

EmailEventHandler

V8.0.0.19

Relativity® 9.2 & above, RelativityOne

06/12/2019

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1 Overview

The TSD Email Event Handler application provides the ability to send one or more emails from a layout so that users can be notified about edits to the current record.

1.1 Supported versions

This application is supported in Relativity versions 9.2 & above, RelativityOne

1.2 Category

- This custom solution consists of the following components:
 - Relativity Application
 - Event handlers

1.3 Special considerations

- Email Templates do not support the ArtifactID Column.
- A colon “:” is the default object indicator used when the value is empty in the email template. The value of the object indicator can be customized in the email template.
- Field values will not be returned if the field name contains the object indicator.
- Files from “File” fields can be sent as attachments to the emails, depending on the “Send File Fields as Attachments” Yes/No field, which is part of the Email Template Layout.
- “Default Values Behavior” field, which is part of the Email Template Layout gives the ability to add extra users as recipients or override the default set of recipients.
- Be mindful of who layout emails are sent, it may be possible to send information about objects to users without sufficient access.
- The solution can timeout depending on the number of fields that exist on an object. We recommend referencing no more than 5 objects in multi-object fields and referencing views that display no more than 5 objects.
- The solution assumes the Relativity environment has the correct SMTP settings configured.
- The value of the **Object Name** field on the **Email Template** object must exactly match the name of the custom object.
- Fields on User Objects is not supported.
- The following items should be added to the Custom Object for configuration and then added to the object’s layout specified in the **Email Template**:
 - A Yes/No field that indicates an email should be sent
 - When set to yes and configured in a template, an email will be sent
 - A multi-object field that points to the **Users** object
 - The users added to the multi-object field on the custom object will receive the sent email

- Once an email is sent, the **Send Email Trigger Field** and **Send Email To Field** will be cleared out

Note: If you will be overriding the **Send Email** and **Send Email To field** values by setting the **Default Send Email** and **Default Send Email To Values** in the Email Template, it is recommended that you do not add the **Send Email** and **Send Email To** fields to the object's layout. You are only required to add these fields to the object's layout when the **Default Send Email** and **Default Send Email To Values** are not set in the **Email Template**.

- If **Default Send Email Value** is not set, then the selected **Send Email Trigger Field** must be on the specified layout otherwise no email will be sent.
- If **Default Send Email To Value** is not set, then the selected **Send Email To Field** must be on the specified layout otherwise no email will be sent.
- The view syntax(<view:123456>) can only be used when the specified view exists on the layout specified in the email template configuration.
- The **Email History** field will be populated with the Web Server local time.
- The event handler will be triggered only on the Save or Save & Next actions, and therefore will not apply to mass edit operations or associated object list modifications.
- The **Produced Documents** field is not supported.
- This rule will apply only to the coding performed after the event handler is implemented. Pre-coded objects would need to be re-coded for the rule to take effect.
- If upgrading from a previous version, please make sure to update the **Layout Artifact ID**, **Send Email Trigger** and **Send Email To** fields on each **Email Template**. Failing to update accordingly will cause the application to fail.
- The event handler will be coded with the name of the fields and choices; if the name of any of the fields or choices is changed, the event handler will not work as desired.
- The field and choice names are case sensitive, if the case or field names do not match exactly an error will be thrown.
- Only users that have been granted explicit access to the workspace will be displayed in the **User** field drop down list on the **Users** Object.
 - System Administrators must be part of a group other than System Administrations in order to be displayed in the **User** field drop down list on the **Users** Object.
- Having an existing object with the names **Email Template** and **Users** may cause problems with installation and performance.
- While each solution is carefully built and thoroughly tested to work on your version of Relativity, they are not considered core features and are not eligible for the same level of support as the Relativity platform.

2 Functionality

This solution is comprised of the following objects:

- **Users** (created by this solution)
- **Email Template** (created by this solution)
- **Custom Object** (created by the end user)

When a template exists for the current object and layout being edited, an email will be sent when the **Save** or **Save & Next** button is clicked and the following criteria are met:

- The selected **Send Email Trigger Field** is set to **Yes** OR the **Default Send Email Value** is set to **Yes**
 - When the **Default Send Email Value** is set, it will override the value chosen in the **Send Email Trigger Field** on the layout
- The selected **Send Email To Field** is set OR the **Default Send Email To Value** is set
 - When the **Default Send Email To Value** is set, it will override the value chosen in the **Send Email To Field** on the layout

The email will be sent with the following information:

- **Email To** – If the **Default Send Email To Value** is set, that email list will be used. Otherwise, the value will be pulled from the **Send Email Trigger Field** currently set on the layout.
- **Email From** – If the **Send Email From Logged in User** field is set to **Yes**, the email will be sent from the user who is making the edit. Otherwise, the value will be pulled from the **Email From** field in the template.
- **Email Subject** – This is pulled from the **Email Subject** specified in the template.
- **Email Body** – This is pulled from the **Email Body** specified in the template.

