

Review Center Guide

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1 Creating a Review Center project

Review Center is a review management tool that helps you build custom queues, use AI to prioritize relevant documents, and leverage a rich reporting dashboard to understand the state of your data and track productivity. With streamlined administrative features and flexible AI algorithms, you can tailor the review process to your needs.

Some of Review Center's key features include:

- **Templatization** - set up best-practice structures ahead of time for easy re-use.
- **Customizable queues** - replace batch administration with queues based on saved searches.
- **Powerful AI classifier** - Review Center uses an all-new integrative learning classifier that provides even greater efficiency than previous AI classifiers.
- **Clear progress reporting** - a rich dashboard features timeline-based visualizations that show relevance rates and progress in the context of other project milestones.

1.0.1 Integrative learning classifier

The integrative learning classifier used by Review Center is a scalable, secure, and efficient classification service that can support a variety of use cases and documents. It makes connections among concepts and decisions to serve up relevant documents to reviewers as early as possible.

You do not need to create an Analytics index for Review Center queues. Instead, when you prepare or start an AI-driven queue, the classifier automatically runs in the background to manage documents.

Because the classifier is language-agnostic, you can use Review Center for documents written in any language.

1.1 Installing Review Center

Review Center is available as a secured application from the Application Library.

To install it:

1. Navigate to the **Relativity Applications** tab in your workspace.
2. Select **Install from application library**.
3. Select the **Review Center** application.
4. Click **Install**.

After installation completes, the following tabs will appear in your workspace:

- **Review Library** – create and manage queue templates.
- **Review Center** – create and manage queues and view the dashboard.
- **Review Queues** – review documents using queues.

For more information in installing applications, see Relativity Applications in the Admin guide.

1.2 Choosing a queue type

Review Center offers two types of review queues. Based on the needs of your project, you can set up review queues that either focus on custom-sorted sets of documents, or focus on documents that the AI classifier predicts as relevant.

1.2.1 Saved search queues

Saved search queues tie your queue to a saved search. You can use saved searches to group documents based on nearly any criteria, including documents from any existing Active Learning project or other Review Center queue. With this queue type, documents are served up to reviewers based on the sort method used for the saved search. If the saved search does not have a sort method selected, documents will be served up based on Artifact ID.

These queues also have the option of setting a relational field. If this is set, the whole relational group of documents present in the queue will be checked out to the same reviewer. This keeps families, email threads, or other relational groupings together in one queue.

When a relational field is set, it takes priority over the sort method. For example, if you sort by size and set the relational field to Family, then the family of the largest document will be checked out to the first reviewer, even if it contains small documents.

1.2.2 Prioritized review queues

Prioritized review queues are also based on a saved search, but instead of serving up documents based on their sort order, they use the AI classifier to serve up documents that it predicts as relevant. These relevance rankings are stored in the Rank Output field, and the ranks automatically update every time the queue refreshes.

The AI classifier uses the extracted text of documents to make its predictions. Even if other fields are returned in the saved search, it will not affect the results.

If you choose a prioritized review queue, you must code at least two non-empty documents in your data source before preparing or starting the queue: one with the positive choice on your review field, and one with the negative choice. This gives the AI classifier the information it needs to start making its predictions.

Note: The more documents are coded, the more accurate the classifier's predictions will be. We recommend starting with at least 10 positive-coded and 10 negative-coded documents when possible.

1.3 Setting up the reviewer group

To give reviewers access to a queue, set up a reviewer group. You can either create a brand new group, or modify the permissions for an existing user group.

To set up a reviewer group:

1. Decide which user group should contain the reviewers for the queue. For information on creating and editing groups, see Groups in the Admin guide.

Note: You cannot set the Workspace Admin Group as the reviewer group.

2. Add the group to the workspace.

3. Assign the reviewer group the following permissions:
 1. Object Security: **Document – View** and **Document – Edit**
 2. Object Security: **Review Center Queue – View**
 3. Tab Visibility: **Review Queues** tab
4. Add the reviewers to the group.

For more information about permissions, see [Review Center security permissions on page 18](#).

