

## Active Learning Quick Reference Guide

This guide provides step-by-step instructions for creating and administering an Active Learning project, with an Active Learning project checklist included at the end of the guide.

This guide is intended to focus on set-up and administration and does not explain the features in depth. It assumes that the Active Learning application is installed in the workspace.

The steps for setting up and administering an Active Learning projects are as follows:

### Create project review field and choices

- Create a single choice field.
- Create two choices for the field, one to represent the positive choice (e.g., Responsive), and one to represent the negative choice (e.g., Non-Responsive).
- Notes:
  - If the review team has coded documents prior to project creation, you can transfer the coding decisions to this field and use it to 'jump-start' the Active Learning project.

### Set up Reviewer Security Group

- Determine which group in the workspace will contain the users that will be given access to the Active Learning review queues.
- You can create a dedicated group or use an existing group.
- The group must be added to the workspace.
- The reviewer group must have a least View and Edit rights on the Document object, but no other Active Learning permissions are required.

### Set up a Layout

- Create a coding layout that includes the project review field.
- Reviewers will use this layout to code documents in the Active Learning review queues.
- You can add other fields to the layout if desired, such as issue coding or privilege coding fields, or an additional field to indicate such things as needs further, technical issue, etc.

### Create the Project Saved Search

- Create a saved search to define the set of documents for the Active Learning project.
- The search should return documents with an extracted text size greater than 0 and less than 30 MB.
- Ensure that the Extracted Text field is the only field returned.
- Notes:

- When loading data using Relativity Processing, you can map **Extracted Text Size in KB** so that the size value is automatically populated.
- If the extracted text size field is not populated, run the **Set Long Text Field Size** mass operation.

## Create the Classification Index

- Name the index and select Classification as the type.
- Set the searchable set to the saved search created above that returns the Active Learning project documents.
- Save the index.
- Click **Populate Index: Full**.
- To add or remove documents, update the searchable set saved search and run an incremental population/build.
- Notes:
  - A classification index can be used in only one active learning project.
  - The searchable set saved search defines the universe of documents included in the Active Learning project.

The screenshot shows the 'Index Information' configuration form. It contains the following fields and values:

- Name:** Analytics Classification Index
- Index Type:** Classification
- Searchable set:** Active Learning Project Documents (with a 'Clear' button)
- Email notification recipients:** (empty text area)

## Create the Active Learning Project

- Provide a project name.
- Select the classification index created above.
  - An index must be built and not currently in use in another project to be available for selection.
  - The searchable set saved search for the index defines the Active Learning project document universe.
- Select the project review field and the positive choice.
- If you plan to follow a standard Active Learning prioritized review workflow, ensure that **Suppress Duplicate Documents** is set to **No**.
- Set Reviewer Group to the group that includes the Active Learning reviewers.
- Save the project.

**Project Details**

Project Name:

Analytics Index (Classification):   Clear

Review Field:   Clear

Positive Choice:  Responsive  
 Non-Responsive

Suppress Duplicate Documents:  Yes  
 No

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**Reviewer Setup**

Reviewer Group:  ▼

## Activate Prioritized Review Queue

- On the Active Learning project home screen, click Add Reviewers on the Prioritized Review card.



