

How to: Use Review Batches and Code Documents in Relativity

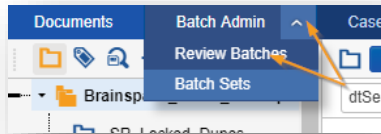
In this document we cover working with Review Batches or checking out a batch of documents for review and coding or tagging of the documents.

Review Batches

Batching is a way of distributing documents into small manageable sizes. Batches can be created by a case administrator or your Project Manager. In this document we will walk you through the process of checking out a batch and selecting the correct and matching document list view to display your un-reviewed documents. We will also cover checking the batch in once you have completed the review process.

CHECKING OUT A BATCH

1. After you have logged into Relativity locate at the top of your screen the menu item **Batch Admin** and **Review Batches** as shown below. In some cases, it may be under another menu item.



2. Once you have selected the menu **Review Batches** a new window will open displaying all batches you have access to in the case. The batches window, displays a few columns of information. In the image below, reading from left to right:

Batch Set, this is the top-level holder for all batches in that set.

Batch, a list of all numbered batches in a set.

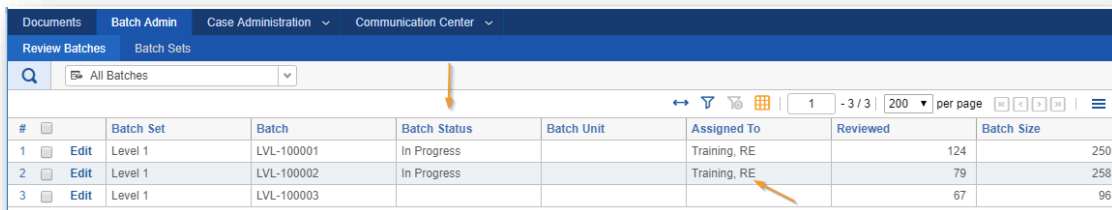
Batch Status, either Blank, Completed or In Progress, note only Blank batches should be checked out.

Batch Unit, is usually set to custodian but can be different depending on the batch set and workflow.

Assigned To, shows who currently has that batch checked out.

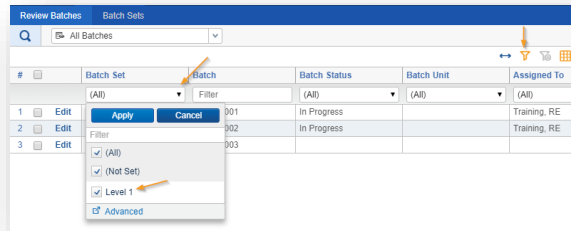
Reviewed, shows the number of documents that have been reviewed in the batch.

Batch Size, shows the total number of documents in that batch.

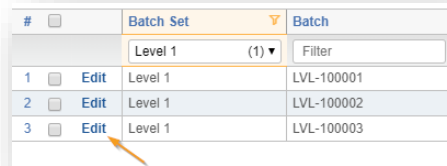


#	Batch Set	Batch	Batch Status	Batch Unit	Assigned To	Reviewed	Batch Size
1	Level 1	LVL-100001	In Progress		Training, RE	124	250
2	Level 1	LVL-100002	In Progress		Training, RE	79	258
3	Level 1	LVL-100003				67	96

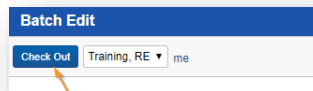
- Using the **Filter** icon on the far-right hand side of the screen as shown below makes it much easier to navigate the list of batches. Click the filter icon to open the filter bar and using the drop-down menu in the column **Batch Set** select the batch set **Level 1** as shown in the example below.



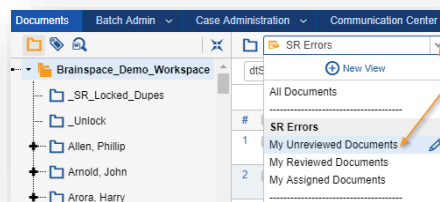
- Next find a batch that the status window is blank. This shows the batch is not assigned or checked out to another reviewer. To check out this batch, click the **Edit** button.