3 Deployment

Follow the steps below to deploy the application to your instance of Relativity. Import the application file **RA_Email_Event_Handler.rap** through the Relativity Applications Tab in the Admin section. Please be advised that there are two sets of installation instructions.

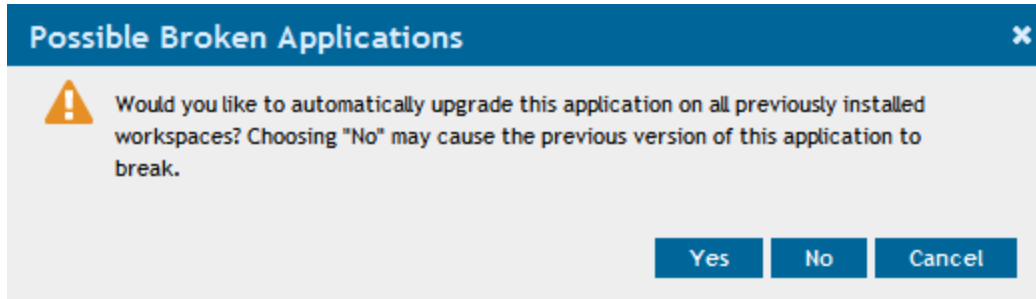
- **Section 3.1** applies to Relativity environments that already have a previous installation of the application.
- **Section 3.2** applies to Relativity environments in which the application is being installed for the first time.

Please select the appropriate option for your environment.

3.1 Upgrading from a previous version

1. Log in to Relativity
2. Navigate to the **Admin/Home** section
3. Navigate to the **Application Library** tab

4. Click the Upload Application button
5. Click the **Browse...** button for the **Application File** field
6. Select the location of the **RA_Email_Event_Handler.rap** file and click **Open**
7. Click the **Save** button
8. You will be prompted to automatically update all workspaces where this application was previously installed. Click **Yes**.



9. In the Workspaces Installed section, the Status for all workspaces will change from *Pending...* to *Installation in progress...* and eventually *Installed*, indicating that installation is complete.
10. On all existing **Email Templates**, please make sure to provide a value for the following required fields, otherwise the application will not function as intended:
 - a. Layout Artifact ID
 - b. Send Email Trigger
 - c. Send Email To


3.2 New Installation

1. Log in to Relativity
2. Navigate to the **Admin/Home** section
3. Navigate to the **Application Library** tab
4. Click the **Upload Application** button
5. Click the **Browse...** button for the **Application File** field
6. Select the location of the **RA_Email_Event_Handler.rap** file and click **Open**
7. Click the **Save** button
8. In the **Workspaces Installed** section, click the **Install** button
9. In the **Workspaces** section, click the ellipsis (...) button
10. In the popup window, select the desired workspace(s) and click the **Ok** button
11. Click the **Save** button

4 Input and preparation

4.1 Workspace Setup

1. Create the following fields on the Custom Object. You may create multiple sets of the **Send Email** and **Send Email To** fields (with unique names) which match the fields selected in an associated **Email Template**.
 - a. **Send Email** – Yes/No
 - i. The field can be named anything
 - ii. The field name must be unique
 - b. **Send Email To** – Multiple Object
 - i. The field can be named anything
 - ii. The field name must be unique
 - iii. Set Associative Object Type to **Email Users**
 - c. **Email History** – Long Text
 - i. The field name must be “Email History”
 - ii. You are only required to create one instance of this field for each *custom object* that will be using this solution.
2. Add the created fields to the layout(s) for the custom object.
 - a. **Note:** If you will be overriding the **Send Email** and **Send Email To field** values by setting the **Default Send Email** and **Default Send Email To Values** in the **Email Template**, it is recommended that you do not add the **Send Email** and **Send Email To** fields to the object’s layout. You are only required to add these 2 fields to the object’s layout when the **Default Send Email** and **Default Send Email To Values** are not set in the **Email Template**.
3. Add the Event Handler to the Custom Object. Perform this step for new installations of this solution and new **Custom Objects** within a workspace.
 - a. Click on the **Administration Tab**
 - b. Click on **Object Type**
 - c. Select the **Custom Object**
 - d. Under Event Handlers select:
TSD.EEH.EventHandlers.SendEmailForCustomObject
4. Create a **Smtip Configuration** record.
 - a. Navigate to **TSD Email Event Handler: Smtip Configuration** tab
 - b. Select **New Smtip Configuration**
 - i. **Instance Settings** configuration type – the appropriate instance settings section and keys need to be set, so the Smtip values are retrieved according them:

Smt Configuration Layout ▾ 

[Edit](#)
[Delete](#)
[Back](#)
[Edit Permissions](#)
[View Audit](#)

SMTP Configuration

Name: Instance Settings Configuration

Type: Instance Settings

Smtp Server Key: SMTPServer Instance Settings Section: kCura.Notification


Smtp Username Key: SMTPUserName

Smtp Password Key: SMTPPassword

Smtp Port Key: SMTPPort

Requires SSL Key: SMTPSSLisRequired

- ii. **Secret Store** configuration type – the appropriate instance settings values need to be set. Once the configuration is saved, those values will be saved in **Relativity Secret Store** and will no longer be visible in the layout.

Smt Configuration Layout ▾ 

[Save](#)
[Save and New](#)
[Save and Back](#)
[Cancel](#)

SMTP Configuration

Name: Secret Store Configuration Secret Store Path: EmailEventHandler/Smtp

Type: Secret Store For example: "EmailEventHandler/Smtp"

Smtp Server: smtpserver.tsd.com

Smtp Username: smtpuser_tsd

Smtp Password:

Smtp Port: 45

Smtp SSL Required:

Note: Keep in mind, that different Secret Store Paths must be used for separate configurations to avoid overriding.

5. Create an **Email Template** record

- a. Navigate to the **TSD Email Event Handler: Email Template** tab
- b. Select **New Email Template**
- c. Enter the following Custom Object Information.
 - i. **Layout Artifact ID** – The Artifact ID of the *Custom Object*'s Layout the email template relates to.
 - ii. **Object Name** – The exact name of the object the template will apply to
 - 1. This is case sensitive
 - iii. **Object Indicator Character**– This field allows the user to custom the object indicator. When blank the object indicator by default is a colon ":". This optional field is available to give users the flexibility to access fields with names that may already include the default object indicator. E.

Example:

A user wants to print the value of a field named: "**Notes: Doctor**". The user must change the object indicator in order to print the field because the field name contains a colon which is the default object indicator. After changing the object indicator to ^, the user is able to print the field in the following manner: <**Notes:Doctor**>.

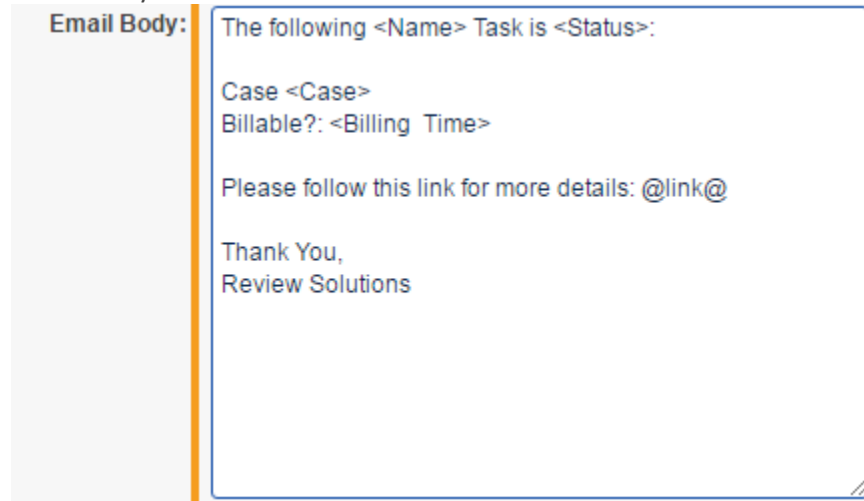
The updated object indicator also allows the field to be printed with the **@PrintWholeLayout@** placeholder.

