

CAN WE USED OLD CASE ID AS THE MAIN IDENTIFIER WHEN AUTO-SAVING EMAILS?

Yes! This is possible. To do this we need to perform specific actions.

WHERE DO I SET THIS?

The old case id as an identifier is set using a value in PAT_DMS_SETTINGS. The value is called **old.case.id.reg.ex.conf**.

The setting and description below.

old.case.id.reg.ex.conf	<empty>	A list of permitted old case id regular expressions, formatted as a json string. This is used when searching for valid old case ids in emails or free-form text such as OCR. Sample usage of old.case.id.reg.ex.conf that can scan for three types of old case number patterns: {"version":1,"regExList":["([0-9]+-[A-Z0-9]+-[A-Z0-9]+)","([0-9]+-[A-Z0-9]+-[A-Z0-9]+-[A-Z0-9]+)","(\b(0-9){3}[A-Z]{4}-[0-9]{1,4})"]}
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Further reading can be found below.

https://doc.practiceinsight.io/display/DMS/PAT_DMS_SETTINGS+Configuration

HOW DO I SET THIS UP?

The first step would be read the **old.case.id.reg.ex.conf** description. We can see we need to provide regular expressions and then insert that as the value into our PAT_DMS_SETTINGS.

So the process as follows;

1. First define a list of examples of the format of old matter id's. So below are two examples.

JEE/CLIENT CODE/FILE NUMBER

JEE/1026/100

JEE/DEPT/UNIT/CLIENT CODE/FILE NUMBER/COUNTRY

JEE/IP/AFR/927/753/GHANA

2. Now that we have the 'structure' of the old case id we now need to change this into a format that the EDMS understands. This format is called regular expressions.

To change this into regular expressions you will need to do some research but the basic premise is straightforward. There are many online regex tutorials available to help you do this.

In our example I have provided the regular expression values below (in green).

JEE/CLIENT CODE/FILE NUMBER

JEE/1026/100

JEE\[[0-9]+\][\[[0-9]+\]

JEE/DEPT/UNIT/SUB UNIT/CLIENT CODE/FILE NUMBER/COUNTRY

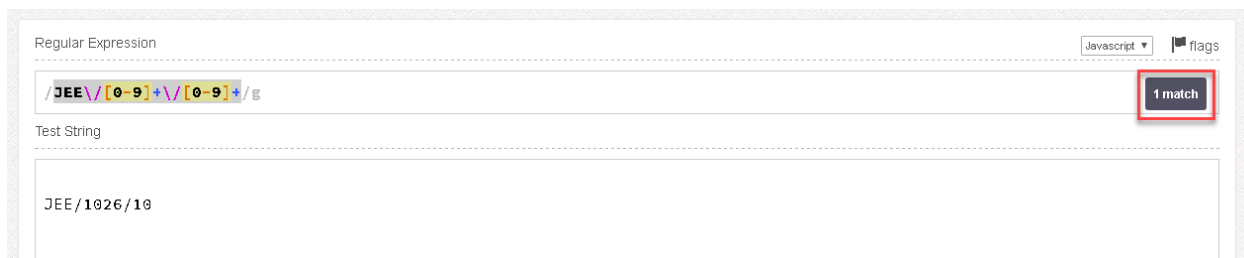
JEE/IP/AFR/PAT/1133/261/OAPI

JEE\[[A-Z]+\][\[[A-Z]+\][\[[A-Z]+\][\[[0-9]+\][\[[0-9]+\][\[[A-Z]+\]

3. Now that we have our regex values we need to test if they are working as they should. To do this go to a <http://www.regexpal.com>.

On this site you have an area for your regular expression and a test string where you place your old case id number. We want to see that these two do indeed match.

Do this for each of your old matter id's and test that they match!



- Now we need to add in an escape so that the SQL server can handle the \ character. In simple terms it simply means replacing all \ values with \\.

So my example will look as follows;

```
JEE\[0-9\]+\V\[0-9\]+
JEE\[A-Z\]+\V\[A-Z\]+\V\[A-Z\]+\V\[0-9\]+\V\[ 0-9\]+\V\[A-Z\]+
```

- We are now ready to incorporate that into our **old.case.id.reg.ex.conf** setting. Take a look again at the setting description.

We are looking for the following format.

```
{"version":1,"regExList":["(First Reg Ex value here) ","(Second Reg Ex value here)"]}
```

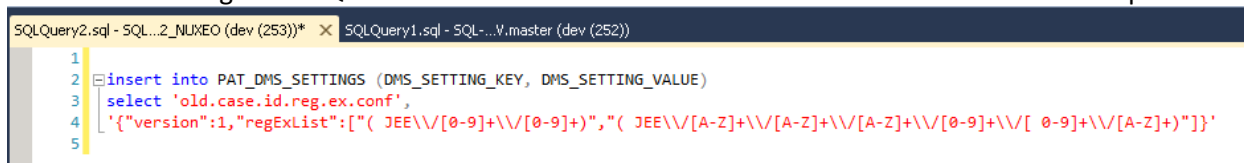
- So let's then add our own values.

```
{"version":1,"regExList":["( JEE\[0-9\]+\V\[0-9\]+) ","( JEE\[A-Z\]+\V\[A-Z\]+\V\[A-Z\]+\V\[0-9\]+\V\[ 0-9\]+\V\[A-Z\]+)"]}
```

- So far so good. Now we need to add the INSERT clause because we are going to be inserting this value into our PAT_DMS_SETTING table.

```
insert into PAT_DMS_SETTINGS (DMS_SETTING_KEY, DMS_SETTING_VALUE)
select 'old.case.id.reg.ex.conf',
'{"version":1,"regExList":["( JEE\[0-9\]+\V\[0-9\]+) ","( JEE\[A-Z\]+\V\[A-Z\]+\V\[A-Z\]+\V\[0-9\]+\V\[ 0-9\]+\V\[A-Z\]+)"]}'
```

- You then need to go into SQL SERVER MANAGEMENT STUDIO and then execute the above script.



- Your old case id formats are now contained in PAT_DMS_SETTINGS! Whenever an email arrives with the format set out it will be auto saved.

- There is one last step though. We need to restart the nuxeo / case browser container for this to take effect.

To do this, do the following;

- Open PUTTY.EXE
- Enter the host details and click OPEN
- Enter the USER NAME and PASSWORD in the command window that appears
- Type **docker restart nuxeo cb** to have those two containers restarted.
- This will take about 5 minutes.
- Your old case id's should then be taken into account when emails are auto-saved.