

## Coding the First Item in a Family Group by Using the Skip Function

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### Introduction

When a document in a family group is marked as responsive, the rest of the group will typically be grouped as responsive. If the other family items are going to a second pass team for review, we can quickly prioritize which groups can be sent to the second pass team to determine privilege and importance.

### Recipe Overview

This recipe will show you how to use a saved search, a view, and the document **Skip** function to determine the next document available for review. By determining whether at least one item in a family has been coded as responsive, we can remove any other family items from the review queue based on that one coding decision, which is not propagated to the family group.

### Requirements

Applicable to all versions of Relativity

### Directions

1. Create a new saved search and name it “**Responsiveness is Responsive and Family.**”
2. Choose the following search information and conditions:
  - a. Set **Includes** to **Include Family**.
  - b. Set **Scope** to **Entire Workspace**.
  - c. Set **Field** to **Responsiveness**, **Operator** to **any of these**, and **Value** to **Responsive**.

The screenshot displays a search configuration window with the following sections:

- Information:**
  - Name:** Responsiveness is Responsive and Family
  - Includes:** Include Family (dropdown menu)
  - Scope:**  Entire Workspace  Selected Folders  
[Select Folders](#) - Currently searching entire workspace.
  - Requires Manual Rerun:**
- + Search Conditions:** (collapsed)
- Conditions:**

|   | Field          | Operator     | Value      |
|---|----------------|--------------|------------|
| ▼ | Responsiveness | any of these | Responsive |

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3. Create a new view.
  - a. Name the view.
  - b. Give the view any order number.
  - c. Set **Available in Object Tab** to **Yes**.
  - d. Set **Object Type** to **Document**.
  - e. Include the fields to display.
4. Choose the following conditions:
  - a. For the first condition, set **Field** to **Responsiveness** and **Operator** to **is not set**.
  - b. Select **AND**.
  - c. For the second condition, set **Field** to **(Saved Search)**, **Operator** to **Document is not in**, and **Value** to **Responsiveness is Responsive and family**.

**Settings**

Name:

Order:

Available In Object Tab:

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**Set Conditions** [Add Condition](#)

|   | Field          | Operator | Value              |   |     |                       |
|---|----------------|----------|--------------------|---|-----|-----------------------|
| ▼ | Responsiveness | ▼        | is not set         | ▼ | AND | <a href="#">Clear</a> |
| ▼ | (Saved Search) | ▼        | Document is not in | ▼ | ▼   | <a href="#">Clear</a> |

5. Use the **Skip** function with this view. After the first item in a family group is coded, even without propagation set, the rest of the family group will be removed from the review set without being coded. This way each document can be coded manually, without the need for a first level review.

### References

Relativity – Admin Manual

### Tags

- Saved Search
- Skip Function
- View