian Layout** hyperlink. This layout was automatically created with your Custodian Object.




Custodian Layout hyperlink

3. Click on **Build Layout** to begin.
4. Click on **Default Category** and customize the Title field to **Custodian Information**.
5. Click **Save**.
6. The "Custodian" field which was originally named "Name" is added to the layout by default. Click the **Add Field** button.




Default Category and Add Field button

7. Add the role field as follows:

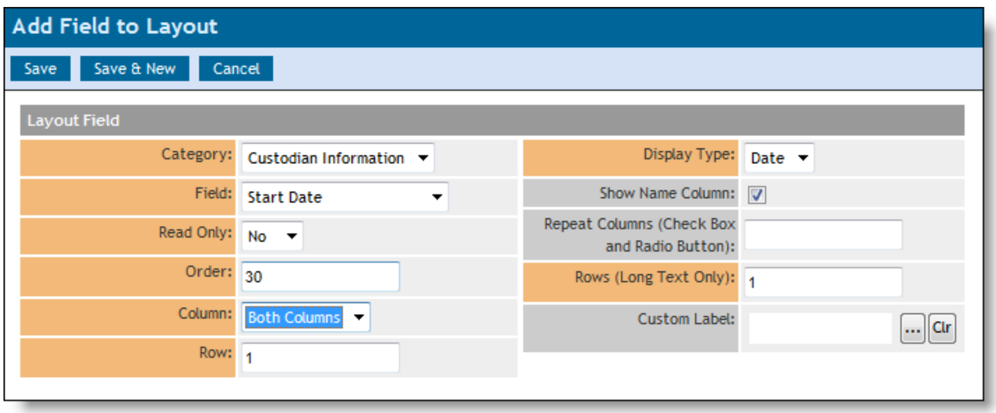
- Category: **Custodian Information**
- Field: **Company**
- Read-Only: **No**
- Order: **20**
- Column: **Both Columns**
- Row: **1**

- Display Type: **Text**

8. Click **Save and New**.

9. Add the hire date field as follows:

- Category: **Custodian Information**
- Fields: **Start Date**
- Read-Only: **No**
- Order: **30**
- Column: **Both Columns**
- Display Type: **Date**




Add Field to Layout dialog box

10. Click **Save**.

When you create a new object field you also get the option of adding the Associative Object list in your layout. This allows you to connect to another object. Since we are in the Custodian Object layout adding the Associative Object adds the Document object list.

11. Click on **Add Associative Object List.**

- Associative Object: **Document- Custodian**
- View: **Documents**
- Links Point to Popup: **No**
- Order: **10**

By selecting “Yes” in the “Links Point to Pop-up” drop-down, Relativity will open a dialog box beside the document view. By selecting “No”, Relativity will navigate away from the document and redirect the reviewer to another page.

12. Click **Save**. We are done with the custodian layout.

13. Click **Close**.

**Exercise completed**

# 3. Updating New Custodian Field

If you are using a workspace with custodian data already present follow the steps below to move that data to the new custodian field. If not, skip ahead to Section 4.2 to manually enter custodian information.

In order to use the new custodian object we need to populate the custodian information. When using an existing workspace, any existing custodian data must be exported out of the current document object custodian field. Then the exported data is loaded into the new custodian field in the document object. This field will replace the standard “CustodianOld” field.

## 3.1 Preliminary Steps

There are two scenarios that affect the way Custodian data is loaded:

- Data has already been loaded into your workspace (See Section 3.2)
- Data has not been loaded into your workspace (See Section 4.2)

Regardless of whether data has been loaded into your workspace, manual custodian entry is always available. See Section 4.2 for more details.

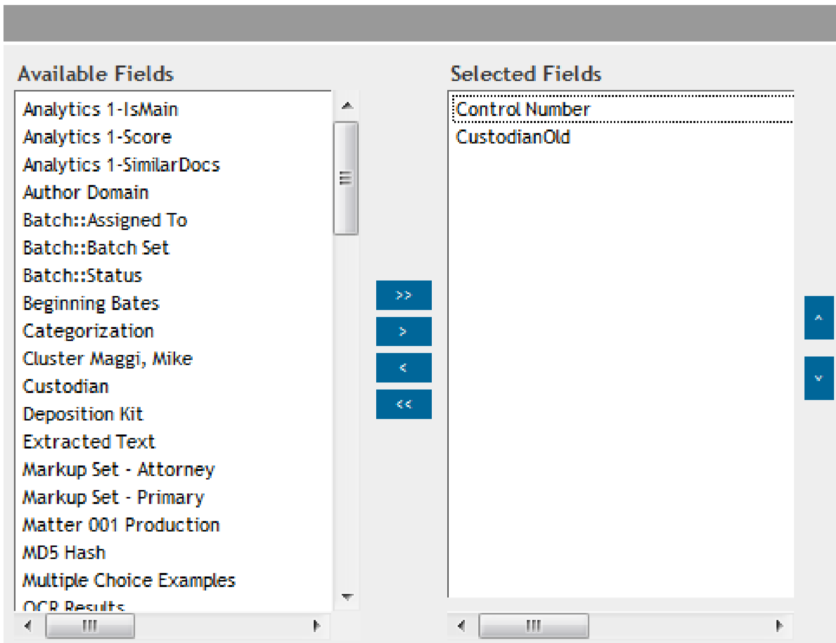
## 3.2 Exporting Custodian Data

If you are working on an existing workspace with existing Custodian information, you will want to transfer that information from its existing field to your object field. This is accomplished by exporting the old data and importing into the new field.

**→ Exercise: Exporting Custodian Data**

1. Set the Custodian field to occur in your document view:

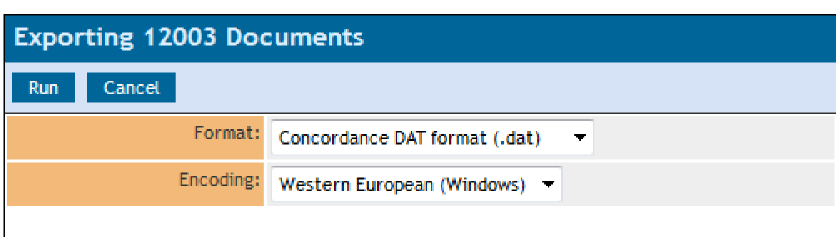
- In the document tab, click **Edit View** ( ) next to the dropdown.
- Click **Next** on the Enter Basic Information screen.
- With the arrows, shift **CustodianOld** from the Available Fields to the Selected Fields box on the right.
- Click **Done.** Note that the custodian name now occurs in the document view.




Select Fields Display

2. In Mass Operation bar select **All ###** then **Export to File.** Export all your custodian and control number data to an external file. Click **Go**.