1.4 Creating required queue fields

Before creating a prioritized review queue, create the following fields:

- **Review field** – a single-choice field that serves as the coding field for your queue. This field should have at least one positive choice and one negative choice. Any other choices will be considered neutral.
- **Rank Output** – a decimal field that will hold the document ranks. Each prioritized review queue needs a separate Rank Output field on the Document object.

Note: You cannot use a reflected field as the Rank Output field.

If you are creating a saved search queue, you do not need a Rank Output field, and the review field is optional.

For more information about creating new fields, see Fields in the Admin guide.

1.5 Creating a queue template

Templates are unassigned queues that can be used as the basis for building other queues quickly. The **Is Template** field should always be toggled to **On** for templates.

The Review Center application comes with several premade queue templates to choose from. However, we recommend tailoring them or creating your own to best suit your needs. These can also be saved as part of your workspace template.

To create a queue template:

1. Navigate to the **Review Library** tab.
2. Click the **New Review Center Queue** button.
3. Enter the following information:
 1. **Name** - the queue name reviewers will see.
 2. **Is Template** - toggle this to **On**.
 3. **Template Description** - enter notes about the template such as its intended use, comments about field settings, etc.
 4. **Reviewer Group** - this is not recommended for templates.
 5. **Queue Type** - choose either **Saved Search** or **Prioritized Review**.

6. **Data Source** - select the saved search that contains the documents for your queue.
7. **Rank Output** (Prioritized Review only) - select the decimal field you created to hold the document rank scores.
8. **Review Field** - select the single choice field you created for review. This field must have two or more choices.
 1. **Positive Choice** - select the choice that represents the positive or responsive designation.
 2. **Negative Choice** - Select the choice that represents the negative or non-responsive designation.

Note: Any remaining choices are considered neutral.

9. **Relational Field** (Saved Search only) - select a relational field for grouping documents in the queue. This makes reviewers receive related documents together, such as members of the same document family.

Note: The relational field must be one of the fields returned by the Data Source saved search.

10. **Allow Coded in Review** (Saved Search only) - controls whether documents coded outside of the queue will still be served up in the queue.
 1. Toggle this **On** to allow outside-coded documents to be served up.
 2. Toggle this **Off** to exclude outside-coded documents. These are found and removed every time the queue refreshes.

Note: Prioritized review queues always exclude outside-coded documents from being served to reviewers, but the AI classifier still uses those documents to train its predictions.

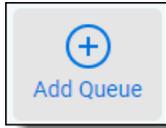
11. **Queue Display Options** - select which statistics you want reviewers to see on the queue card in the Review Queues tab.
12. **Queue Refresh** - controls whether the queue automatically refreshes every fifteen minutes. This refresh includes re-running the saved search and checking for outside-coded documents. For prioritized review queues, this also re-trains the classifier with the latest coding and re-ranks documents in order of predicted relevance.
 1. Toggle this **On** to refresh the queue automatically.
 2. Toggle this **Off** to prevent automatic refreshes. You will still be able to manually trigger refreshes using the Prepare Queue button on the dashboard.
13. **Email Notification Recipients** - enter email addresses to receive notifications about the queue status. These emails tell users when a manually-triggered queue preparation completes, a queue is empty, or a queue encounters an error while populating. To enter multiple email addresses, separate them with a semicolon. Do not include a space.

4. Click **Save**.

The template now appears in the Review Library list.

1.6 Creating a new queue from a template

To create a new queue using a queue template, use the **Add Queue** button on the Review Center dashboard.



To create a new queue from template using the dashboard:

1. Navigate to the **Review Center** tab.
2. Click the **Add Queue** button.
3. Select the template you want to use, then click **Next**.
4. Choose or modify the **Reviewer Group**.
5. In the other fields, check the default values filled in by the template. Change any values that should be different for this queue.
6. Click **Save**.

The new queue appears as a tab in the banner at the top of the dashboard.

All queue settings can also be edited after creating the queue.

Note: After a queue has been created from a template, the two of them are no longer connected. You can edit the template without affecting the queue.

