1 What is MaxBilling?

MaxBilling is an application that you can use to automate the Relativity billing process by setting up corresponding billing rates for various metrics and generating accurate and detailed reports with calculated costs. You can then download these reports as PDFs and Excels, as well as have them sent via email at specific schedules.

**Benefits:** MaxBilling minimizes time, efforts and the possibility of human errors.

2 Installation and Agents

To install MaxBilling as a Relativity administrator:

1. Select a placeholder/admin workspace and then install the provided .RAP file.

**Note 1:** You must install MaxBilling on one Relativity placeholder/admin workspace only for a Relativity instance.

**Note 2:** All MaxBilling agents get created automatically during installation.

For more information on the agents that ship with MaxBilling, see: MaxBilling Agents at page 26.

3 Creating a profile

The MaxBilling (MXB) profile is the placeholder for your pricing. Reports are generated according to your profile.

To create a new profile:

1. Click **New MXB Profile**. The MXB Profile opens.
2. Complete or modify the fields on the MXB Profile layout.
3. Click Save.
### 3.1. MXB Profile fields

- **Enabled**: Enable or disable the profile.

  *Note*: Reports are not generated and consistency check is not performed for profiles that are disabled.

- **Name**: The name you want to give the profile

- **Profile Type**: The type of your profile. Select from:
  - **All Clients**: Includes all Clients within the Workspace.
  - **Specific Clients**: Includes specific Clients chosen by you.

- **Description**: Additional information for this profile can be added *(optional)*

- **Client**: Select the Relativity client for this billing profile

- **Currency**: Select billing currency

- **Report Last Generated Date**: Date and time a report for this profile was last generated *(read-only)*
3.2. Create Pricing

After you save the MXB profile, you can add various pricings, such as All Workspaces For Client and Overlay/Overwrite for workspaces.

To create new pricing:
1. Click **New** on the Pricing layout. The pricing layout opens.

2. Enter the following fields:
   - **Name**: the name you want to give the pricing
   - **Pricing Type**: specify the pricing type. Select From:
- **All Workspaces For Client** – all of the client's workspaces are charged according to the rates and metrics specified in that pricing. If a client adds a new workspace, Relativity automatically adds this workspace to the All Workspaces For Client pricing.

Note: You can set only one All Workspaces For Client pricing type for a profile.

- **Specific Workspace** - set individual rates and metrics on a workspace-by-workspace basis.

When Specific Workspaces pricing type is selected, two more fields appear:

- **Overwrite Type**: Defines how the specified rates and metrics are considered against the ones which you set in All Workspaces For Client pricing. It is a single choice drop-down with the following options:
  - **Overlay** – updates and/or adds rates and metrics for the selected workspaces according to All Workspaces For Client pricing.
  - **Overwrite** – the selected workspaces are charged according to only to the rates and metrics specified in that pricing. Rates and Metrics set in All Workspaces For Client pricing are not considered.
Workspaces: Select the workspace(s) you want to apply the Workspace pricing type to

3.3 Add Pricing Items

For each included pricing, you can add different pricing items in the following categories: Case Rollup, Analytics, Processing, Reviewers Work, Users, Tasks. Two layouts are available for adding pricing – listed and tabbed. In Pricing Listed Items Layout all priceings are present in list. In Pricing Tabbed Items layout contains a separate tab for each category.

To add new pricing item to any of the categories:

1. Navigate to the tab for the category you want to apply pricing to.
2. Click New.
3. Complete the fields on the Item Card.

When you click **New**, a layout appears with corresponding fields:

- **Type**: Select the pricing type.
- **Unit**: Name for reference
  - **In Whole** - the item will be charged as a whole and will not be dependent on quantity. *(applicable for counts)*
  - **Count** - the item will be charged according to quantity *(applicable for counts)*
  - **GB** - the item will be charged according to usage in GB *(applicable for sizes)*
  - **MB** - the item will be charged according to usage in MB *(applicable for sizes)*
  - **KB** - the item will be charged according to usage in KB *(applicable for sizes)*
  - **Hour** - the item will be charged according to time spent in hours
  - **Minute** - the item will be charged according to time spent in minutes

*You may find detailed information about all pricing item types for each billing category in Appendix A*
• **User Charge – Logged in** – user will be charged only if they log in

• **User Charge – Had Access** - user will be charged only if they had their access enabled