The update will require any default object indicators in the template to be updated to the new value.

Placeholders with Default Object Indicator	Placeholders with Customized Object Indicator
<parent:>	<parent^>
<parent:name>	<parent^name>
<child:>	<child^>
<child:childObject:name>	<child^childObject^name>
<objectField:responsive>	<objectField^responsive>

- iv. **Send Email Trigger Field** – The Yes/No field located on the layout (located above) for the **Custom Object**. This field will determine whether an email is sent.
 - v. **Default Send Email Value** – To override the **Send Email Trigger Field**, set the **Default Send Email Value**. If **Yes** is selected, an email will be sent each time the object is saved regardless of what is set in the **Send Email Trigger Field** on the layout. If **No** is selected, an email will not be sent regardless of what is set in the **Send Email Trigger Field** on the layout.
 - vi. **Send Email To Field** – The Multiple Object field located on the layout (located above) for the **Custom Object** (not the **Users** object). This field will determine the list of email recipients.
 - vii. **Default Send Email To Value** – To override the **Send Email To Field**, set the **Default Send Email To Value**. When this field is set, the email will be sent to the users who are selected regardless of what is set in the **Send Email To Field** on the layout.
- d. Enter the following Email Information.
- i. **Name** – Descriptive name of the Email Template
 - ii. **Email From** – The email address the email will be sent from
 - 1. **Note:** You cannot set the **Email From** field if the **Send Email From Logged in User Field** is set to **Yes**
 - iii. **Send Email From Logged in User** – To have the email sent from the user who is saving the object, set this field to **Yes**. To have the email sent from the email address specified in the **Email From** field, set this field to **No** or do not set this field.
 - iv. **Email Subject** – The subject of the email
 - v. **Email Body** – The body of the email to be sent

1. Use <> in order to get information from the fields on the Custom Object, the name of the fields need to be formatted as <Field Name>
2. The Field Name is case sensitive, and needs to appear exactly as it does in Relativity.



3. The following field type are supported:
 Fixed Length Text, Whole Number, Date, Long Text, Decimal, Single Choice, Multiple Choice, Single Object, Multiple Object, Currency, Yes/No, User and File Fields. Fields on Parent and Child Objects are also supported, please see the chart in section 5.
4. Use @link@ in order to display a link to the record within the email
5. @fields@ -- if @fields@ is on the template, all field values from the layout will appear on the email
6. @PrintWholeLayout@ -- if @PrintWholeLayout@ is on the template a HTML representation of the layout will appear on the email including categories and views.

vi. Smtip Configuration – the Smtip configuration that will be used for sending emails.

6. Configure the **Users** Object

Note: Only users that have been granted explicit access to the workspace will be displayed in the **User** field dropdown list on the **Users** Object. System Administrators must be part of a group other than System Administrations in order to be displayed in the **User** field dropdown list on the **Users** Object.

- a. Click **Email Event Handler** → **Users Object**
- b. Click on the **New Users** button
- c. Select desired user
 - i. When the user is saved, the email address will be populated automatically.

Please note that Steps 1 – 4 will need to be repeated for every custom object you want to associate to this application for sending emails.

Appendix A Object Indicator Character

The Object Indicator Character in email templates allow the users to custom the object indicator. When blank the object indicator by default is a colon “:”. This optional field is available to give users the flexibility to access fields with names that may already include the default object indicator. E.

The screenshot shows the 'Custom Object Information' configuration page. The fields are as follows:

- Layout Artifact ID: 1038326
- Object Name: TestRDO
- Object Indicator Character: (empty field, highlighted with a blue circle)
- Send Email Trigger Field: Send Email (with a 'Clear' button)
- Default Send Email Value: Yes, No
- Send Email To Field: TRSend Email (with a 'Clear' button)
- Default Send Email To Value: hristov@tsd.com, amoncheva@tsd.com, ddobrev@tsd.com (with a 'Clear' button)

Example:

A user wants to print the value of a field named: “Notes: Doctor”. The user must change the object indicator in order to print the field because the field name contains a colon which is the default object indicator. After changing the object indicator to ^, the user is able to print the field in the following manner: <Notes:Doctor>.

The updated object indicator also allows the field to be printed with the @PrintWholeLayout@ placeholder.

The update will require any default object indicators in the template to be updated to the new value.