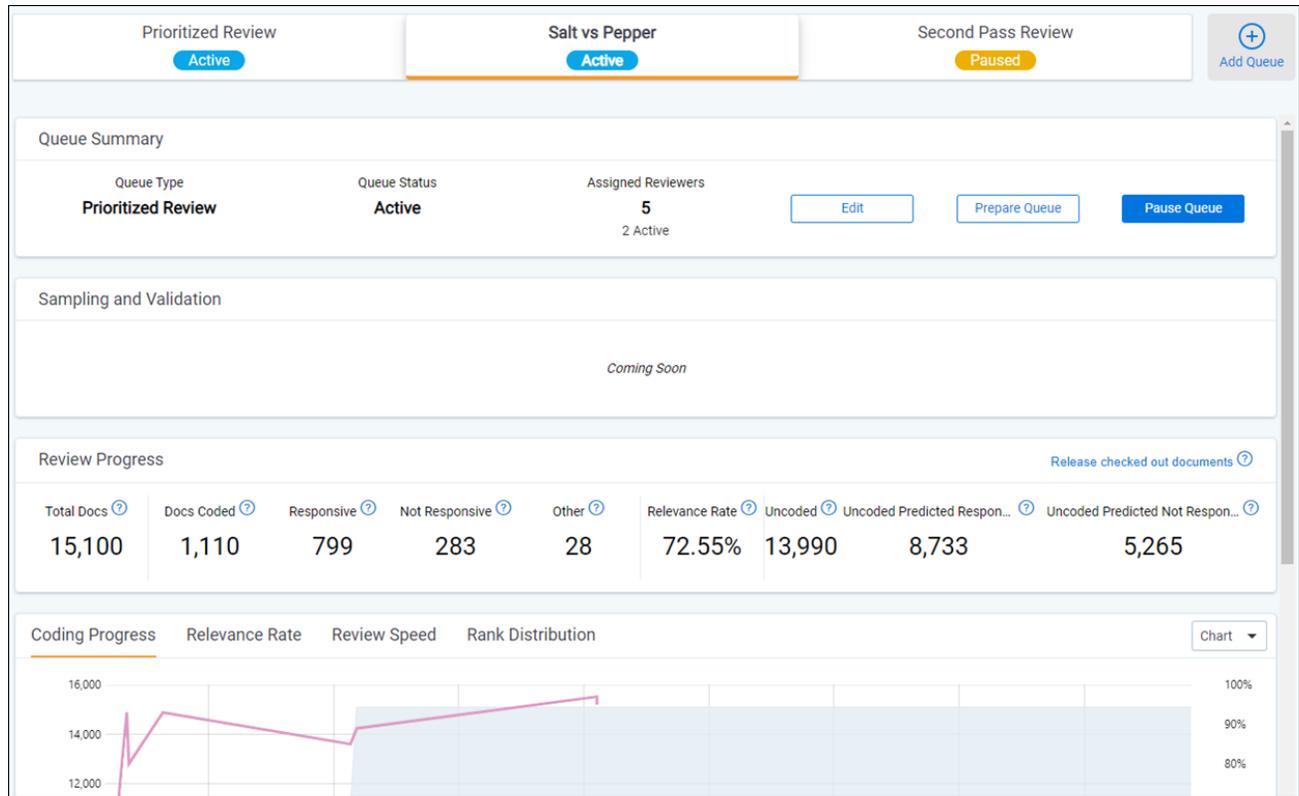
For information on starting, managing, and deleting queues, see [Monitoring a Review Center project on the next page](#).

2 Monitoring a Review Center project

The Review Center dashboard provides a centralized location to track, manage, and edit all Review Center queues. In addition, you can track reviewer coding decisions through a variety of methods.

2.1 Review Center dashboard

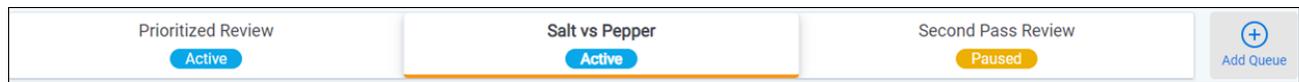
After creating a queue, navigate to the **Review Center** tab. This tab contains a dashboard showing all queues, their statistics, and controls related to queue progress.