While you can export all your fields in view and only load the custodian field the export will go faster with only the Control number and custodian fields in view.




Export to File

3. The Export dialog box appears. Set the Format drop-down to **Concordance DAT format (.dat)**, and the Encoding drop-down to **Western European (Windows)**.
4. Click **Run**. **Save** the .dat file to your local machine. In Section 4.1.1, this information will be re-imported.

**Exercise completed**

# 4. Applying Custodian Data

Once the new Custodian field has been created, corresponding data must be applied. As covered in Section 3.1, there are two scenarios that affect the way custodian data is loaded:

- Data has already been loaded into your workspace
- Data has not been loaded into your workspace

## 4.1 Importing Load Files

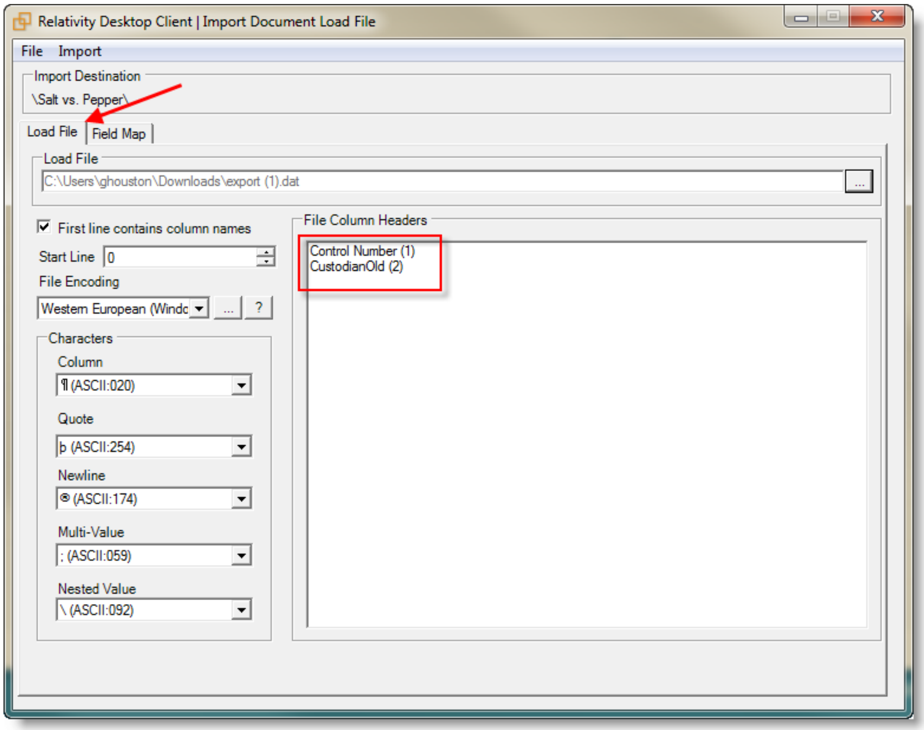
Refer to Section 4.1.1 if you previously exported custodian information to a .dat file. Continue to Section 4.1.2 if you have not exported data previously loaded data in your workspace.

### 4.1.1 Importing Custodian Data

If data is present in your workspace, the previously saved .dat file containing your custodian information will need to be imported.

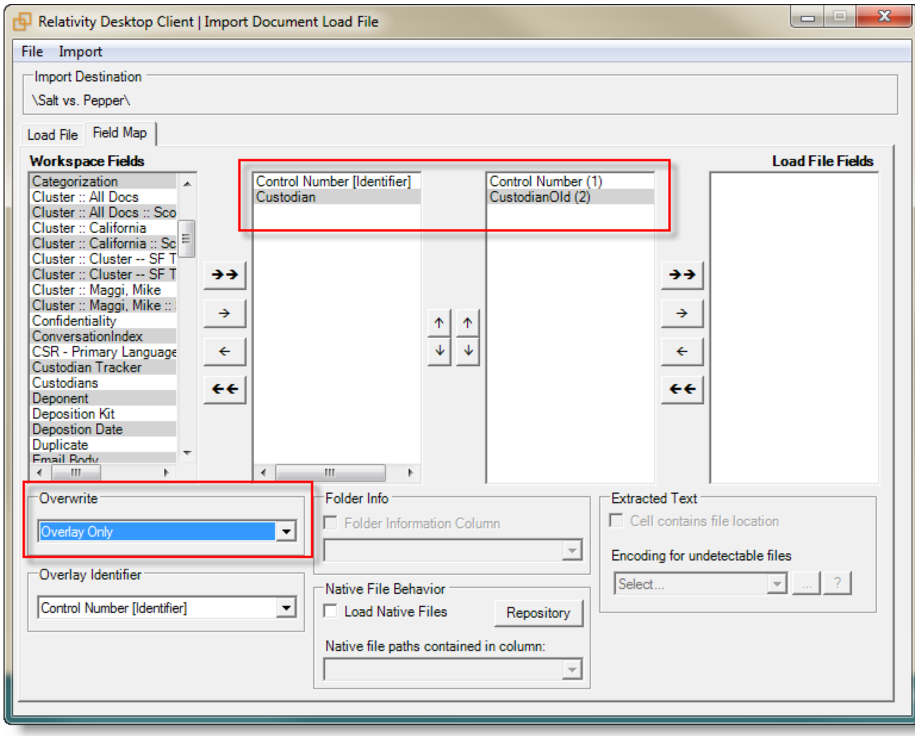
**→ Exercise: Importing Custodian Data**

1. Open the Relativity Desktop Client and browse to your workspace.
2. Select **Tools | Import |Document Load File**.
3. In the **Load File tab**, browse to and select the .dat file. Control Number and Custodian appear in the **File Column Headers** box.



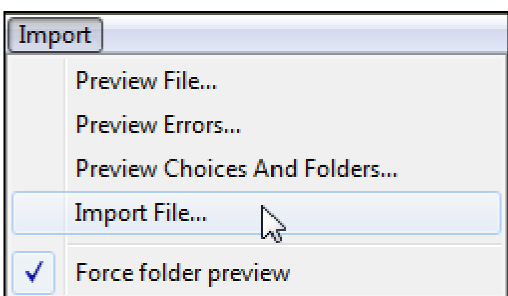

Load File tab

4. In the Field Map tab, select **Custodian** and **Control Number** from the Workspace Fields and **CustodianOld** and **Control Number** from the Load File Fields. Map in the center, adjust their positions by using the Up arrow buttons.
5. In the Overwrite dropdown, select **Overlay Only**.