Syntax Examples:

Placeholders with Default Object Indicator	Placeholders with Customized Object Indicator
<parent:>	<parent^>
<parent:name>	<parent^name>
<child:>	<child^>
<child:childObject:name>	<child^childObject^name>
<objectField:responsive>	<objectField^responsive>

Appendix B Syntax Examples

Placeholder	Description
@PrintWholeLayout@	Displays a HTML representation of the layout including categories and views.
@fields@	Displays all the fields on the main object
@link@	Displays a link to the main object
<FieldName>	Displays the field value of a field on the main object
<ObjectFieldName:InnerFieldName>	Displays the field value of the objects associated with the main objects, object field(Single and Multi object fields supported)
<Parent:>	Displays the name of the main object's parent object
<Parent:FieldName>	Displays the field value of a field on the main object's parent object
<Parent:ObjectFieldName:InnerFieldName>	Displays the field value of the objects associated with the main object's parent object, object field(Single and Multi object fields supported)
<Child:>	Displays the name of all the child objects
<Child:ObjectTypeName:FieldName>	Displays the field value of ObjectType child objects of the main object
<Child:ObjectTypeName:ObjectFieldName:InnerFieldName>	Displays the field value of the objects associated with the main object's children of ObjectType, object field(Single and Multi object fields supported)
<View:1234567>	Displays an HTML representation of the view denoted by the specified artifactID(e.g. 1234567). The view must exist on the layout that is specified in the email template configuration.

These examples use the default object indicator which is a colon ":". Replace the colon in these examples if a customized object indicator is specified in your email template. Whenever the object indicator field is blank in an email template, this solution defaults to using a colon.

Appendix C Printing a Whole Layout

1. Specify the @PrintWholeLayout@ syntax in your Email Template:


The screenshot displays the configuration interface for an email template. At the top, there are navigation tabs for 'Email Template', 'Users Object', and 'Smtp Configuration'. Below these is a breadcrumb 'Email Template Layout' with an edit icon and a set of action buttons: 'Save', 'Save and Next', 'Save and New', 'Save and Back', and 'Cancel'.

The main content is divided into two sections:

- Custom Object Information:**
 - Layout Artifact ID: 1038326
 - Object Name: TestRDO
 - Object Indicator Character: (empty)
 - Send Email Trigger Field: Send Email (with a 'Clear' button)
 - Default Send Email Value: Yes, No
 - Send Email To Field: TRSend Email (with a 'Clear' button)
 - Default Send Email To Value: hristov@tsd.com, amoncheva@tsd.com, ddobrev@tsd.com (with a 'Clear' button)
- Email Information:**
 - Name: Email Template Test
 - Email From: hristov@tsd.com
 - Send Email From Logged in User: Yes, No
 - Email Subject: Test Email Subject
 - Email Body: @PrintWholeLayout@ (this text is highlighted with a blue circle)

2. Resulting email:

TestRDO TestChildRDO SampleRDO

TestRDO Layout 

Default Category **Relativity Object Layout**

SampleRDO: Sample RDO Test

Name: Test RDO

SingleChoice: Select Me!

MultipleChoice: Green, Blue;

SingleObject:

TrMultipleObject:

Currency: \$123.00

YesNo:

File:

User field: Hristov, Hristo





TRSend Email:





Send Email:



TestChildRDO

<input type="checkbox"/>	Name
<input type="checkbox"/>	Edit Child RDO

0 Selected Item(s)

 Reply  Reply All  Forward  IM

 hristov@tsd.com |  Hristo D. Hristov;  Antonia D. Moncheva;  Dobromir Z. Dobrev ▾

 HD  Test Email Subject

[@PrintWholeLayout@ email:](#)

Default Category

SampleRDO: Sample RDO Test

Email History:

User field: Hristov, Hristo

Name: Test RDO

SingleChoice: Select Me!

MultipleChoice: Green, Blue

SingleObject:

TrMultipleObject:

Currency: \$123.00

YesNo: Yes

File:

TRSend Email:

Send Email: No

Appendix D Printing a View Located On a Layout

1. Specify the <view:123456> syntax in your Email Template, where 123456 represents the artifactID of the view that exists on the layout.

Please note that the Object Indicator Character is blank in the email template, in this case a “.” is used for the object indicator by default. <view^1234567> would be used if the Object Indicator Character was customized to be “^”.