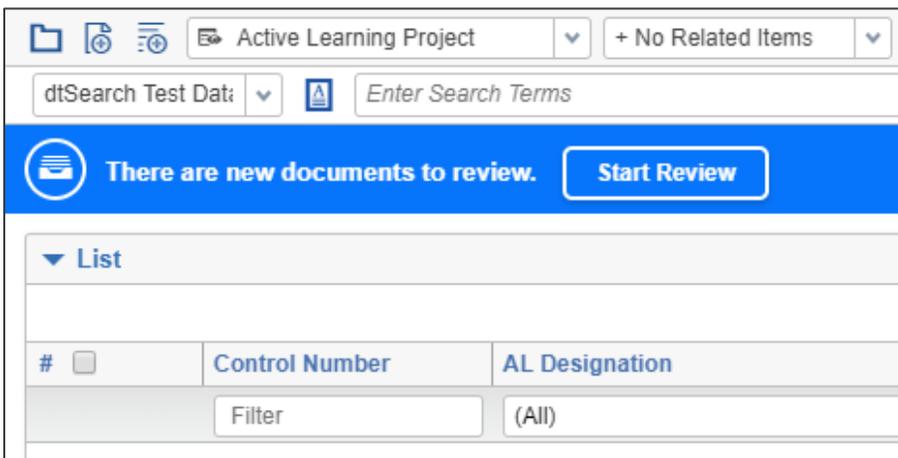
- Select the users that will have access to the prioritized review queue and click the green check mark to save.
  - If a user is later added to the group and needs to have access to the queue, repeat this step to add the user.



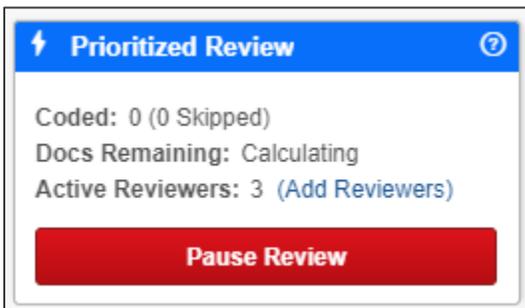
- Click the Start Review button to activate the prioritized review queue.



- Notify reviewers that the queue is active and available.
- Reviewers access the queue via the document view named after the Active Learning project and clicking the **Start Review** button.



- Click the Pause Review button to disable the prioritized review queue.



## Monitor Project, Update Ranks

- Monitor project progress by viewing the Document Rank Distribution chart and the Relevance Rate in the Prioritized Review Progress chart on the project home screen.
- To view, search, and sort on document rank score and document classification, run **Update Ranks**.
  - Enter a Responsive Cutoff score appropriate for your project to indicate the lowest rank score that will be classified as positive (Responsive).
  - Click **Update Ranks**.

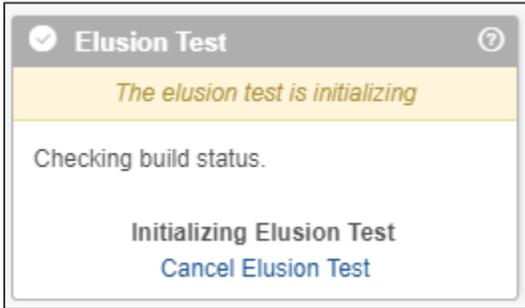
- The system updates the following Document fields for each document in the project:
  - **Categories - <Project Name> Cat. Set** - documents below the cutoff are given the negative choice category (Non-Responsive). Documents at or above the cutoff get the positive choice (Responsive).
  - **CSR- <Project Name> Cat. Set::Category Rank** - the rank score on a scale from 0 to 100.

## Perform Elusion Test

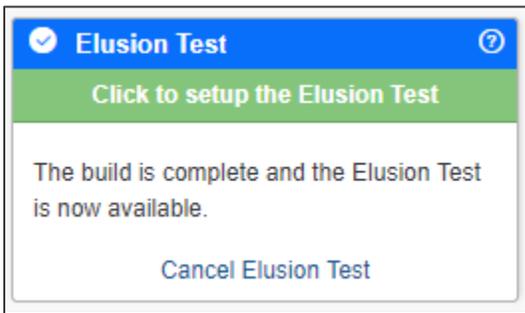
- To validate the accuracy of negatively classified (Non-Responsive) documents, run an Elusion Test.
- On the Elusion Test queue card on the project home screen, click Add Reviewers.

- Starting an Elusion Test turns off other queues. Click **Yes** to continue.