The Review Center dashboard contains the following sections.

2.1.1 Queue tab strip

The queue tab strip contains a tab for each queue that has been created. To make the dashboard show details for a queue, click on its name in the tab strip.



Below the queue name, each queue shows its general status. The possible statuses are:

- **Pending**—the queue has not been prepared or started.
- **Preparing**—the admin has clicked Prepare Queue, and the queue is refreshing the saved search. If it is a prioritized review queue, this also retrains the classifier.
- **Prepared**—the queue has finished preparing, but it has not been started. It may or may not have a reviewer group assigned.
- **Starting**—the admin has clicked Start Queue, and the queue is actively starting. During this phase, the queue also refreshes the saved search and retrains the classifier if needed.
- **Active**—the queue has started and reviewers can start reviewing.
- **Paused**—the admin has paused the queue.
- **Canceling**—the admin has canceled the Prepare Queue or Start Queue process.
- **Errored**—an error occurred. When this happens, the error details will appear in a banner at the top of the dashboard.

At the right of the strip, the Add Queue button lets you quickly create new queues. For instructions, see [Creating a new queue from a template on page 8](#).

2.1.2 Queue Summary section

The Queue Summary section shows the Queue Type, detailed status, and how many reviewers are in the permissions group assigned to the queue. The "<X> Active" statistic under Assigned Reviewers shows how many reviewers currently have documents checked out to them.

| Queue Summary | | | | |
|--------------------|--------------|--------------------|----------------------|---|
| Queue Type | Queue Status | Assigned Reviewers | | |
| Prioritized Review | Active | 5 2 Active | Edit | Prepare Queue Pause Queue |

Most of the detailed queue statuses match the general statuses shown in the queue tab strip. However, you may also see these:

- **No Group Assigned**—no reviewer group has been assigned to the queue. This may appear when the queue is Pending, Prepared, or Paused.
- **Not Started**—the queue has been created and a group is assigned, but it has not been prepared or started. This appears when the queue is Pending.
- **Ready, Not Started**—the queue has finished preparing and a group is assigned, but it has not been started. This appears when the queue is Prepared.

The following actions are available:

- **Edit**—this opens a modal to edit any of the queue settings. For field descriptions, see [Creating a Review Center project on page 4](#).
- **Prepare Queue**—this manually refreshes the queue and populates the Review Progress statistics. It re-runs the saved search, retrains the AI classifier for prioritized review queues, and checks for documents in the saved search that have been coded outside the queue. If the queue is set to exclude outside-coded documents, it removes them.
 - If your data source is very large, or if you have a complicated saved search, you can prepare the queue ahead of time. This gives time for the saved search and classifier to run.

- After you click the button, the text will change to **Cancel Prepare Queue**. This cancels the queue refresh.
- **Start**—this makes the queue available for review and refreshes it if needed.
 - You must have a reviewer group assigned in order to start the queue.
 - After you click the button, the text will change to **Cancel Start Queue**. This stops the queue from starting and cancels the queue refresh.
 - After the queue has finished starting, the text will change to **Pause Queue**. This pauses the queue and stops reviewers from checking out more documents.

Note: If you are running a prioritized review queue, you must code at least two non-empty documents in your data source before preparing or starting the queue: one with the positive choice on your review field, and one with the negative choice. This gives the AI classifier the information it needs to start making its predictions.

2.1.2.1 Auto-refreshing the queue

If Queue Refresh is set to **On** in the queue settings, a queue with active reviewers will automatically refresh every 15 minutes. You can change this setting at any time.

While the queue is auto-refreshing, the Prepare Queue button will change to Cancel Prepare Queue. If you cancel the current auto-refresh, the queue will still try to auto-refresh again after 15 minutes have passed.

If you need to trigger an immediate refresh, you can still press the Prepare Queue button even if auto-refresh is on. For example, if new documents have been added to the saved search, you can press Prepare Queue to add them to the queue quickly instead of waiting until the next auto-refresh.