Field Map tab

6. Select **Import | Import File**.
7. You can close out of the desktop client when this has completed.




Import File

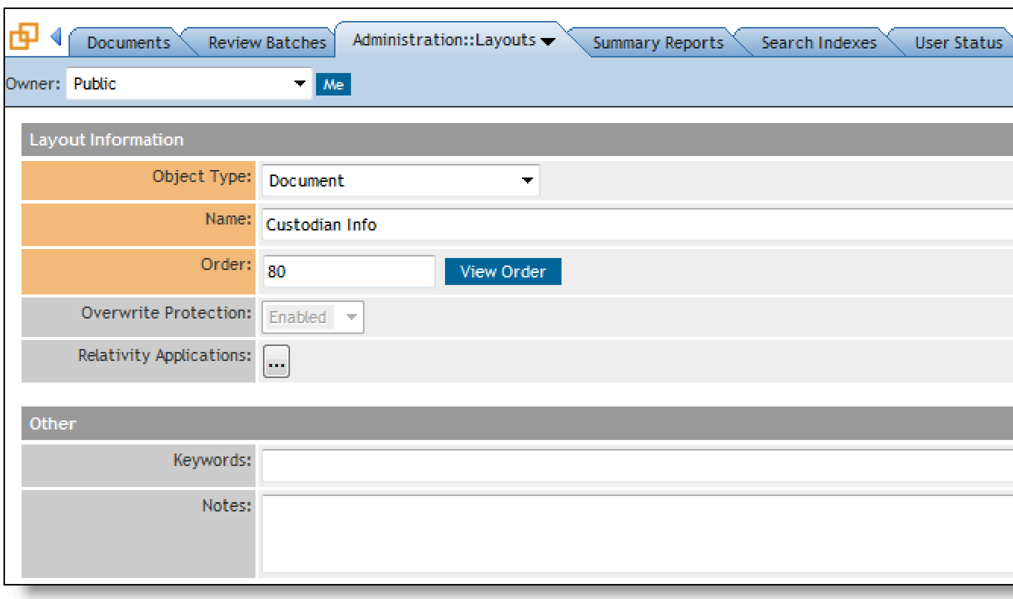
**Exercise completed**

## 4.2 Manual Custodian Entry

Regardless of whether data has been loaded into your workspace, manual custodian entry is always available. This exercise will guide you through adding a custodian manually and assigning them to documents. We need to add a layout to the document object with our custodian information. The previous layout we edited was for the custodian object.

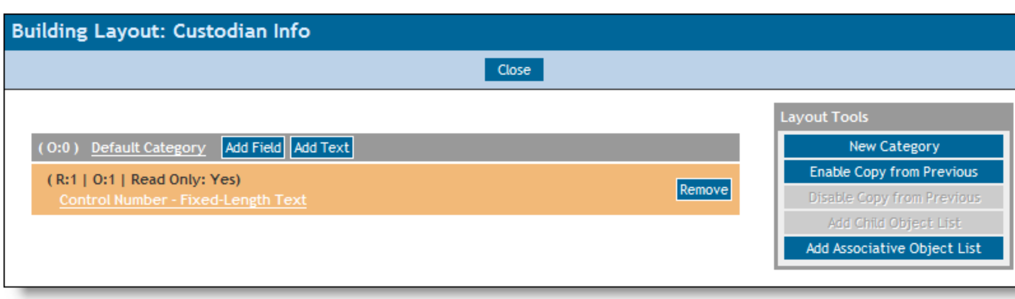
## Exercise: Creating a Custodian-Related Layout in the Document Object

1. Select the **Layouts** tab and click the **New Layout** button.
2. Create a layout using the following:
   - Object Type: **Document**
   - Name: **Custodian Info**
   - Order: **80**




Layout Information

3. Click **Save**. Click the **Add Field** button.

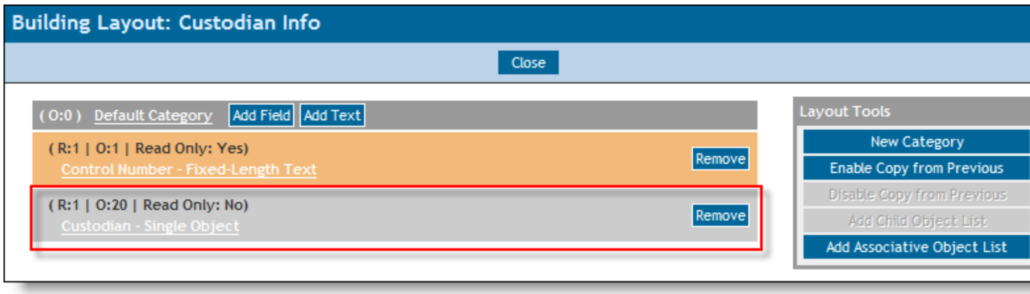



Add Field button

4. The Add Field to Layout Dialog box opens. Complete as follows:

- Field: **Custodian**
- Read-Only: **No**
- Leave other fields as default

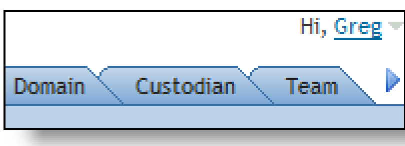
5. Click **Save**. The field appears in the layout.




Custodian field

## 4.3 Adding Custodian Information

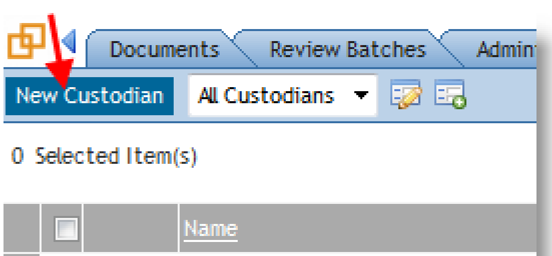
1. Select the **Custodian** tab.




Custodian Tab

2. Click the **New Custodian** button.

3. Fill in the information for a new custodian including custodian name, role and hire date. If you have imported the old custodian information, click on the Edit link to complete the new custodian object fields.