The screenshot displays the configuration interface for an email template. At the top, there are navigation tabs for 'Email Template', 'Users Object', and 'Smtp Configuration'. Below these is a dropdown menu for 'Email Template Layout' and a set of action buttons: 'Save', 'Save and Next', 'Save and New', 'Save and Back', and 'Cancel'.

The main content area is divided into two sections:

- Custom Object Information:** This section contains several fields:
 - Layout Artifact ID:** A text input field containing '1038326'.
 - Object Name:** A text input field containing 'TestRDO'.
 - Object Indicator Character:** An empty text input field.
 - Send Email Trigger Field:** A dropdown menu showing 'Send Email' with a 'Clear' button.
 - Default Send Email Value:** Radio buttons for 'Yes' (selected) and 'No'.
 - Send Email To Field:** A dropdown menu showing 'TRSend Email' with a 'Clear' button.
 - Default Send Email To Value:** A list of email addresses: 'hhrstov@tsd.com', 'amoncheva@tsd.com', and 'ddobrev@tsd.com', with a 'Clear' button.
- Email Information:** This section contains fields for:
 - Name:** 'Email Template Test'.
 - Email From:** 'hhrstov@tsd.com'.
 - Send Email From Logged in User:** Radio buttons for 'Yes' and 'No'.
 - Email Subject:** 'Test Email Subject'.
 - Email Body:** A text area containing '<view:123456>', which is highlighted with a blue box.

2. Resulting email:

Default Category

SampleRDO: Sample RDO Test

Name: Test RDO

SingleChoice: Select Mel

MultipleChoice: Green, Blue;

SingleObject:

TCRMultipleObject:

Currency: \$123.00

YesNo:

File:

User field: Hristov, Hristo

TRSend Email:

Send Email:

Email History:

TestChildRDO New Delete

Items 1 - 3 (of 3)

Name	SingleChoice	SingleObject	MultipleChoice	TCRMultipleObject
Edit Child RDO	Sausage Pizza	test3	Batman, Spiderman	
Edit ChildRDO 2	Sausage Pizza	test3	Batman, Spiderman	test3
Edit ChildRDO 3	Sausage Pizza	1 - Copy (6)	Batman, Spiderman, Superman	

0 Selected Item(s) Select Page Size: 10

Reply Reply All Forward IM

hristov@tsd.com | Hristo D. Hristov, Antonia D. Moncheva, Dobromir Z. Dobrev

Test Email Subject

1:49 PM

Name	SingleChoice	SingleObject	MultipleChoice	TCRMultipleObject
Child RDO	Sausage Pizza	test3	Batman, Spiderman	
ChildRDO 2	Sausage Pizza	test3	Batman, Spiderman	test3
ChildRDO 3	Sausage Pizza	1 - Copy (6)	Batman, Spiderman, Superman	

3. To find the Artifact ID of a view click on the view portion of the layout in the build layout window:

Edit Layout Information: TestRDO Layout Save Save and Close Close

Default Category

SampleRDO: _____ Email History: _____

Name: _____

SingleChoice: _____

MultipleChoice: _____

SingleObject: _____

TrMultipleObject: _____

Currency: _____

YesNo: _____

File: _____

User field: _____

TRSend Email: _____

Send Email: _____

LAYOUT OPTIONS

Properties ▾

Object: TestChildRDO

View: All TestChildRDOs ▾

Link View: All TestChildRDOs ▾

Links Point to Popup: Yes No

Friendly Name: _____

Add Category ▾

Fields

Search for a field to add

- Custom Text
- Artifact ID
- File File Size
- File Text
- SingleObject: Relativity Image Count
- System Created By
- System Created On
- System Last Modified By
- System Last Modified On

TestChildRDO (child) ×

4. The name of the view is highlighted above

5. Navigate to the Views tab, filter appropriately for the corresponding object and click on the view that matches the name in the previous step

Documents Review Batches Reporting ▾ Case Admin ▾ Index Admin ▾ Job Admin ▾ Application Admin ▾ **Workspace Admin**

Workspace Details Object Type Fields Choices Choices List Layouts **Views** Tabs History User Status

