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As of the October 2017 RelativityOne release, Review Manager will no longer be supported. The latest version of Review Manager is 9.3.0.67 and there will be no upgrades beyond 9.3.0.67. We encourage you to download Case Metrics, which is very similar to Review Manager. If you'd like to learn more about Case Metrics, see Case Metrics. If you have any questions, please reach out to PM@relativity.com.
1 Review Manager

Review Manager generates forecasts, insights, and optimizations to help track the time and cost of review. Review Manager’s graphical reports of key review metrics help streamline workflows and implement best practices.

Using Review Manager

Imagine that your law firm is representing a corporation that intends to merge with another corporation. Due to growing concern over how the merger might affect competition in your client’s market, the government issued a second request, meaning you now have 30 days to produce the applicable documents in order to move forward with the case.

You start by hiring a team of 15 contract attorneys to help review all the documents involved. You’re under time and budget constraints, so you use Review Manager to help streamline and optimize your review process.

First, you create a Forecast in Review Manager so that you can begin entering details about the review. Here, you enter how many documents you anticipate your team needs to review, how the review is structured, how fast the attorneys can review, any budget restrictions, and a target completion date.

Once you create the Forecast, you enter details in objects called Tiers, which track the work that needs to be done, and Roles, which track who will be doing the work. You enter your first tier, the first pass review, and the role of contract attorney. Your associates then enter the rest of the review information in Review Manager.

Shortly after the first pass review begins, you generate a Forecast report to see if your preliminary assessment is viable. Using this report, you determine if you’re off to a good start. Later in the review process, you generate an Insight Summary report. This report tells you how the actual work is progressing. You may notice that while your first pass review is meeting the deadline, your senior attorneys aren’t reviewing at the rate you estimated in order to meet the privilege review deadline. Based on Review Manager’s Show Optimization suggestions, you decide to hire three more senior attorneys to make the deadline.

As the review progresses, you continue to monitor the Insight Summary report and run other individual reports to track each attorney’s review progress and additional document review trends. You adjust your resources as needed and are able to produce the applicable documents within the judge’s time line.

1.1 Review Manager compatibility matrix

<table>
<thead>
<tr>
<th></th>
<th>Relativity 9.4</th>
<th>Relativity 9.3</th>
<th>Relativity 9.2</th>
<th>Relativity 9.1/9.0</th>
<th>Relativity 8.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Manager 9.3.0.67</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 9.3.0.42</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager</td>
<td>Relativity 9.4</td>
<td>Relativity 9.3</td>
<td>Relativity 9.2</td>
<td>Relativity 9.1/9.0</td>
<td>Relativity 8.2</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------</td>
<td>----------------</td>
<td>----------------</td>
<td>-------------------</td>
<td>----------------</td>
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<tr>
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<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.1.32</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.1.28</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.1.27</td>
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<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Review Manager 8.4.1.25</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.1.22</td>
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<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Review Manager 8.4.1.21</td>
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<td>X</td>
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<td></td>
<td></td>
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<td>Review Manager 8.4.1.7</td>
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<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.0.51</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.0.50</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review Manager 8.4.0.36</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
### 1.2 Review Manager life cycle

Review Manager generates forecasts to predict and measure the time, cost, and efforts required for a document review project. It displays these metrics in graphical reports for trend recognition and other analysis. The following are examples of how Review Manager can assist with review workflow.

- **Forecasts:**
  - Calculate time and cost estimates for document review projects.
  - Provide graphical timelines of forecasted data to enhance early project assessment.

- **Insights:**
  - Provide real-time review metrics for trend identification analysis.
  - Display information graphically for quick comprehension of project status, distribution and decision-making assistance.

- **Coding Overturns:**
  - Track the number of overturns a reviewer accrues during the course of the review.
  - Track down the overturned documents.

- **Optimizations:**
  - Present suggestions for increasing review efficiency and deadline integrity.
  - Offer course corrections prior to or during a review.
1.3 Installation and upgrade

Note: Only a user that is a system admin and script admin can import application schema.

1.3.1 Selecting from the Application Library
Follow the steps below to import Review Manager using the Application Library.

1. Select the Relativity Applications tab.
2. Click New Relativity Application.
3. Click Select from Application Library for Application Type.
4. Click ..., and then select Review Manager.
5. Click OK. The following categories on the form should appear in gray: Application Artifacts and Map Fields.
6. Click Import. If the install is successful, the Review Manager tab is visible, and Review Manager is listed on the All Relativity Applications view.

1.3.2 Importing from file
Follow the steps below to import Review Manager using the Applications tab.

1. Select the Relativity Applications tab.
2. Click New Relativity Application.
3. Next to Application Type, select Import From File for Application Type.
4. Click Choose File, and then select the Fact Manager Schema.
5. Click Open. The following categories on the form should appear in gray: Application Information, Application Artifacts, and Map Fields.
6. Click Import. If the install is successful, the Review Manager tab is visible, and Relativity Manager is listed on the All Relativity Applications view.

1.3.3 Security configuration
You must configure certain permissions in order for Review Manager to function properly.

To configure these security settings, complete the following:

1. Create users and add them to a group for configuration with non-system admin permissions.
2. Navigate to the Administration tab > Workspace Details.
3. Click Edit Permissions.
4. Click Add Group to add the group to which your non-system admin users belong to this workspace.
5. Select the desired group and click Set Permissions.