New Custodian manual entry

4. Click **Save**.

**Exercise completed**

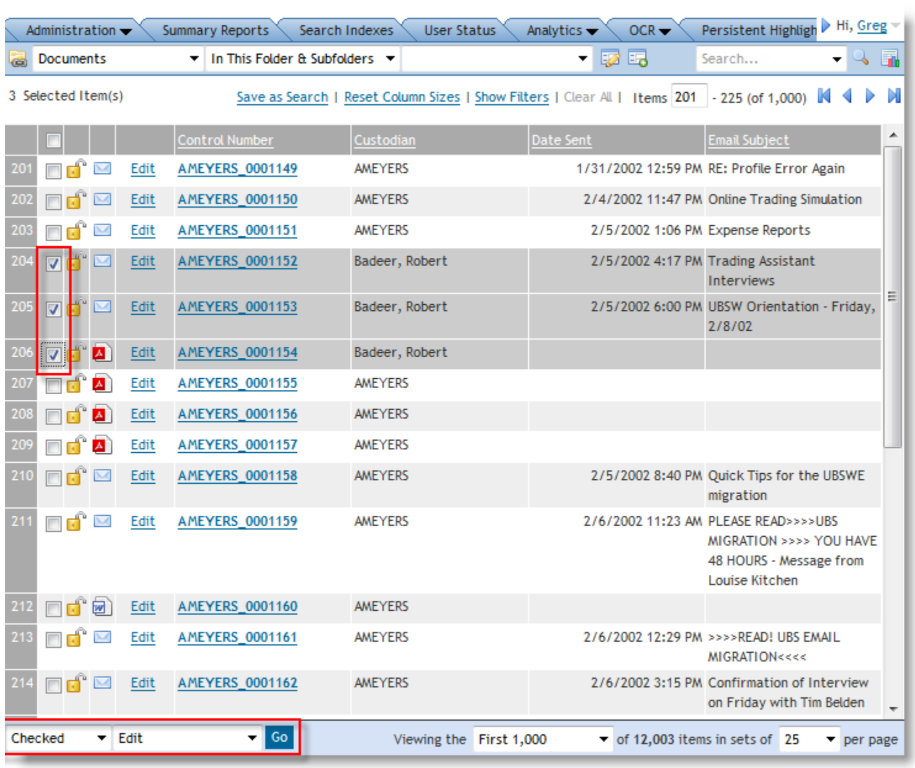
If you have manually added custodians to your workspace, you must associate them with their corresponding documents.

### 4.3.1 Associating Custodians and Documents

Once you have created your custodian-associated layout, you can manually associate custodians with specific documents. The imported custodian information already has custodians associated to documents.

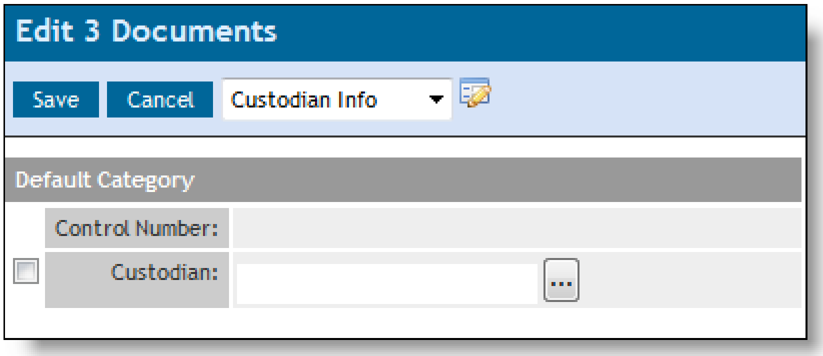
**→ Exercise: Associating Custodians and Documents**

1. Select the **Documents** tab and select the **checkboxes** of a few documents in the list.
2. In the Mass Operations bar, select **Checked** and **Edit**.



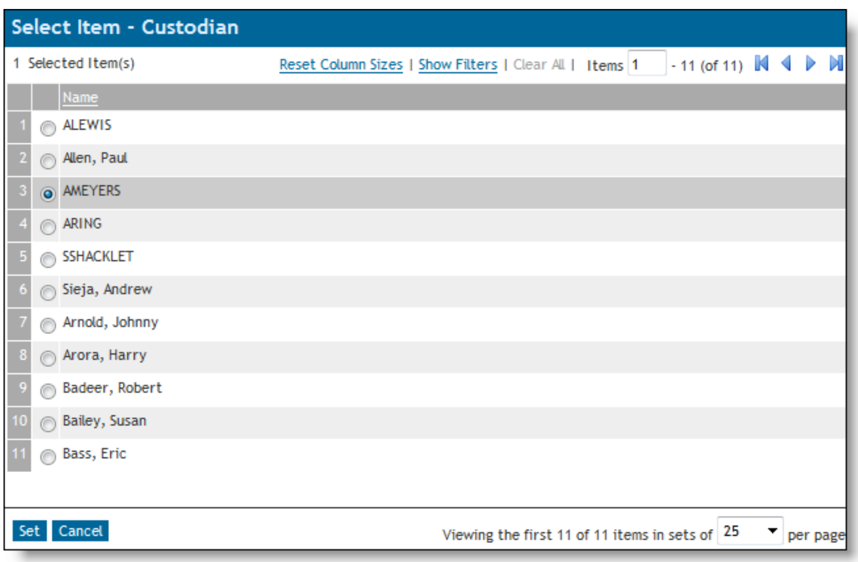
Mass Edit

3. Click **Go**. The Mass Operations dialog box appears.
4. Select **Custodian Info** layout in the drop-down and select the **Custodian Object checkbox**. Click the **ellipsis (...)** button.




Mass Operation dialog box

5. The Select an Item dialog box appears. Select the **radio button** next to a custodian's name.




Select an Item dialog box

6. Click **OK** and then **Save**. The custodian has been applied to the selected documents. To view the custodian's information within the document view, open a **document associated with your custodian**.

7. In the coding drop-down, select the **Custodian** layout. The hyperlinked custodian appears in the view.

8. Click the **hyperlinked custodian**. The editable information and documents associated to this custodian appear in the view.

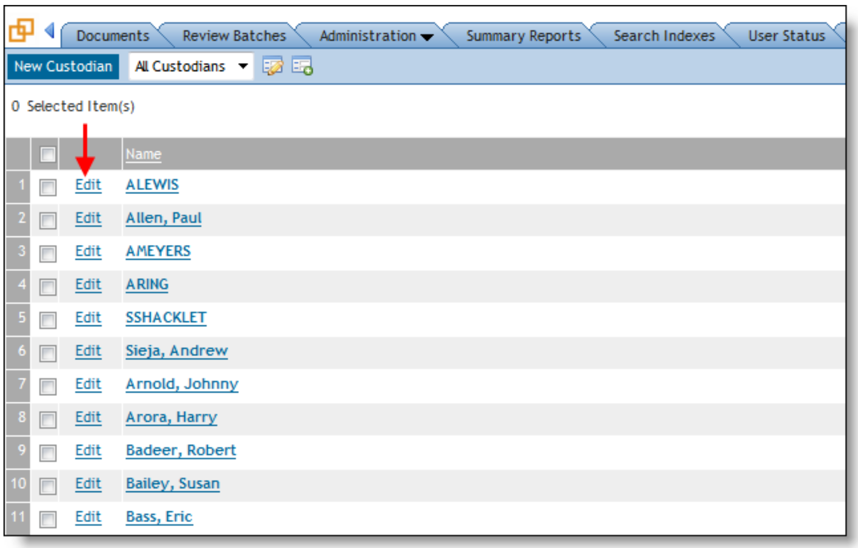
**Exercise completed**

## 4.4 Editing Custodian Information

Within the Custodians tab, values for the “Company” and “Start Date” fields may be coded.