- This opens the **Batch Edit** or **Check Out** window. Depending on your permissions you may only see the option **Check Out**. If you have higher permissions, you will see a drop-down menu used to assign a batch another reviewer. Use the **me** button to select yourself and click **Check Out** to check out a batch.



- Once you have your batch checked out. Navigate back to the **Documents** tab and select the document list view that matches your review batch. Use the drop-down menu as shown below to select the list view. In this example we are selecting **My Unreviewed Documents**.

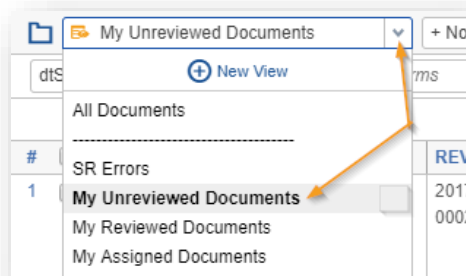


Document List Views

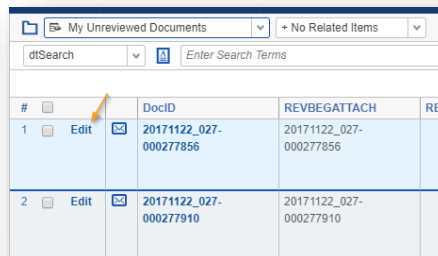
Relativity uses document list views to return documents that meet certain criteria. When working with Review batches normally you will work with these three document list views. Other views can be created that are targeted to the workflow you may be assigned. In most cases, if there are multiple workflows and different list views they should be named to match the batch set you checked out.

My Unreviewed Documents	Only displays documents that have been assigned to the reviewer and that have not been coded or tagged. This allows you to only see what is left in your batch of documents.
My Reviewed Documents	Only displays documents that have been assigned to the reviewer and that have been coded or tagged. Used to verify and spot check your work.
My Assigned Documents	Displays all documents that have been assigned to the reviewer reviewed or not. This view can be configured to only show documents that actively assigned, not checked in as Complete.

1. From the pull-down menu under the Document tab select the list view **My Unreviewed Documents** as shown below.



2. With the **My Unreviewed Documents** view selected click **edit** to open the first of your review batch documents as shown below.



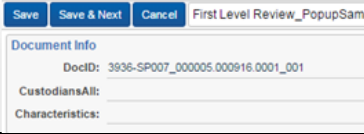
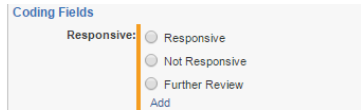

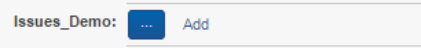
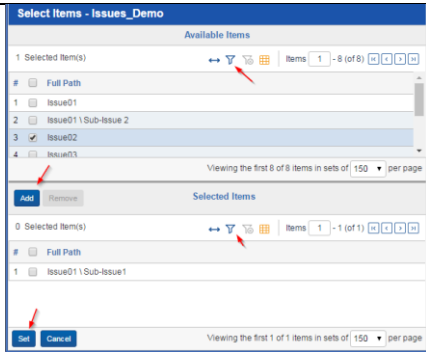

The next section walks through coding or tagging your documents. For instruction on how to **Check in a Batch** scroll below or [click here](#)

Coding Documents

In this section we will cover the basics of coding or tagging your documents. Follow these steps to select the correct Document List View, the first document and the correct coding form.