2.1.3 Review Progress section

The Review Progress section shows statistics for the current queue's progress.

| Review Progress Release checked out documents ? | | | | | | | | | |
|--|--------------|--------------|------------------|---------|------------------|-----------|-------------------------------|-----------------------------------|--|
| Total Docs ? | Docs Coded ? | Responsive ? | Not Responsive ? | Other ? | Relevance Rate ? | Uncoded ? | Uncoded Predicted Respon... ? | Uncoded Predicted Not Respon... ? | |
| 15,100 | 1,110 | 799 | 283 | 28 | 72.55% | 13,990 | 8,733 | 5,265 | |

The statistics are:

- **Total Docs**—the total number of documents in the data source that are ready for review.
- **Docs Coded**—the number of documents in the data source that either have a value in the review field, or have been skipped. This includes documents coded outside the queue.
- **<Positive Choice>**—the number of documents coded with the positive choice on the review field.
- **<Negative Choice>**—the number of documents coded with the negative choice on the review field.
- **Other**—the number of documents either skipped or coded with a neutral choice on the review field.
- **Relevance Rate**—the percentage of documents coded positive by the reviewer in the queue. The relevance rate is calculated by counting the number of documents coded positive, then dividing it by the total number of coded, non-skipped documents.

- **Uncoded**—the number of documents in the data source with no value in the review field. This includes documents that were skipped or had their coding decision removed.
- **Uncoded Predicted <Positive Choice>** (Prioritized Review only)—the number of documents in the data source with no review field value and a relevance rank greater than or equal to 50.00.
- **Uncoded Predicted <Negative Choice>** (Prioritized Review only)—the number of documents in the data source with no review field value and a relevance rank less than 50.00.

2.1.3.1 Release checked out documents

At the top right of the Review Progress section, there is a link labeled **Release checked out documents**. Clicking this link releases all documents that are checked out by reviewers.

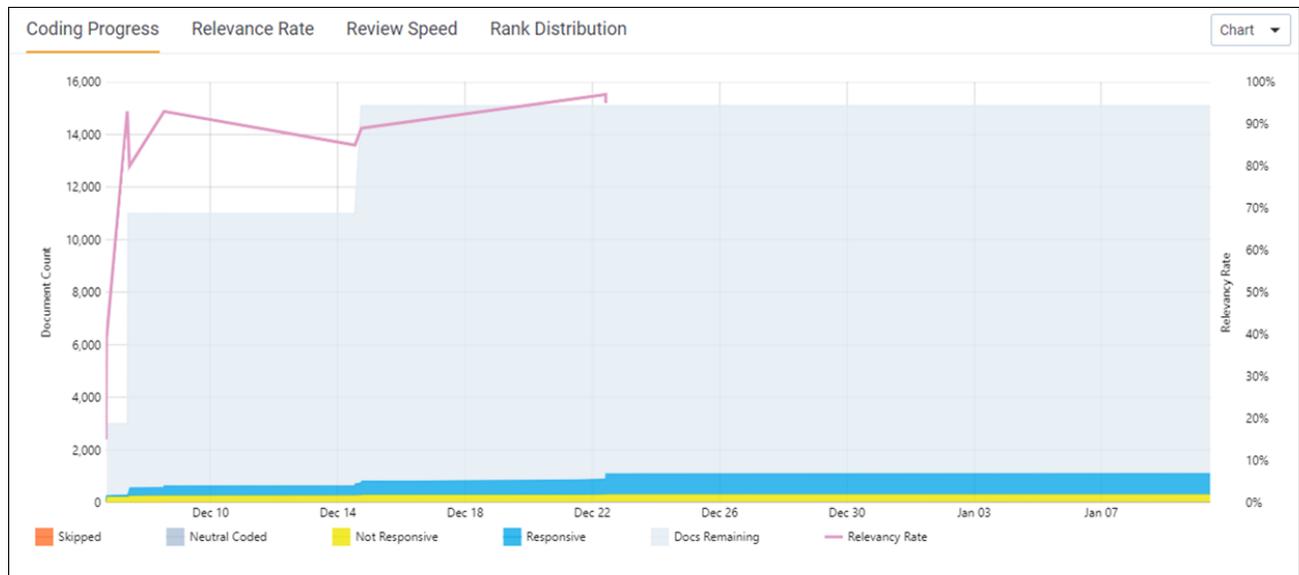


If a reviewer falls inactive and does not review the last few documents in a queue, you can use this button to free up those documents and reassign them to other reviewers. To prevent reviewers from receiving the same documents, we recommend clicking this when no reviewers are actively coding in a queue.