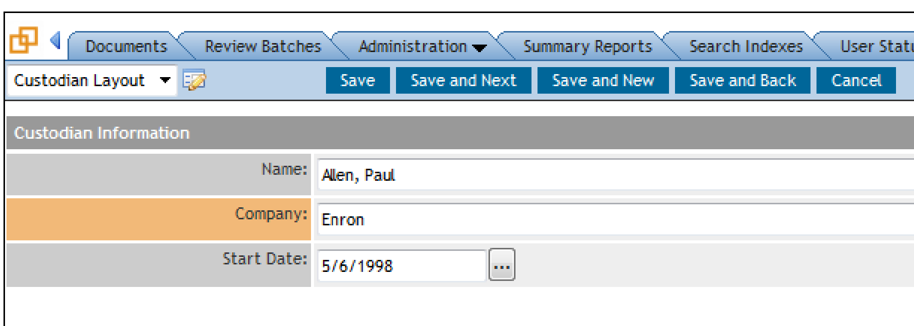
**→ Exercise: Editing Custodian Information**

1. Select the **Custodian** tab and click on the **Edit** hyperlink next to a custodian.




Edit custodian

2. Code each custodian’s information in the fields.



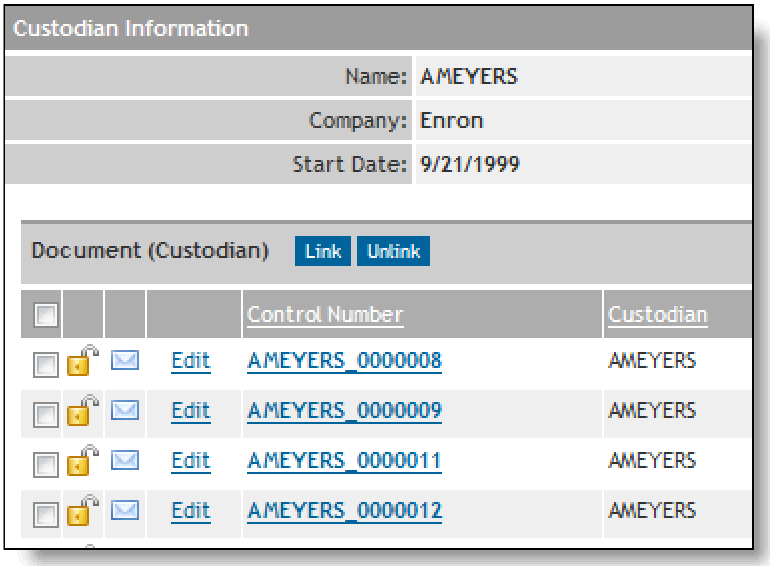

Custodian information

3. Click **Save**.

4. View your custodian information with all the corresponding documents below. This is the Custodian Object.

5. After you update the company information go to the Documents tab and add Custodian::Company to the view.

Notice edits in the Custodian tab carry over to the document tab.




Custodian object information with corresponding documents listed below

**Exercise completed**

## 5. Creating a Question Object

Custodians can have multiple documents linked to them but documents can have only one custodian. This is a one to many relationship – many documents to one custodian.

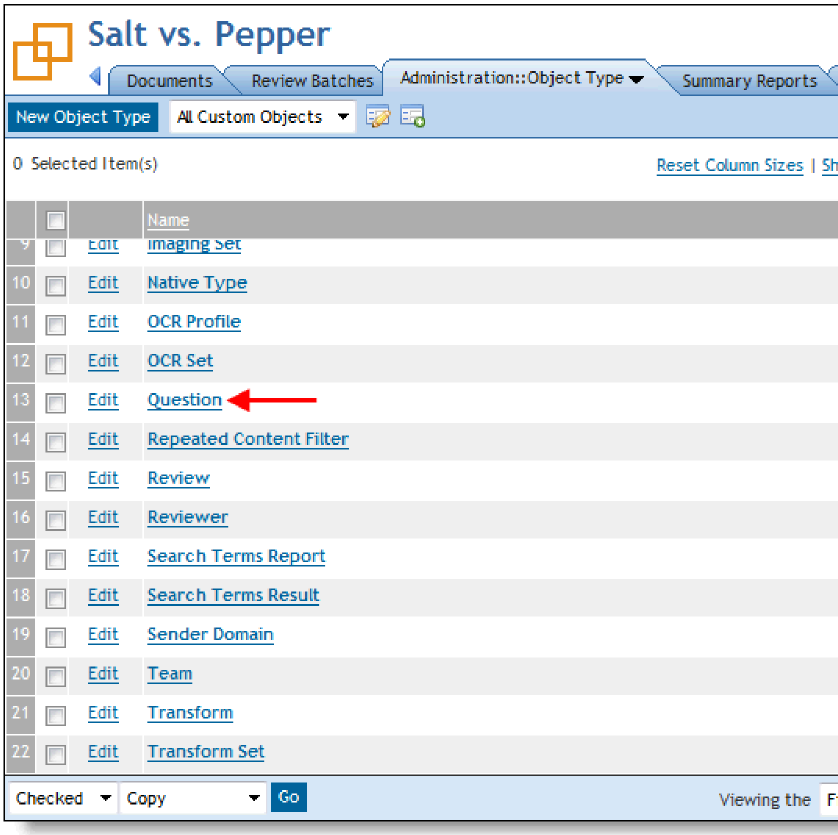
A reviewer may have one or many questions about a document, and each question may be associated with one or many documents – a many-to-many relationship.

In this exercise we are going to use the scenario of a question and answer object to build a conversation about a document.

**→ Exercise: Creating a Question Object**

1. Select the **Object Type** tab.
2. Click the **New Object** button.
   - Name: **Question**.
   - Parent Object Type: **Workspace.**
   - Enable Snapshot Auditing On Delete: **Yes**.

3. Click **Save & Back** The new Object Type Question appears in the list.




Object Type list

**Exercise completed**

## 5.1 Editing Views

After creating a Question object type, browse through other tabs in the system to view and verify the impacted changes. This is accomplished by editing the views within each tab to see which fields and layouts pertain to the object type.