CODING FORMS

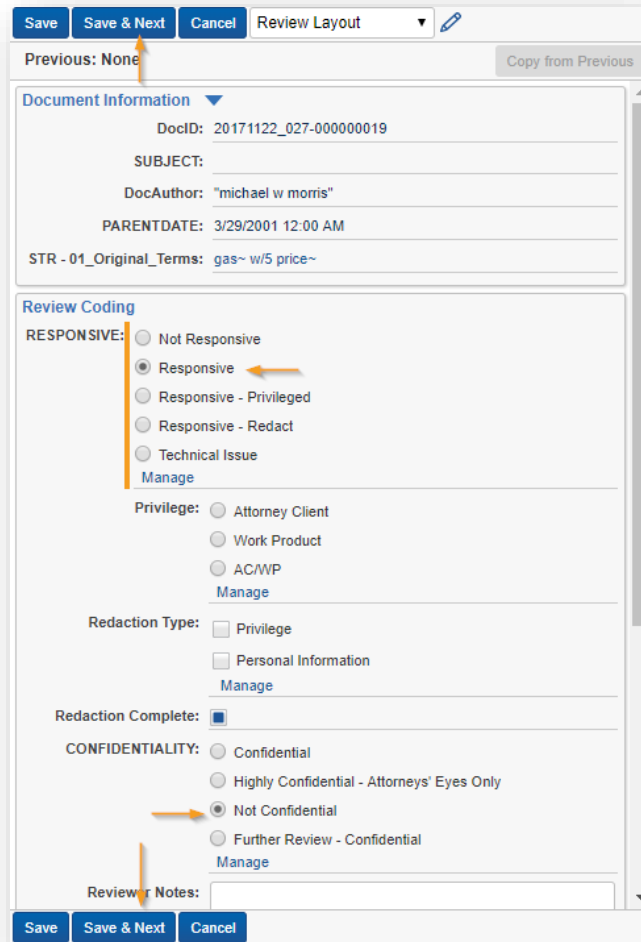
Relativity displays the coding fields for a layout or coding form in several ways. Below is a breakdown of some the different types of fields you may run into.

<p>Information fields: Information only or read only fields as in the Document info section of this image.</p>	
<p>Required fields: All required are displayed with an orange line between the field name and its choices. Single choice fields: A single choice field can be displayed in several formats the most common is Radio Buttons as shown here for Responsive.</p>	
<p>Other times they are displayed as a Drop-Down list as shown for Confidential.</p>	
<p>Multi Choice fields: As shown here with the Issues_Demo field, can be displayed as a list of choices or a pop-up picker. When a multi choice field is configured to use the pop-up picker the Ellipsis icon is displayed as shown image to the right.</p>	
<p>Popup Picker: Once the ellipsis icon is clicked, the pop-up picker menu is opened, as shown in the last image on the right. The menu is divided into two sections, a list of Available items and a list of Selected items. Select your choice(s) from the Available items and click the Add button to add it to Selected items. Filters can be used for long lists.</p>	
<p>Comments: Are displayed as a white box. The size of the box doesn't limit the amount of content that can be entered. In most cases these will be considered long text fields supporting over 255 characters.</p>	

Coding or tagging a Document

1. With you have selected the correct coding make your coding selections by clicking the name of the choice or the circle or square for that choice. In the example shown below we've clicked **Responsive** under the **Responsive** field.

- Once you have made all selections click the **Save & Next** button to save your choices and move to the next document. Clicking the **Save** button will save your coding choices close the coding form and leave you in the current document. These buttons are found at the top and bottom of the coding form or layout.
- In the example below there are a mixture of single-choice, multi-choice lists, and a **Yes/No** field for the **Redaction Complete** field. **Yes/No** fields are unset when shown as below with a **Blue Box** they are set to **Yes** when a **check mark** is displayed and **No** when the **choice is blank or white**.



Save Save & Next Cancel Review Layout

Previous: None Copy from Previous

Document Information

DocID: 20171122_027-00000019

SUBJECT:

DocAuthor: "michael w morris"

PARENTDATE: 3/29/2001 12:00 AM

STR - 01_Original_Terms: gas~ w/5 price~

Review Coding

RESPONSIVE: Not Responsive
 Responsive
 Responsive - Privileged
 Responsive - Redact
 Technical Issue
[Manage](#)

Privilege: Attorney Client
 Work Product
 AC/WP
[Manage](#)

Redaction Type: Privilege
 Personal Information
[Manage](#)

Redaction Complete:

CONFIDENTIALITY: Confidential
 Highly Confidential - Attorneys' Eyes Only
 Not Confidential
 Further Review - Confidential
[Manage](#)

Reviewer Notes:

Save Save & Next Cancel

SPECIAL OPTIONS

A variety of options can be added to a coding form. In some workflows, coding forms can be configured with the feature **Copy from Previous**. This feature is enabled for select coding forms and fields as shown below with Gray arrows. When this feature is added to a coding form, clicking the **Copy from Previous** button, after coding a document, will apply the coding choices from the previous document, for the select fields to the current document and displays a Green check mark for fields that have been affected. In this example the fields **Responsive** and **Privileged** are enabled to use this feature.