Note: If you click **Release checked out documents** while a reviewer is actively reviewing, that person will be able to finish coding, but his or her documents may get checked out by another reviewer at the same time. To prevent this, ask any active reviewers to exit and re-enter the queue after you click the link.

2.1.4 Charts and visualizations

The dashboard includes two visualization panels. Both panels have the same options for charts and tables to show, which lets you choose which visualization to show on which panel, in any order.



2.1.4.1 General charts

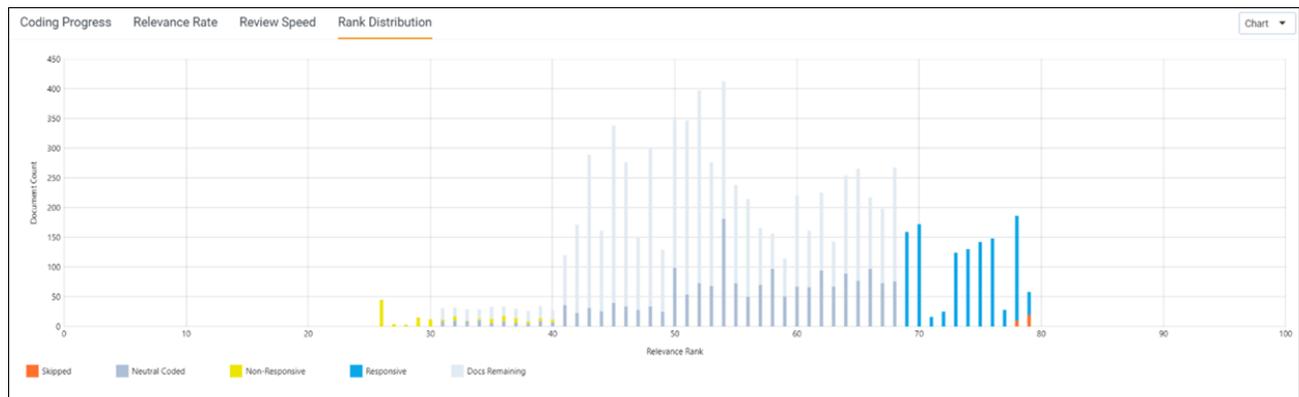
Some charts are available for any type of queue. These charts include:

- **Coding Progress** – shows the count of documents that have been coded over time. Data is reported in 15-minute increments.
- **Relevance Rate** – shows the relevance rate over time. This can be shown overall or by user.
 - Data is reported in 100-document increments.
 - For prioritized review queues, the relevancy rate usually declines over time. However, the relevance rate may spike if lots of new documents are added to the project or if the definition of relevance changes during review.
 - For saved search queues, the shape of the relevancy rate graph varies depending on the saved search being used.
- **Review Speed** – shows the number of documents coded per hour. This can be shown overall or by user.
 - Data is reported in 15-minute increments.
 - The “All Reviewers” line chart shows a weighted average of the review speeds of the reviewers. It does not report their aggregate review speed.

2.1.4.2 Prioritized review charts

The **Rank Distribution** chart is available for prioritized review queues. This chart helps you compare the model's predictions to reviewer's actual coding decisions. It shows the number of documents at each rank, from 0 to 100, color-coded by the reviewers' coding decisions on those documents.

A low relevance rank means that the model predicts that the document is more likely to be coded negative, and a high relevance rank means that the model predicts the document is more likely to be coded positive.



2.2 Deleting a queue

Queues can be edited or deleted from the Review Library tab.

To delete a queue:

1. Navigate to the **Review Library** tab.
2. Click on the queue you want to delete.
3. Click **Delete**.

A confirmation pop-up will appear.

4. Click **Delete** again.

After the process completes, you will return to the main Review Library tab.

Deleting a queue does not remove any of the coding decisions or rank values that have been assigned to the documents.