**Billable**: Select whether the item to be considered as billable in the report *(optional)*

• **Checked** – item will be considered as billable in the report

• **Unchecked** – Unit Price and Discount fields will disappear and the item will be presented in the generated reports only with its usage

**Unit Price**: Set the single price for pricing unit *(required)*

**Discount %**: Set discount for the item *(optional)*

For *Users* and *Reviewers* items there is an additional field:

**Groups**: Select the group(s) for the item. All users that are members of the group(s) will be charged accordingly.

**Note 1**: You can select a group twice in *Users* category or for the same item in *Reviewers* category.

**Note 2**: One user can't be a member of more than one group in *Users* category or for the same item in *Reviewers* category.

4 **Report**

Each profile contains a Profile Console. Use the profile console to generate reports, or to view the history of previously generated reports for the profile you select.

To generate new report for a profile:

1. Click *Generate Report*.
2. Choose a *Report Type*.
- **Single multi-client report**: Generates a single Report for all the Clients in the Profile.
- **Multiple single-client reports**: Generates separate Single-client Reports for every Client included in the profile.

3. Enter the Start and End Dates for the report.
4. Click Save. The Report Queue view opens where you can monitor the process of the report.

All reports are listed in the Reports tab. In this tab, you can view general information about all reports. To view general information for a particular report, click the name of the report you want to view.
To generate a new report for a Profile:
1. Click **New MXB Report**.
2. Select a profile.
3. Choose a Report Type.
4. Enter the Start and End Dates for the report.
5. Click Save. The Report Queue view opens where you can monitor the process of the report.

When the generation process completes you will be able to see the report details. The following information is provided for each report type:

**Single multi-client report:**
Single-client report:
For more detailed information about workspace billing, click the name of the workspace. When you click the name of the workspace, generated billing for all categories displays.

Once you generate a report, in the Report Console, you can send the report via email and generate invoices based on the report. You can also generate a new report for the given profile.

Additionally, you can download an Excel version of the Multiple-clients Reports and both Excel and PDF versions of the Single-client Reports.

Single multi-client report:
Single-client report:

To download the detailed report in the available format:

1. Click *Download PDF*.
2. Click **Download Excel**.

### Report Information Sheet:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Report Information</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Billing Profile:</td>
<td>Billing Profile for ACME Corp.</td>
<td>Report Type:</td>
<td>Single Client</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Period Start Date:</td>
<td>27.3.2017 12:00</td>
<td>Currency:</td>
<td>USD $</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Period End Date:</td>
<td>27.4.2017 12:00</td>
<td>Subtotal:</td>
<td>200149.65</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Generated Date:</td>
<td>11.4.2017 1:12</td>
<td>Total Discount</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td>Grand Total:</td>
<td>200149.65</td>
<td></td>
</tr>
</tbody>
</table>

### Breakdown by Workspaces Sheet:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Client</td>
<td>Matter</td>
<td>Workspace Name</td>
<td>Workspace ID</td>
<td>Case Rollup</td>
<td>Analytics</td>
<td>Processing</td>
<td>Reviewers</td>
<td>Users</td>
<td>Tasks</td>
<td>Subtotal</td>
<td>Discount Amount</td>
<td>Total</td>
</tr>
<tr>
<td>2</td>
<td>ACME Corp.</td>
<td>Corporate Cases</td>
<td>ACME Corporation</td>
<td>1023882</td>
<td>200149.65</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>200149.65</td>
<td>0</td>
<td>200149.65</td>
</tr>
</tbody>
</table>

To send the report via email:
1. Click **Send via Email**.
2. Enter recipient's email(s).
3. Select Save and Back.

To generate a new report:
1. Click *Create New Report for Same Profile*.
2. Enter the Start and End Dates for the report.
3. Choose a Report Type (only for Multiple Client Reports).
4. Click Save. The Report Queue view opens where you can monitor the process of the report.

Single Client:

To generate an invoice for a report:
1. Navigate to the report you want to generate an invoice for.