The screenshot shows a software interface for document review. At the top, there are buttons for 'Save', 'Save & Next', and 'Cancel', along with a dropdown menu set to 'First Level Review'. Below this, a 'Previous' document ID is shown as '20160310_015-000000004', with a 'Copy from Previous' button. The 'Document Info' section contains fields for 'DocID: 20160310_015-000000005', 'CustodiansAll: Arnold, John;', and 'Characteristics: Has Attachments;'. The 'Coding Fields' section has three main categories: 'Responsive' with options 'Responsive', 'Not Responsive', and 'Further Review'; 'Privilege' with options 'Not Privileged', 'Privileged - Withhold', 'Privileged - Redact', and 'Further Review - Privilege'; and 'Confidential' with the option 'Confidential'. Red arrows point to the expand/collapse icons for the 'Responsive' and 'Privilege' sections.

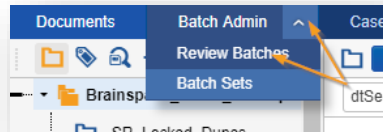
Rules can be added to a coding form to ensure coding consistency. In the example below a rule has been added that states: If the Privileged field is tagged with **Privileged – Withhold**, then the reviewer must select a choice from the **Confidential** field. If your coding form includes such rules and you have selected a choice that violates that rule, a warning is displayed as shown below. Correct the coding error and continue coding using **Save** or **Save & Next**.

This screenshot shows the same interface as above, but with an error message displayed. The message reads: 'Please correct the following error: • If the Privilege field is tagged "Privileged - Withhold", then the Confidential field is required.' A red arrow points to this message. In the 'Coding Fields' section, the 'Responsive' field is set to 'Responsive' (indicated by a green checkmark), and the 'Privilege' field is set to 'Privileged - Withhold' (indicated by a red arrow). The 'Confidential' field is currently empty, with a red arrow pointing to it. The 'Confidential' options are 'Confidential', 'Highly Confidential - Attorneys' Eyes Only', 'Not Confidential', and 'Further Review - Confidential'. The 'Save' and 'Save & Next' buttons are visible at the top.

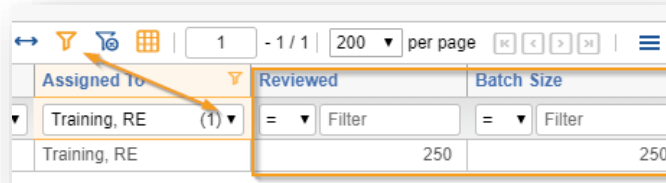
Checking in a Batch

Once you have reviewed all the documents in your batch. Follow these steps to check your batch back in as completed.

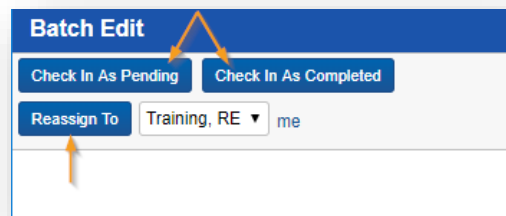
1. Navigate to **Batch Admin** and **Review Batches** at the top of your screen.



2. Using the **Filter** icon shown below, on the far-right hand side of the screen to open the filter bar. Either filter on the **Batch** or the **Assigned To** column. In this example we are filtering on the column **Assigned to** and selecting our reviewer name. Always verify that the number of documents shown under **Reviewed** matches the **Batch Size** as shown below.



3. Next click the same **Edit** link as you did when checking out the batch. The new popup window will display the following options, depending on your permission level. If you have completed your batch, select the option **Check in As Completed**. If you have been instructed to check in your batch so someone else can completed it, use **Check in As Pending**. If you are a case administrator and need to reassign a batch, select the reviewer from the drop down and click **Reassign to**.



We hope this information is helpful. For additional assistance please feel free to contact your Lighthouse team.