🔍 New View All Views ▾

#	Object Type	Name	View Type	Visible	Render Links	Order
1	TestChildRDO	All TestChildRDOs	Admin Update	Yes	Yes	

6. After the window loads, the ArtifactID of the corresponding view can be found in the URL of the window

The screenshot shows a web browser window displaying the 'Email Event Handler WS' application. The browser's address bar shows a URL ending in 'ArtifactID=10383248', which is highlighted with a blue circle. A blue arrow points from the 'Views' tab in the application's navigation bar to this URL. The application's navigation bar includes tabs for 'Documents', 'Review Batches', 'Reporting', 'Case Admin', 'Index Admin', 'Job Admin', 'Application Admin', and 'Workspace Admin'. Below the navigation bar, there are buttons for 'Edit', 'Delete', 'Back', and 'Edit Permissions'. The main content area is divided into two sections: 'View Information' and 'Record History'. The 'View Information' section displays the following details:

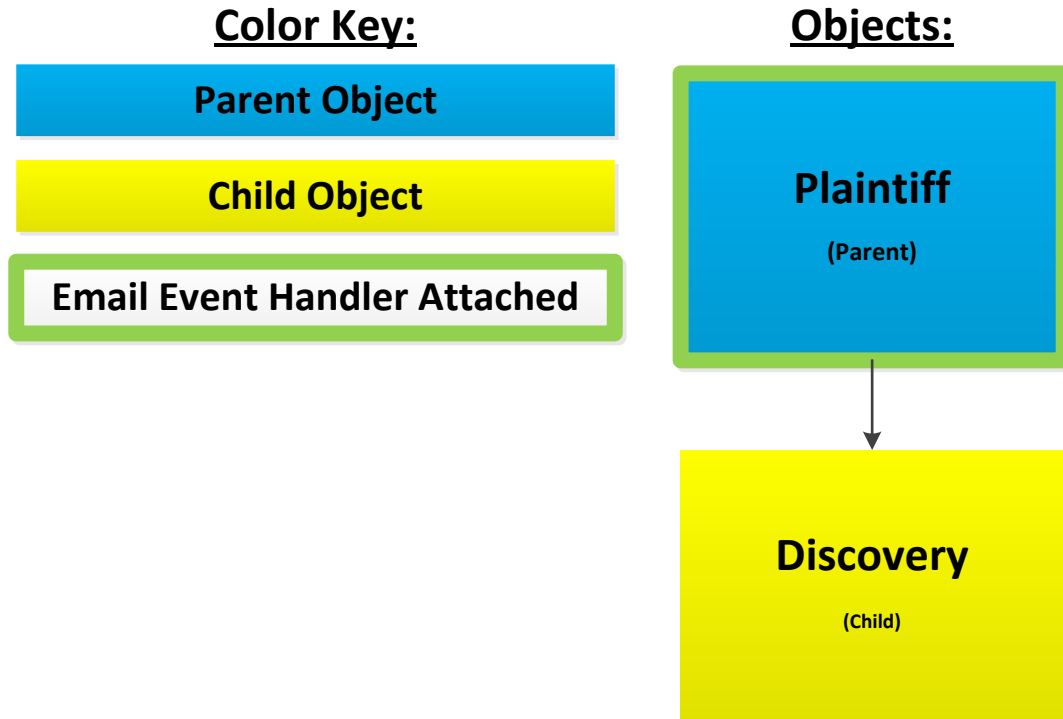
Name:	All TestChildRDOs
Object Type:	TestChildRDO
Order:	1
Visible In Dropdown:	Yes
Visualization Type:	Standard List
Relativity Applications:	Email Event Handler Test Objects
Query Hint:	

The 'Record History' section shows the following information:

Created:	Service Account, Relativity - 12/5/2018 12:28:29 AM PST
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Appendix E Example with Parent Object

The email event handler is attached to an object that is the parent of other objects



