Review Center - Admin quick reference guide

This guide provides step-by-step instructions for creating and administering a Review Center queue, with a checklist at the end. This guide is intended as a quick reference, and it does not explain the features in depth.

For more detailed instructions, see the Review Center section of the documentation site.

Choose a queue type

1. **Saved Search**—the queue serves up documents from a saved search, according to one of the following delivery methods:
    - **Batches**—the document set is divided into groups, then checked out to reviewers group by group.
    - **Linear**—documents are automatically checked out to reviewers a few at a time, according to the sort order of the saved search.
2. **Prioritized Review**—the queue uses artificial intelligence to predict which documents are most likely to be coded positive, and it serves those up first. To train the predictions, you need to code at least one positive and one negative document in the data set before starting the queue. Coding more documents leads to more accurate predictions.

All queues can be set to serve entire relational groups to the same reviewer.

Create the required fields and choices

- **Review Field**—a single-choice field that serves as the coding field for your queue. This field should have at least one positive choice (such as Responsive) and one negative choice (such as Not Responsive.) Any other choices will be considered neutral.
- **Rank Output** (prioritized review queue only)— a decimal field that will hold the document ranks. Each prioritized review queue needs a separate Rank Output field on the Document object.

Set up the reviewer permissions group

1. Decide which user group should contain the reviewers for the queue. You can either create a brand new group, or modify the permissions for an existing user group. You can assign multiple groups to the same queue.
2. Add the group to the workspace.
3. Assign the reviewer group these permissions:
    - Object Security: **Document - View** and **Document - Edit**
    - Object Security: **Review Center Queue - View**
    - Tab Visibility: **Review Queues** tab

Set up the layout

Create a coding layout that includes the queue's review field. Reviewers will use this layout to code documents in the queue. You can also add any other fields you want such as rank output, issue coding, privilege coding, a field to indicate further review needed or technical issues, and more.

Create the saved search

Create a saved search that contains the documents you want in the Review Center queue.

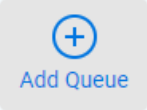
Note: For prioritized review queues, the AI classifier only uses the extracted text field to make its predictions. Returning other fields in the saved search does not affect the results.

Create a new queue

From the Review Center dashboard, you can create a new queue. You can also choose to create a queue template when you first create a queue. This makes it easier to re-use the same settings for future queues.

To create a new queue or queue template:

1. Navigate to the **Review Center** tab.
2. Click the **Add Queue** button.



3. Select a queue type, then click **Continue**.
4. Edit the queue settings. For a full list, see Review Center - Admin quick reference guide on the previous page on the Relativity documentation site.
    1. If you want to create a template out of your current settings, set the **Save as Template** field to **On**.
    2. If you want to use an existing template, choose one under **Select Template**.
5. Click **Create Queue**.
   The new queue appears as a tab in the banner at the top of the dashboard. If you also created a template, the template now appears in the Review Library list.

All queue settings can be edited after creating the queue.

Activate and manage the queue

From the Review Center dashboard, you can start, track, manage, and edit all Review Center queues.

To start your queue, follow these steps:

1. (Prioritized review queue only) Make sure at least one document in the data set is already coded positive, and at least one is coded negative. For even more efficient AI predictions, try having at least 10 positive-coded and 10 negative-coded documents.
2. Navigate to the **Review Center** tab.
3. If you have more than one queue, their names will be listed as tabs across the top. Click on the queue you want to start.
4. (Optional) Click **Prepare Only**. This re-runs the saved search for all queues and retrains the AI classifier for prioritized review queues. It does not start the queue.
5. Click **Start Review**. If you chose not to prepare the queue in advance, this will say Prepare and Start. After the queue has started, your reviewers can start reviewing.

After the queue has finished starting, a pause button will appear next to the words Active Queue. Clicking the button pauses the queue and stops reviewers from checking out more documents.

Update the queue and the classifier

If Queue Refresh is set to On, a queue with active reviewers will automatically re-run the saved search and update the classifier (for prioritized review queues) when there is coding activity in any queue. You can change this setting at any time.

If you need to trigger an immediate refresh, click on the words Auto Refresh to trigger an additional manual refresh. For example, if new documents have been added to the saved search, you can click this to add them to the queue quickly instead of waiting until the next auto-refresh. If Queue Refresh is turned off, this option will say Refresh Queue.

Review documents

1. Navigate to the **Review Queues** tab.
2. Each queue you are assigned to has a separate row. Locate the row with the same name as the queue you want.
3. For batched queues:
    1. Click the arrow beside a queue name to expand the list of batches underneath it.
    2. If there are unassigned batches, you can check them out to claim them. Click **Check Out** on the batch row.
4. Click **Start**. This button brings you into the document viewer where you can review documents.

As you review, you can click on **Documents** on the left-hand navigation. This opens the Documents panel.

- For linear queues, this shows you documents you already reviewed in the queue.
- For batched queues, this shows you the other documents in the batch.

Review Center queue checklist

Can be done in your workspace template:

☐ Create the review field.

☐ Create at least two choices for the coding field.

☐ For a prioritized review queue, create the rank output field. Each prioritized review queue needs its own rank output field.

☐ Set up a review layout that includes the review field.

☐ Create a saved search for documents you want in the queue.

Must be done in the workspace:

☐ Create the reviewer permissions group.

☐ Create a queue.

☐ For a prioritized review queue, code at least 1 non-empty document positive and 1 non-empty document negative. The more documents you code in advance, the better the starting predictions will be.

☐ (Optional) Prepare the queue in advance.

☐ Start the queue.

Proprietary Rights

This documentation ("**Documentation**") and the software to which it relates ("**Software**") belongs to Relativity ODA LLC and/or Relativity's third party software vendors. Relativity grants written license agreements which contain restrictions. All parties accessing the Documentation or Software must: respect proprietary rights of Relativity and third parties; comply with your organization's license agreement, including but not limited to license restrictions on use, copying, modifications, reverse engineering, and derivative products; and refrain from any misuse or misappropriation of this Documentation or Software in whole or in part. The Software and Documentation is protected by the **Copyright Act of 1976**, as amended, and the Software code is protected by the **Illinois Trade Secrets Act**. Violations can involve substantial civil liabilities, exemplary damages, and criminal penalties, including fines and possible imprisonment.

©2026. Relativity ODA LLC. All rights reserved. Relativity® is a registered trademark of Relativity ODA LLC.