2.3 Understanding document ranks

During prioritized review, the AI classifier assigns a rank to each document. These ranks are stored in the Rank Output field, and they determine the order in which reviewers will see documents.

Most document ranks range from 0 to 100. The higher the score, the stronger the prediction that the document will be coded on the positive choice. The AI classifier recalculates ranks every time the queue refreshes, and the highest-ranking documents are served up to reviewers.

If the classifier cannot classify a document, it will assign the document a value below zero. These values are:

| Negative rank | Document error |
|---------------|--|
| -1 | An error occurred while processing the data through the classifier. |
| -2 | The extracted text field is empty. If you see this rank, consider making a saved search queue to review these documents separately. |
| -3 | The document's extracted text field is larger than the limit of 600KB. If you see this rank, we recommend filtering out large documents from your saved search to improve the performance of the classifier. |

2.4 Tracking reviewer decisions

You can view coding decisions made by each reviewer using the following methods.

2.4.1 Using the Field Tree

The Field Tree helps you get a quick overview of document coding decisions. It does not show which reviewer made each decision.

To view coding decisions using the Field Tree:

1. Navigate to the **Documents** tab.
2. In the browser panel, click on the tag symbol to open the Field Tree.
3. Scroll to the folder labeled **Review Center** and expand it.
4. Click on your queue.
5. Click on the **Reviewed** tag to view coded documents or the **Skipped** tag to view skipped documents.

2.4.2 Using the Track Document Field Edits by Reviewer application

The Track Document Field Edits by Reviewer application lets you see which reviewer made each coding decision. You can set up the application individually for each of your queues.

Install the application using the instructions from [Track document field edits by reviewer](#) on the RelativityOne documentation site.

When configuring the application:

1. Put your **Reviewed On** and **Reviewed By** fields into a saved search or view for monitoring.
2. Set your queue's review field as the **Field to Monitor**.

If you set up the application after starting your queue, you can still see previous coding decisions by following the steps under Populating Historical Records.

2.5 Moving Review Center templates and queues

Review Center templates and queues are Relativity Dynamic Objects (RDOs), which typically can be moved across workspaces or instances with Relativity Integration Points and Relativity Desktop Client. However, because of the complexity of an active queue, we do not support moving active queues. Doing so could damage your Review Center environment.

We do support moving queue templates across workspaces or instances using Relativity Integration Points and Relativity Desktop Client. This process is safe for your environment.

3 Reviewing documents using Review Center

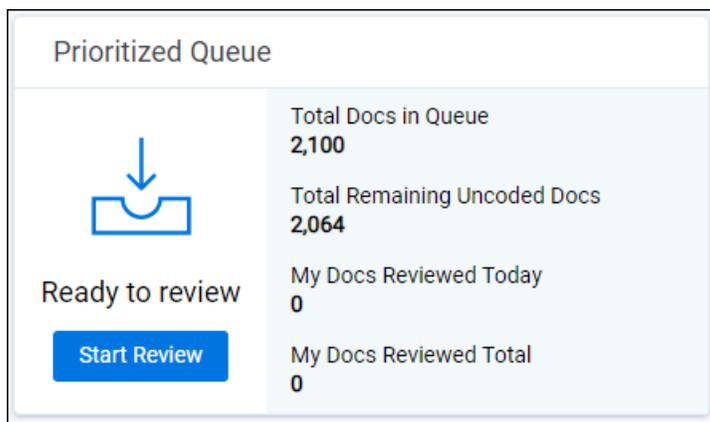
The Review Queues tab is the starting point for reviewers. Every Review Center queue that a reviewer is assigned to shows up here.

This topic provides step-by-step instructions for accessing a queue and reviewing documents.

3.1 Reviewing documents in the queue

To review documents in a queue:

1. Navigate to the **Review Queues** tab.
2. Each queue you are assigned to has a separate card. Locate the card with the same name as the queue you want.



3. Click **Start Review**.

This opens the document viewer.