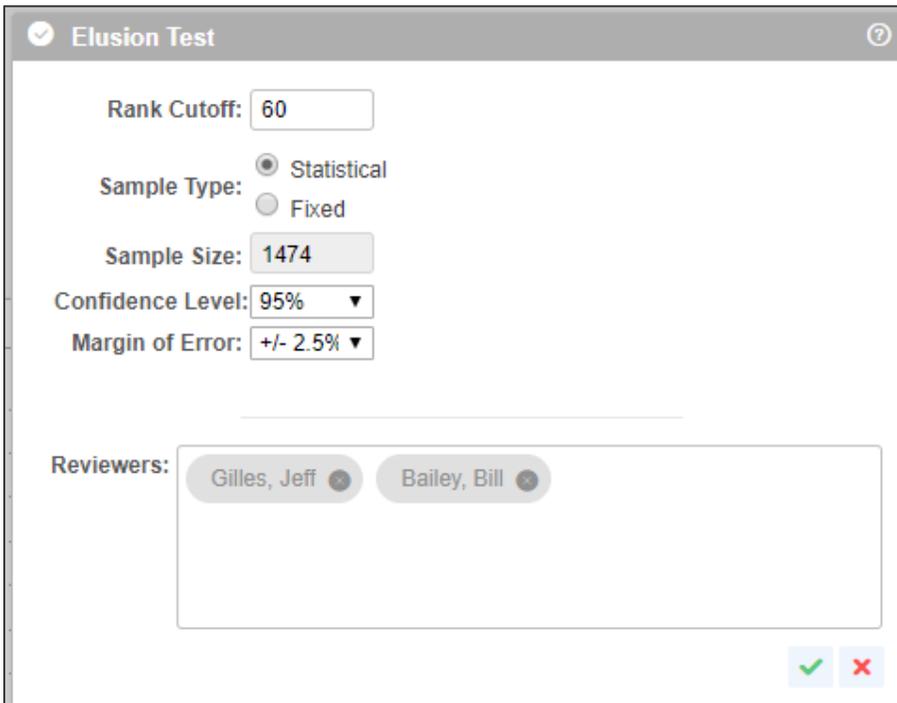
- The system will then initialize the Elusion Test queue.
  - Starting an Elusion Test disables all other active queues in the project and suspends model updates.



- After initialization, click the green bar on the queue card to set up the Elusion Test.



- Enter a Rank Cutoff score and set the parameters for the random sample that will be generated.
- Select the reviewers that will review documents in the Elusion Test review queue.
- Click the green check mark to accept the settings.



- Click **Start Review** to activate the Elusion Test review queue.



- Notify reviewers that they can code documents in the Elusion Test queue.
- When reviewers have coded all the documents in the Elusion Test sample, the system displays a notification in the Elusion Test review queue, and the Elusion Test results can be reviewed on the project home screen.

The screenshot shows the "Complete Elusion Test" dashboard. At the top, it displays three key metrics: Elusion Rate (0.0% - 11.7%) at 2.0%, Eluded Documents (0 - 876) at 149, and Pending Documents (Not included in the model) at 100. Below these metrics, it shows "Elusion Test Settings: Sample Size: 100, Confidence: 95.0%, Margin of Error: +/- 9.7%". The dashboard is divided into two main sections: "Accept Test Results" and "Resume Project".

**Accept Test Results**

The results of the Elusion Test are acceptable and the project can be considered complete. **The project can be re-enabled at any time.**

- Pause all review queues
- Mark project as complete
- Update document ranks upon completion

**Accept Results**

**Resume Project**

Additional review is required. The Elusion Test statistics will be invalidated and a new Elusion Test is required. **Elusion Test results are available in Review Statistics.**

- Submit all coding decisions to the model
- Enable all review queues

**Resume Project**

## Active Learning Project Checklist

- Create project review field
- Create two choices for review field
- Set up reviewer security group
- Set up review layout
- Create saved search for project documents
- Create a classification index
- Create the Active Learning project
- Set up and activate review queue
- After project underway, update ranks as needed
- After project stabilizes, perform elusion test to validate Non-Responsive classification