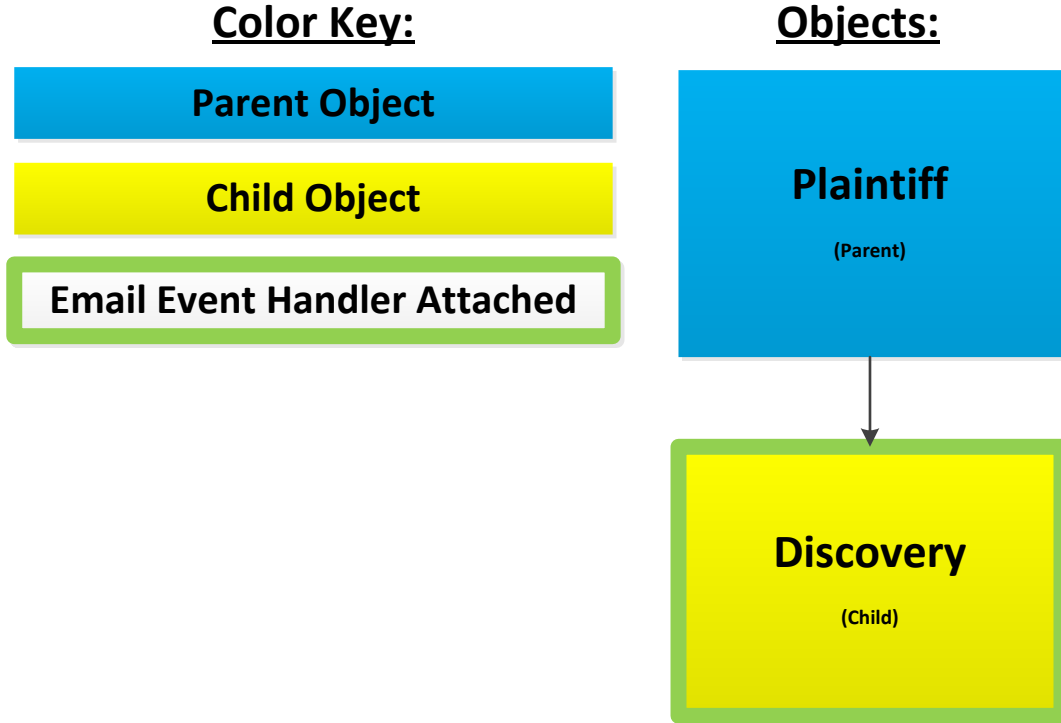
Placeholder	Displayed Value	Description
@fields@	All the fields on the Plaintiff Object	
@link@	A link that points to the Plaintiff Object	
<Trial Date>	10/16/2017	The Value of the trial date field on the Plaintiff Object
<Plaintiff:Event Type>	Pre-Trial Trial	The value of the Event Type field on the Deadline object which is attached to the Plaintiff Object's Plaintiff field
<Parent:>		No value is returned because Plaintiff is a top level object and has no parent RDO.
<Parent:FieldName>		No value is returned because Plaintiff is a top level object and has no parent RDO.
<Parent:ObjectFieldName:InnerFieldName>		No value is returned because Plaintiff is a top level object and has no parent RDO.
<Child:>	Displays the names of the Children to the Plaintiff Object	

<Child:Discovery:Discovery File Size>	Displays the value of the Discovery File Size of the all the Discovery Type Children of the Plaintiff Object	
<Child:Discovery:ExampleObjField:InnerField>	Displays the value of the inner field that is on the objects associated with the Discovery object's ExampleObjField. The Discovery object is a child of the Plaintiff Object	

These examples use the default object indicator which is a colon “:”. Replace the colon in these examples if a customized object indicator is specified in your email template. Whenever the object indicator field is blank in an email template, this solution defaults to using a colon.

Appendix F Example with Child Object

The Email Event Handler is attached to an object that has a Parent Object.



Placeholder	Displayed Value	Description
@fields@	All the fields on the Discovery Object	
@link@	A link that points to the Discovery Object	
<Discovery File Size>	1000	The Value of the trail date field on the Discovery Object
<ObjField:InnerField>	Field Value of Objects associated with the ObjField	
<Parent:>	Name of the Plaintiff Parent Object	
<Parent:FieldName>	Field Value of the Plaintiff Parent Object	
<Parent:ObjectFieldName:InnerFieldName>	Field Value of object associated with the Parent Plaintiff Object's Object field (Single and Multi Object fields are supported)	
<Child:>	<Child:>	No value is returned because the Discovery object is not the parent of any object
<Child:Discovery:Discovery File Size>	<Child:Discovery:Discovery File Size>	No value is returned because the Discovery object is not the parent of any object
<Child:Discovery:ExampleObjField:InnerField>	<Child:Discovery:ExampleObjField:InnerField>	No value is returned because the Discovery object is not the parent of any object

These examples use the default object indicator which is a colon ":". Replace the colon in these examples if a customized object indicator is specified in your email template. Whenever the object indicator field is blank in an email template, this solution defaults to using a colon.

5 Support

For additional assistance, contact TSD Client Services at support@tsd.com.

6 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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