4. Review the document as specified by your admin, then enter your coding choice.
5. Click **Save and Next**.

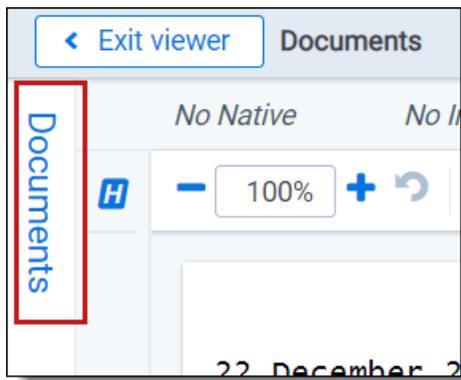
The next document will appear for review.

If you do not see a Start Review button, either the queue is paused, or the admin has not started the queue. Talk to your administrator to find out when the queue will be ready.

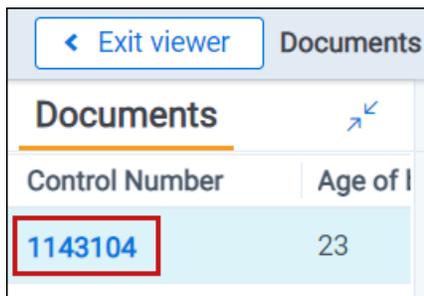
For more information on using the document viewer, see Viewer in the Admin guide.

3.2 Finding previously viewed documents

As you work through the queue, you can see documents you already reviewed in the queue by clicking on **Documents** in the left-hand navigation bar. This opens the Documents panel.



To view a document, click on its control number in the panel.



To return to your current document, click on the bottommost control number.

3.3 Queue card statistics

If your admin has enabled it, you may see some statistics displayed on the queue cards.

The statistics you may see are:

- **Total docs in queue**—the total number of documents in this queue, across all reviewers.
- **Total remaining uncoded docs**—the total number of uncoded documents in this queue, across all reviewers.
- **My docs reviewed total**—how many documents you have reviewed total in this queue.
- **My docs reviewed today**—how many documents you have reviewed today in this queue.

3.4 Viewing the dashboard

Your admin may give you access to the Review Center dashboard. The dashboard shows how the review is progressing, including statistics and visualizations.

For more information on the Review Center dashboard, see [Monitoring a Review Center project on page 9](#).

4 Review Center security permissions

This page contains information on the security permissions required for creating and interacting with the Review Center application.

4.1 Creating a Review Center template or queue

To create a Review Center template or queue, you need the following permissions:

| Object Security | Tab Visibility |
|---|--|
| <ul style="list-style-type: none">▪ Review Center Queue - View, Edit, Add▪ Workspace - Edit Security | <ul style="list-style-type: none">▪ Review Library▪ Review Center |

4.2 Editing and controlling Review Center queues

To edit an existing Review Center queue and use dashboard controls such as Prepare or Start, you need the following permissions:

| Object Security | Tab Visibility |
|--|---|
| <ul style="list-style-type: none">▪ Review Center Queue - View, Edit▪ Workspace - Edit Security | <ul style="list-style-type: none">▪ Review Center |

Note: The **Workspace** - Edit Security permission is only required to edit the assigned reviewer group.

4.3 Deleting a Review Center template or queue

To delete a Review Center template or queue, you need the following permissions:

| Object Security | Tab Visibility | Mass Operation |
|---|--|--|
| <ul style="list-style-type: none">▪ Review Center Queue - View, Edit, Delete | <ul style="list-style-type: none">▪ Review Library | <ul style="list-style-type: none">▪ Delete |

4.4 Viewing the Review Center dashboard

To view the Review Center dashboard, you need the following permissions:

| Object Security | Tab Visibility |
|---|---|
| <ul style="list-style-type: none">▪ Review Center Queue - View | <ul style="list-style-type: none">▪ Review Center |

4.5 Reviewer permissions

The reviewer group accessing a Review Center queue and coding documents must have the following permissions:

| Object Security | Tab Visibility |
|--|---|
| <ul style="list-style-type: none">▪ Document - View, Edit▪ Review Center Queue – View | <ul style="list-style-type: none">▪ Review Queues |

For more information on assigning a reviewer group to a queue, see:

- [Setting up the reviewer group on page 5](#)
- [Creating a new queue from a template on page 8](#)

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