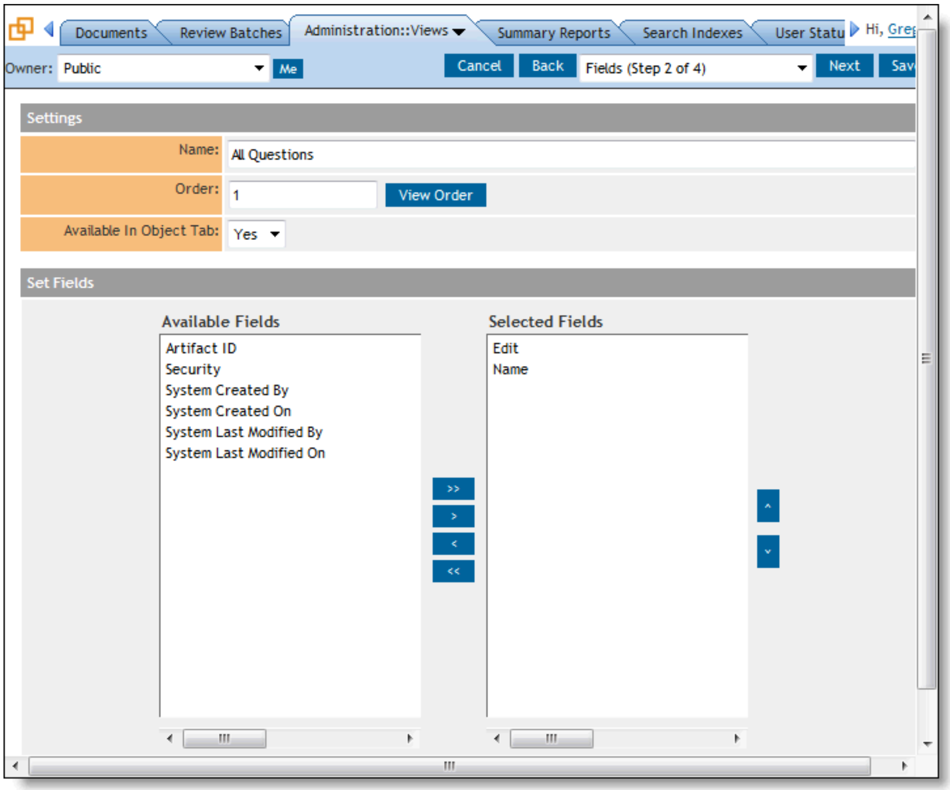
**→ Exercise: Editing Field and Layout Views**

If you completed the Custodian object exercise before you can skip this step and go to Section 6.0.

1. Select the **Fields** tab and click the **Edit View** button.

The Basic Information form opens on Step 1.

2. Leave Name as **All Fields** to view all system fields that pertain to the Question object.

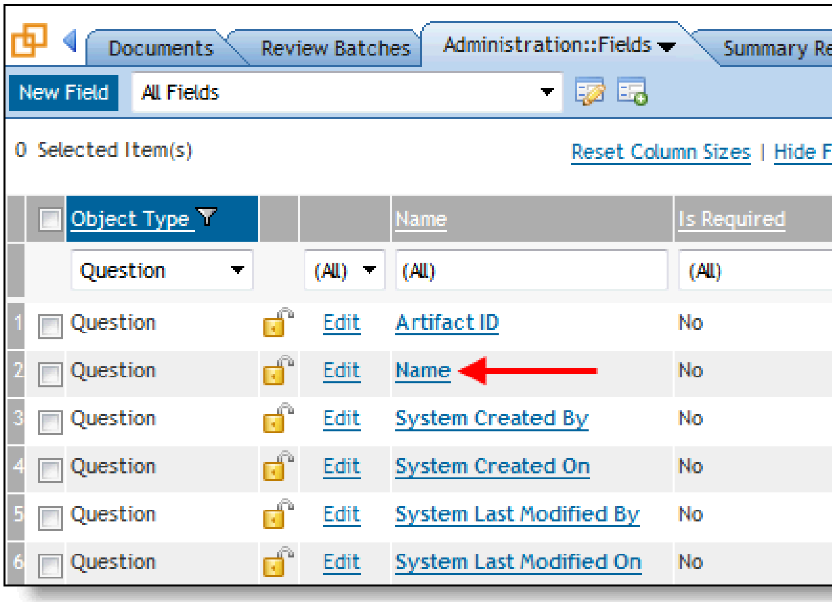



Basic Information

3. Select **Object Type** from Available Fields and move it to Selected Fields using the single blue arrow in the center. Adjust its position using the Up arrow on the right-hand side.

4. Click **Save**.

5. Click on the **Show Filters** links. In the Object Type you are now able to filter and view on Question.




Question filter

After editing your field view, you must do the same for your layout view.

6. Select the **Layouts** tab and click the **Edit View** button.
7. Leave Name as **All Layouts** to view all system layouts that pertain to the Question object.
8. Select **Object Type** from list of fields on the left Available Fields column and move right to Selected Fields using the single **blue arrow** in the center. Adjust its position using the Up arrows on the right-hand side.
9. Click **Done**.
10. Click on the **Show Filters** link. In the Object Type, you are now able to filter and view on Question.

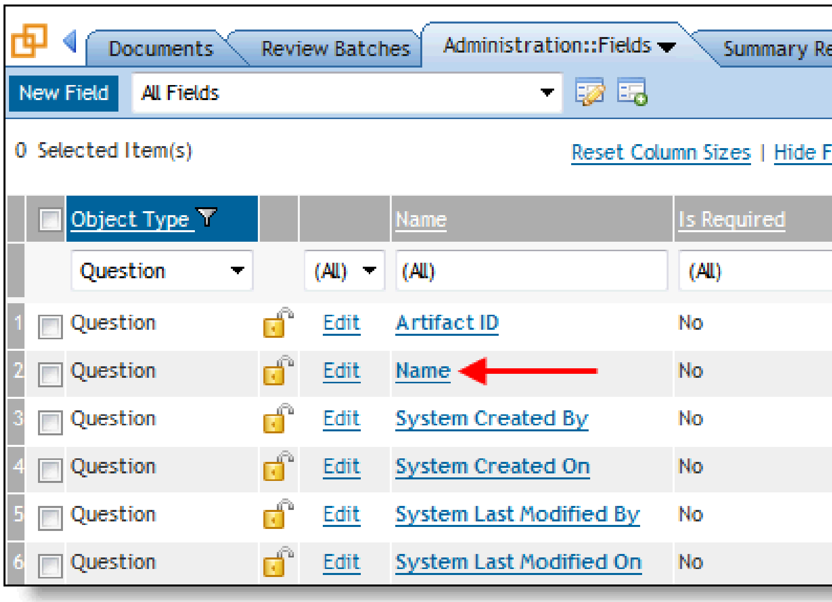
**Exercise completed**

# 6. Question Object Field Layout Creation

We have an object to store data but we need fields for that object. We are creating a question and answer field which will hold the information. The question can be a question about a document and the answer will be completed later by another reviewer, most likely a higher level reviewer.