Multiple Clients:
2. Click **Generate Invoice** in the Reports console.
3. Complete the following fields:
   - **Invoice Book**: Select the information about the company that issues the invoice. (*required*)
   - **Invoice Partner**: Select the information about the company to which the invoice is billed. (*required*)
   - **Payment Method**: Select the payment method. (*required*)
   - **Payment Term**: Select the payment term. (*required*)
   - **Default Tax**: Select the default tax – e.g. Federal, VAT, etc. (*required*)
   - **Additional Tax Rate 1**: Select second tax - e.g. City, State, etc. (*optional*)
   - **Additional Tax Rate 2**: Select third tax. (*optional*)

   *For all of the above fields you have the ability to select from an existing list of items of the corresponding type, or you can create a new one by clicking the Add link.*

4. Click **Save**. MaxBilling generates the invoice. You can then navigate to the Invoices tab to see a list of all generated invoices.
You can also download the invoice in PDF format using the Download PDF button in the Invoice console.

To download the invoice in PDF format:
1. Click **Download PDF**.
Once you generate an invoice, in the Invoice Console, you can download it in PDF format, send the invoice via email and send the invoice with its corresponding report via email.

To send the invoice via email:
1. Select **Send via Email**.
2. Enter recipient's email(s) and select Save and Back.
In the Invoices tab you can view more detailed information about an invoice by clicking the name of an invoice in the Invoices tab.

6  Scheduler

The Scheduler helps you automate the Report generation process by setting different type of Schedule.

To create a new MXB Schedule:

1. Navigate to the Schedules tab.
2. Select **New MXB Schedule**.
3. Complete the following fields:
• **Name:** The name of your Schedule. (required)

• **Billing Profile:** The Profile for which you want the Schedule to generate Reports. (required)

• **Report Type:** The type of the Reports that will be generated. (required)

• **Report Period:** The period for which you want the Reports to be generated. (required)
  - **Cyclic**
  - **Incremental**

• **Email Recipients:** The recipients to whom the reports will be sent. (optional)

• **Range:** The range for which the Scheduler will be working. (required)
  - **No End Date**
  - **Fixed Number of Occurrences**
  - **Fixed End Date**

• **Frequency:** The frequency of the Report generation. (required)
  - **Daily:** Reports generated every day.
  - **Weekly:** Reports generated on a fixed day of every week.
  - **Monthly:** Reports generated on a fixed day of every month.
  - **Yearly:** Reports generated on a fixed day of a month every year.

• **Pattern:** The pattern of the Report generation occurrence. This drop down is enabled if you choose weekly, monthly or yearly frequencies.
• **On Fixed Day of the Week:** Pattern for Weekly frequency.
• **On Fixed Day of the Month:** Pattern for Monthly & Yearly frequencies.
• **On a Fixed Date:** Pattern for Yearly frequency.

  - **Next Scheduled Run Time:** Shows the next run time of the Schedule. (read-only)
  - **Report Fixed Start Date:** The start day of the Report. This field is enabled if you choose an Incremental Report period.
  - **Occurrences:** The number of occurrences for the Schedule. This field is available if you choose the **Fixed Number of Occurrences** range.
  - **End Date:** The end day of the Schedule. This field is enabled if you choose the **Fixed End Date** range.
  - **Day:** In this field you set a day of the month for the Monthly and Yearly frequencies. It is enabled if you choose Monthly or Yearly frequency.
  - **Weekday:** In this field you set a day of the week for the Weekly frequency. It is enabled if you choose Weekly frequency.
  - **Month:** In this field you set a month of the year for the Yearly frequency. It is enabled if you choose Yearly frequency.

After you save your Schedule you will be able to view its details:

![Schedule Information](image)

You can additionally view all of your Schedules by navigating to the Schedules tab.
7 Settings

In the Settings tab, you can add Invoice Books, Invoice Partners, Tax Rates, Payment Methods, Payment Terms, and Currency. To add a new Invoice type, click New under each tab.

To create an Invoice Book populate the following fields:

- **Invoice Number Prefix**: Set a prefix for the invoice number (optional)
- **Last Invoice Number**: Set the last invoice number – if set to 0, the first invoice generated for this book will be with number 2, the next with number 3, etc. It is set only on initial creation of Invoice Book and cannot be edited after that. (required)
- **Company Name**: The name of the company. (required)
- **Employer/Tax ID**: Type the Employer/Tax ID. (required)
- **Site Name**: The name of company site. (required)
- **Street Address**: The street company is registered in. (required)
- **City/State/Zip**: The City/State/Zip company is registered in. (required)
- **Country**: The country. (required)
- **Sales Representative**: Name of the sales representative. (required)
- **Email**: Contact email. (optional)
- **Phone Number**: Contact phone number. (optional)
To create an Invoice Partner populate the following fields:

- **Company Name**: The name of the company. *(required)*
- **Employer/Tax ID**: Type the Employer/Tax ID. *(required)*
- **Site Name**: The name of company site. *(required)*
- **Street Address**: The street company is registered on. *(required)*
- **City/State/Zip**: The City/State/Zip company is registered in. *(required)*
- **Country**: The country. *(required)*
- **Sales Representative**: Name of the sales representative. *(required)*
- **Email**: Contact email. *(optional)*
- **Phone Number**: Contact phone number *(optional)*
To create a **Tax Rate** populate the following fields:

- **Name**: Name for reference.
- **Tax Rate %**: The percentage for this tax rate.
- **Description**: Additional information. *(optional)*

To create a **Payment Method** enter a name in the Name field.

To create a **Payment Term** populate the following fields:

- **Name**: Name for reference.
- **Calendar Days**: Set the period an invoice must be paid in calendar days.
- **Description**: Additional information. *(optional)*

To create a **Currency** populate the following fields:

- **Abbreviation**: Abbreviation of the currency.
- **Symbol**: The symbol of the currency. *(optional)*
- **Description**: Additional information. *(optional)*
8 MaxBilling Agents

MaxBilling ships with the following agents:

- **MaxBilling Daily Statistics Collector** – collects statistics for the dtSearch Index, Analytics Indexes, File and Item statistics on a daily basis
- **MaxBilling Admin Object Sync** – synchronizes Relativity Groups, Users, Clients, Workspaces with the corresponding MaxBilling objects
- **MaxBilling Profile Consistency Checker** – checks whether there are any inconsistencies in MaxBilling profiles and sets the Profile State and State Message accordingly
- **MaxBilling Report Generator** – generates MaxBilling Reports
- **MaxBilling Scheduler Agent** – checks if there are active Schedules and creates Report generation requests for them

**Note 1:** All MaxBilling agents are automatically created during installation on the first active Agent Server found.

**Note 2:** All MaxBilling agents must be enabled.

**Note 3:** You can have only one instance of each MaxBilling Agent Type created on Relativity instance.

9 Uninstalling MaxBilling

To uninstall **MaxBilling**:

1. Uninstall the **MaxBilling** Relativity application from the workspace.
2. Delete all of the **MaxBilling** Agent Types.

10 kCura Disclaimer

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### Appendix A

#### Case Rollup Pricing Items Description:

<table>
<thead>
<tr>
<th>Metric Type</th>
<th>Description</th>
<th>Pricing Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>DtSearch Index Size</td>
<td>The peak* total DT Search Index size for all DT Search Indexes for the corresponding workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Image File Count</td>
<td>The peak* count of image files in the workspace.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Image File Size</td>
<td>The peak* size of image files in the workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Native File Count</td>
<td>The peak* count of native files in the workspace.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Native File Size</td>
<td>The peak* size of native files in the workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Production File Count</td>
<td>The peak* count of production files in the workspace.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Production File Size</td>
<td>The peak* size of production files in the workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Extracted Text Size</td>
<td>The peak* size of extracted text in the workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Total File Size</td>
<td>The peak* total file size of files in the workspace. This value only counts items in the file table and doesn't include container files in the repository.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Total File Count</td>
<td>The peak* count of the total number of files in the workspace.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>LDF Size</td>
<td>The peak* database log data file (LDF) size of the workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>MDF Size</td>
<td>The peak* database master data file (MDF) size of the workspace. <strong>Note:</strong> If your MDF is split into multiple NDFs, the sum of all NDF sizes is returned.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Available DB Size</td>
<td>The space available for the workspace database at the time the peak database size was captured.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Used DB Size</td>
<td>The peak* size of the workspace database.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Document Count</td>
<td>The total document count in the workspace.</td>
<td>Count, InWhole</td>
</tr>
</tbody>
</table>

*Peak values are based on a daily collection by Case Statistics and MaxBilling Daily Statistics agents.*

*Peak value is the maximum value of a given pricing item (for the specified time period).*
### Analytics Pricing Items Description:

<table>
<thead>
<tr>
<th>Metric Type</th>
<th>Description</th>
<th>Pricing Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA Non Native Documents Size</td>
<td>Peak* size of Non Native documents that were indexed with Content Analyst for first time, during the reported period.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>CA Index Size On Disc</td>
<td>Peak* total CA index size on disk for all CA indexes which exist in Relativity</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>CA Native Size</td>
<td>Peak* size of all Native documents indexed with Content Analyst for first time, during the reported period.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>CA Non Native Documents</td>
<td>Peak* number of Non Native documents that were indexed with Content Analyst for first time, during the reported period.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>CA Native Documents</td>
<td>Peak* number of Native documents that were indexed with Content Analyst for first time, during the reported period.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>CA Total Documents</td>
<td>Peak* total number of all documents run through a Content Analyst Index for the first time, during the reported period.</td>
<td>Count, InWhole</td>
</tr>
</tbody>
</table>

*Peak values are based on a daily collection by Case Statistics and MaxBilling Daily Statistics agents.*

**Peak value is the maximum value of a given pricing item (for the specified time period).**

### Processing Pricing Items Description:

<table>
<thead>
<tr>
<th>Metric Type</th>
<th>Description</th>
<th>Pricing Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Native File Count</td>
<td>The count of all native files (including duplicates and containers) as they exist after decompression and extraction.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>All Native File Size</td>
<td>The sum of all native file sizes (including duplicates and containers), as they exist after decompression and extraction.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Container count</td>
<td>The count of all native files classified as containers before extraction/decompression, as they exist in storage. This also includes nested containers that haven’t been extracted yet.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Container size</td>
<td>The sum of all native file sizes, classified as containers before extraction/decompression, as they exist in storage. This value may be larger than the preprocessed file size because it also includes nested containers.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Discovered document count</td>
<td>The count of all the native files discovered that aren’t classified as containers as they exist in storage</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Discovered document size</td>
<td>The sum of all native file sizes discovered, that aren't classified as containers as they exist in storage.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Discovered Files</td>
<td>The count of all discovered files.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Units</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Duplicate file count</td>
<td>The count of duplicate native files associated to the user, processing set and workspace.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Filtered file count</td>
<td>The count of all files excluded from discovery by way of an exclusion filter after inventory.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Filtered file size</td>
<td>The sum of all the file sizes, excluded from discovery by way of an exclusion filter after inventory.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Inventoried files</td>
<td>The count of all files found during an inventory run.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Nisted file count</td>
<td>The count of all files denisted out during discovery.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Nisted file size</td>
<td>The sum of all the file sizes, denisted out during discovery</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Preprocessed file count</td>
<td>The count of all native files before extraction/decompression, as they exist in storage.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Preprocessed file size</td>
<td>The sum of all the native file sizes, before extraction/decompression, as they exist in storage.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Published documents</td>
<td>The count of published native files associated to the user, processing set and workspace.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Published document size</td>
<td>The sum of published native file sizes, associated to the user, processing set and workspace.</td>
<td>GB, MB, KB</td>
</tr>
<tr>
<td>Storage file size</td>
<td>The sum of all file sizes, as they exist in storage after publishing. This is the total file size minus any files that were ingested twice. This value only counts the file once, ignoring duplicates.</td>
<td>GB, MB, KB</td>
</tr>
</tbody>
</table>
### Reviewers Work Pricing Items Description:

<table>
<thead>
<tr>
<th>Metric Type</th>
<th>Description</th>
<th>Pricing Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distinct Edits</td>
<td>The total number of documents edited, excluding repeated edits of the same document. The &quot;distinct&quot; classification is meant to account for duplicate actions performed against unique documents.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Distinct Edits Per Day</td>
<td>The number of unique edits performed per day over the period reported on.</td>
<td>Informational</td>
</tr>
<tr>
<td>Distinct Edits Per Hour</td>
<td>The number of distinct edits per hour based on the reviewer’s total usage time.</td>
<td>Informational</td>
</tr>
<tr>
<td>Distinct Mass Edits</td>
<td>The total number of unique document edits using the Mass Edit action.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Distinct Propagations</td>
<td>The total number of unique documents that were updated via propagation.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Distinct Propagations Per Day</td>
<td>The number of unique documents that had propagations applied per day based on the period reported on.</td>
<td>Informational</td>
</tr>
<tr>
<td>Distinct Propagations Per Hour</td>
<td>The number of unique documents that had propagations applied per hour based on the reviewer’s total usage time.</td>
<td>Informational</td>
</tr>
<tr>
<td>Distinct Views</td>
<td>The number of unique documents a reviewer looked at over the reported period.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Edits</td>
<td>The total number of editing/coding decisions made over the reported time period.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Edits Per Day</td>
<td>The number of edits performed per day over the period reported on.</td>
<td>Informational</td>
</tr>
<tr>
<td>Edits Per Hour</td>
<td>The number of edits per hour based on the reviewer's total usage time.</td>
<td>Informational</td>
</tr>
<tr>
<td>Mass Edits</td>
<td>The total number of document edits using the Mass Edit action.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Mass Edits Per Day</td>
<td>The number of Mass Edits per day over the period reported on.</td>
<td>Informational</td>
</tr>
<tr>
<td>Mass Edits Per Hour</td>
<td>The number of Mass Edits per hour based on the reviewer’s total usage time.</td>
<td>Informational</td>
</tr>
<tr>
<td>Propagations</td>
<td>The total number of documents that were updated via propagation.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>Propagations Per Day</td>
<td>The number of propagations applied per day based on.</td>
<td>Informational</td>
</tr>
<tr>
<td>Propagations Per Hour</td>
<td>The number of propagations applied per hour based on the reviewer’s total usage time.</td>
<td>Informational</td>
</tr>
<tr>
<td>Total Usage Time</td>
<td>The total usage time is calculated as the difference between the time the user first views or edits any document in the workspace and the time the user last views or edits any document in the workspace per session. A session is anytime the user has logged in to Relativity. All sessions for the selected date range are then totaled per user.</td>
<td>Hour, Minute</td>
</tr>
<tr>
<td>Views</td>
<td>The total number of documents a reviewer looked at over the reported period.</td>
<td>Count, InWhole</td>
</tr>
<tr>
<td>-------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Distinct Mass Edits Per Hour</td>
<td>The number of distinct Mass Edits per hour based on the reviewer's total usage time.</td>
<td>Informational</td>
</tr>
<tr>
<td>Distinct Mass Edits Per Day</td>
<td>The number of distinct Mass Edits per day over the period reported on.</td>
<td>Informational</td>
</tr>
</tbody>
</table>

**Users Pricing Items Description:**

<table>
<thead>
<tr>
<th>Charge Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Charge – Logged in</td>
<td>Any users who have logged in to Relativity.</td>
</tr>
<tr>
<td>User Charge – Had Access</td>
<td>Any users who was with enabled Relativity access for at least one day.</td>
</tr>
</tbody>
</table>

**Tasks Pricing Items Description:**

<table>
<thead>
<tr>
<th>Metric Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Task</td>
<td>To charge the client for something out of the predefined Relativity pricing metrics</td>
</tr>
</tbody>
</table>
Appendix B – Usage Data

For RelativityOne

Navigate to the Usage Data tab and you will see the following view:

- **Subscribed Data Tier**: The size of the data given for your usage.
- **Period dropdown**: Choose from when you want to see the data usage.
  - **Current Month**: Shows the usage data for the current month.
  - **Last 30 days**: Shows the usage data for the last 30 days.
- **Staging Fence Data Usage**: All files that are in staging area.
  - **Current**: The current staging fence data used for the period.
  - **Peak**: The peak of staging fence data usage within the period.

The Usage Data view shows:

- **Staging Fence Data Usage**

<table>
<thead>
<tr>
<th>Usage Type</th>
<th>Current (GB)</th>
<th>Peak (GB)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used</td>
<td>374.07</td>
<td>623.46</td>
</tr>
<tr>
<td>Remaining</td>
<td>2185.93</td>
<td>1036.65</td>
</tr>
</tbody>
</table>

- **Published Data Usage**

<table>
<thead>
<tr>
<th>Usage Type</th>
<th>Current (GB)</th>
<th>Peak (GB)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used</td>
<td>124.69</td>
<td>374.07</td>
</tr>
<tr>
<td>Remaining</td>
<td>387.31</td>
<td>137.93</td>
</tr>
</tbody>
</table>
- **Published Data Usage**: All files that are Published.
  - **Current**: The current published data used for the period.
  - **Peak**: The peak of published data usage within the period.

**Note**: If there are more than 1 hosts, the information is gathered for all of them and the total is displayed in the usage diagrams.