## → Exercise: Adding Fields to Question object

1. Select the **Fields tab**.
2. Filter the fields to show the **Question** Object Type.
3. The **Name** field was created with the Object.




New Field List

4. Click on **Edit** and change the Name field to **Question**.
5. Click **Save**.
6. Create an Answer field:
   - Click the **New Field** button
   - Object Type: **Question**
   - Name: **Answer**
   - Field Type: **Long Text**
   - Open to Associations: **Yes**
7. Click **Save and New**.
8. Now we will create our Multiple Object field. This is a Document object field that connects the fields we just created.
   - Object Type: **Document**
   - Name: **Questions**

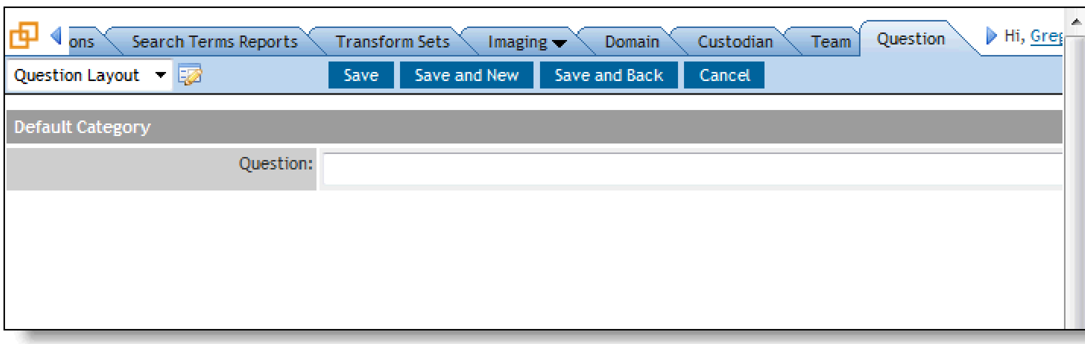
- Field Type: **Multiple Object**
- Object Type: **Question**

9. Click **Save**.

## 6.1 Question Views

Let's look at how the Question object can be used and create some views and layouts to help us see the object fields.

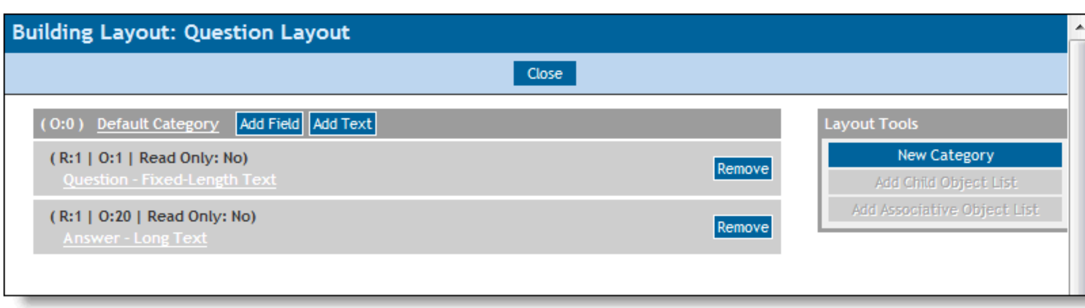
1. Select the **Question tab**. We need to make some questions so we can visualize how the objects work together.
2. Click **New Question.**




Question Field

Go ahead and type a question in the field and save it. We have no way to answer it yet so our next task will be to fix this layout to include the Answer field.

3. Click the **Layouts Tab** and filter on the **Question** object type.
4. Select the **Question Layout**.
5. Click **Build Layout**.




Question Layout

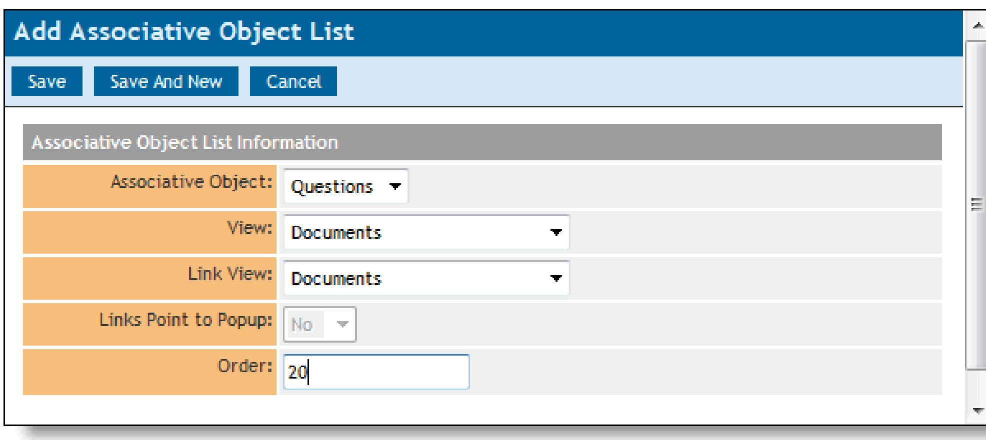
6. Click on the **Add Field** link first and select the Answer field.

- Category: **Default Category**
- Field: **Answer**
- Read Only: **No**
- Order: **10**

7. Click **Save**
8. The Answer field will then appear on the layout.
9. Next Click **Add Associative Object List**. This will add the documents view to the layout.

- Associative Object: **Document - Questions**
- View: **Documents**
- Link View: **Documents**
- Links to Popup: **No**
- Order: **10**

10. Click **Save.**

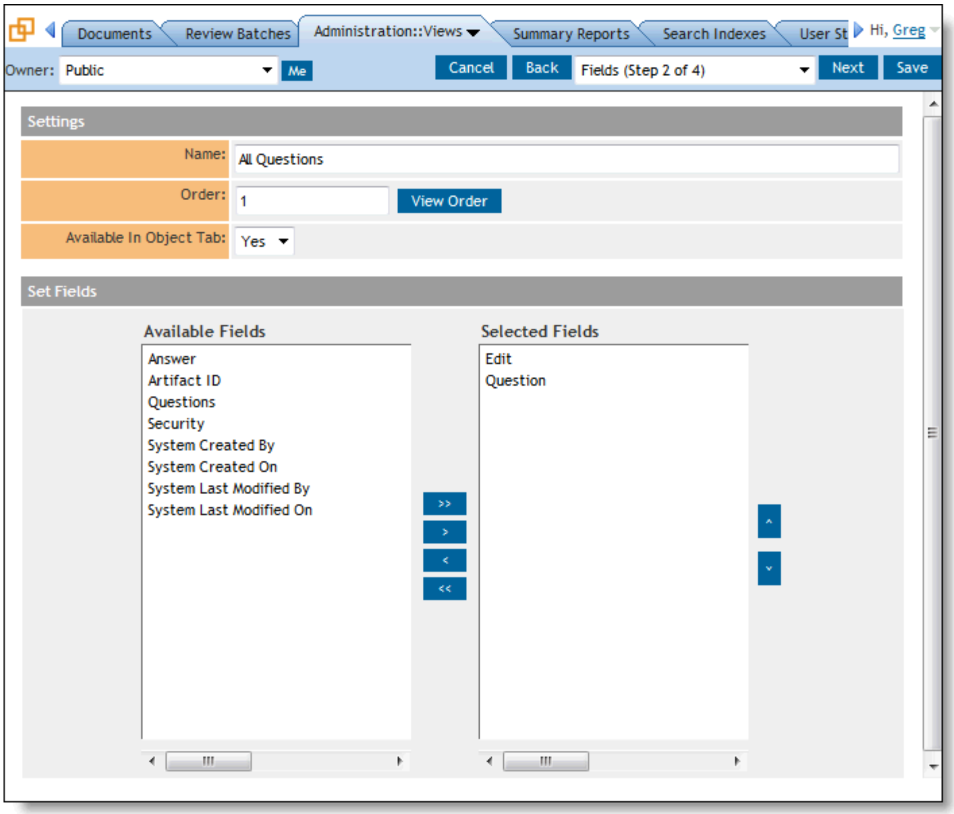



Adding Associative Object List

11. Next click on **Views tab** and filter Object Type to Question.
12. Click **Edit** for the **All Questions** view.

The Basic Information form opens on Step 1.

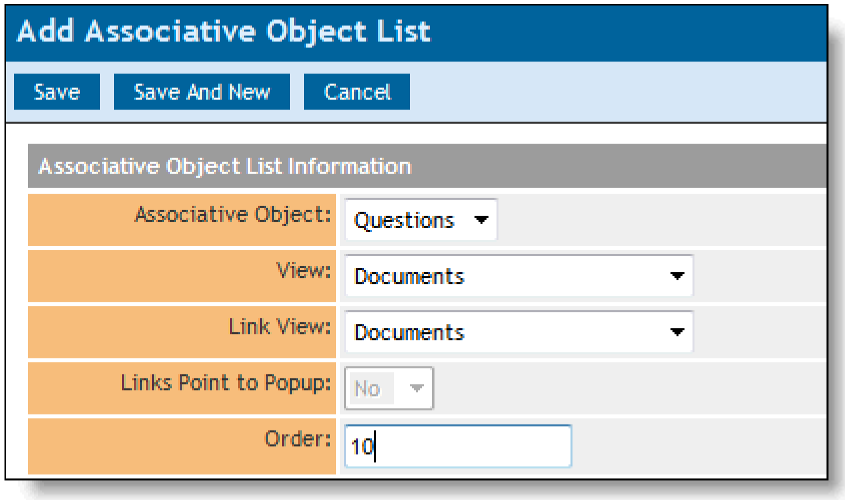
13. Click **Next**.
14. Double Click on **Answer** field in the left column to move it to the right, and then click **Done**.




All Questions view

While we are in the views tab we could create views for documents without answers to Questions or documents with Questions. If you have a senior level reviewer it might be helpful to have a list of questions that need answering and only those documents get reviewed by a senior level person.

15. Go to the **Layouts Tab** and select the **Basic** document layout.
16. Click **Add Associative Object List**
    - Associative Object: **Q & A**
    - View: **All Questions**
    - Link View: **All Questions**
    - Links Point to Popup: **No**
    - Order: **10**
17. Click **Save.**



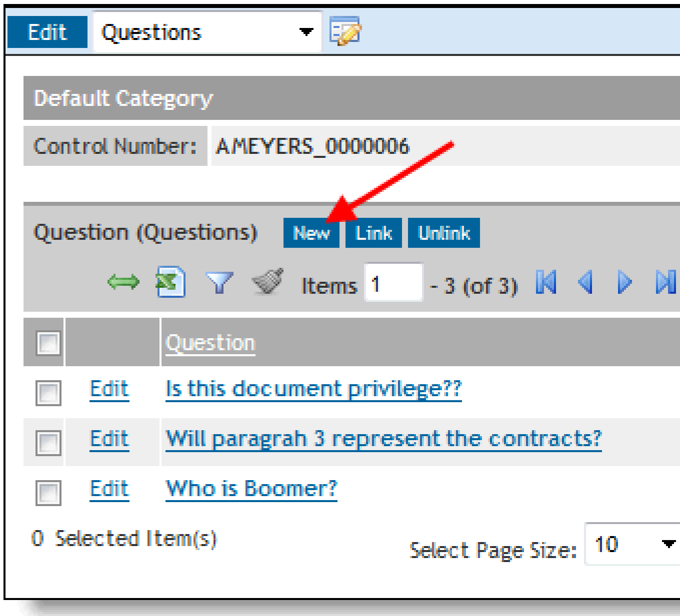

Update the Basic Layout with Associative Object List

By selecting “Yes” in the “Links Point to Pop-up” drop-down, Relativity will open a dialog box beside the document view. By selecting “No”, Relativity will navigate away from the document and redirect the reviewer to another page.

18. Click on the **Documents** Tab and open a Document.

19. Select the Basic layout from the coding drop-down. The Question section is displayed.

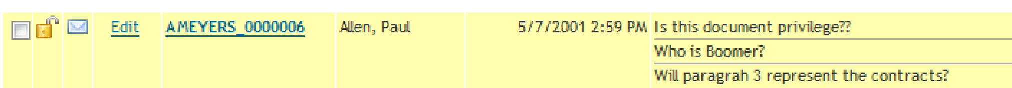
20. Click on the **New** button and add a Question and answer to this document.




Question section of Questions layout

21. Return to the document list.
22. Click on the **Edit View icon** and include **Q&A** and the **Q&A::Answer** field.
23. Click **Done**.

The documents and their corresponding Questions and Answers are listed. Layouts can be created which show only the Questions without Answers for higher level reviewers. Questions and Answers can be added to layouts for reviewers to note comments or answers regarding certain documents. You can shape your Question object from here.




Q & A Document View

# 7. Summary

Now you know the basics of creating Custom Objects and have all the tools necessary to create more complex objects. Custom Objects can be used to make more efficient use of data entry and organization. The possible configurations are endless.

## 8. Proprietary Rights