6. Select Object Security and assign Delete and Add permissions for the following:
   - Forecast
   - Reviewer Group
   - Reviewer User
   - Forecast Report
   - Role
   - Forecast Job
   - Forecast Job Item
   - Tier
   - Review Manager Native Type
   - Detail Report Role
   - Relativity Time Zone

7. Select Tab Visibility and grant access to the following tabs:
   - Review Manager
   - Forecast

8. Select Other Settings and assign the following mass operations:
   - Mass Copy

9. Click Save.

All other Relativity permissions behave in standard fashion within Review Manager.

1.3.4 Adding the Review Manager Agent

After you install Review Manager, add the AuditParserAgent and RefreshDataAgent by going to the Agents tab and clicking New Agent. Add at least one agent per environment. See the Agents guide for more information.

Verify the Enable column displays Yes for both agents. See Adding and editing agents in the Agents guide.

1.3.5 Upgrading

Note: You must have valid Relativity Community credentials in order to download any Community file linked to the documentation site. You’ll need to enter those credentials on the Community login screen if you’re not already logged in. If you’re already logged in to the Community at the time you click a link, the file is automatically downloaded in the bottom left corner of your screen. If you get an error message stating "URL No Longer Exists" after clicking a Community link, it may be due to a single sign-on error related to the SAML Assertion Validator, and you should contact your IT department.

Review Manager updates occur concurrently with Relativity product updates. You can find information about Review Manager product updates in the Relativity release notes.

To upgrade the application use one of the following methods:
1. **Upgrade to the latest Relativity product update** - Upgrading to the latest Relativity update will automatically upgrade Review Manager to the latest version.

2. **Upgrade Review Manager only** - Download the newly released schema from the Relativity Community and import it into the application library.

### 1.4 Accessing Review Manager

To access Review Manager, log in to Relativity and select a case workspace. A Review Manager tab is available if Review Manager is installed on that specific workspace.

**Note:** Review Manager must be installed on each workspace and users must have rights to see Review Manager tab.

### 1.5 Forecasts

Forecasts are the starting point and the most important component in managing your review. Through Review Manager you can update your forecast throughout the review process. Enter as much information up front as you can to define your forecast to keep it complete. Your forecast is only as valuable as the information you include in it.

**Note:** There can be only one active forecast per workspace at a time. You can quickly see which forecasts are active by clicking on Review Manager > Forecast and noting whether the Active field is set to Yes or No.

#### 1.5.1 Adding and editing a forecast

To create or edit a new forecast:

1. Click **New Forecast**.
2. Edit an existing forecast by clicking the edit link next to the forecast name.
3. Add or edit information pertaining to the forecast on the Forecast screen.
4. Click **Save**.

See [Forecast fields below](#) for details.

### 1.6 Forecast fields

The Forecast layout contains the following fields:
- **Name** - displays the name of the forecast.
- **Review Start Date** - the date when the review began or is expected to begin.
- **Deadline Date** - the targeted completion date of a review (manually entered).
- **Calculated Review End Date** - system calculated end date base on forecasted number or documents, number of reviewers, and review rates.
- **Total Documents** - total number of documents or expected number of documents for review
- **Billable Unit** - the unit for what billing method is to be employed. This gives you the flexibility to keep track of cost from different perspectives. For example, you may calculate cost by Reviewer Hour or by Document e.g. $100 per hour. The available Billable Units are:
  - Document
  - Gigabyte
  - Page (documents must be imaged)
  - Reviewer Hour
- **Description** - a field describing Forecast in greater detail.
- **Case** - case title or case number.
- **Active Forecast** - denotes an active Forecast when checked and enables Data Refresh functionality for current forecast. Only one forecast in a workspace can be active.
- **Data Last Refreshed On** - the date and time the forecast data was last modified.
- **Currency Symbol** - enter the money symbol that appears on the reports.

**Other**

- **System Last Modified On** - The date and time the entry was last modified.
- **System Last Modified By** - The name of the user who last modified the entry.
- **Comments** - additional information, mental impressions, or messages to colleagues related to the forecast or review.
1.7 Tiers

A tier describes a sub-set of work to be done as part of the overall review process. During tier creation, enter details about the work to be done, the number of documents affected, and the time anticipated to complete the specified work.

1.7.1 Adding and editing a tier

Once you create a forecast, you can add or edit a new tier.

To add or edit a new tier:

1. Click New.
2. Edit an existing tier by clicking the edit link next to the tier name.
3. Add or edit information to the tier on the Tier Forecast screen.
4. Click Save.

See Tier fields below for details.

1.8 Tier fields

The Tier Forecast layout contains the following fields:
- **Forecast Name** - the name of the forecast. This value is auto-populated with the forecast name.
- **Tier Name** - the descriptive name of the tier. For example, First Pass, QC Pass, Privilege Pass.
- **Projected Total Documents** - estimated number of documents that a given tier is anticipated to review.
- **Data Volume (GB or Pages)** - the volume of your data set, either in GB or pages.
- **Tier Order** - the logical sequence in time of a given tier. Tier Order is important because this controls how the tiers are sequenced and displayed graphically.
- **Start Date Method** - calculation technique for estimating the start date of a tier. You can select a specific start date or use a % overlap calculation.
- **Set Calendar Date** - date selected by the user for the forecasted start of a tier. This is used when Set Specific Calendar Date is chosen in the Start Date Method drop-down menu.
- **% Overlap with Previous Tier** - overlap in start times of tiers for a forecast. This is used to estimate start dates of tiers when the % Overlap with Previous Tier is selected in the Start Date Method field.
- **Working Days** - days of the week in which review activity is conducted.
- **Working Hours Per Shift** - number of hours in a shift. Shifts cannot exceed 24 hours.
- **Actual Begin Date** - actual date on which activity for a tier begins. This is determined by the user. From this point forward, actual audit data appears in the application.
- **Available Document Saved Search** - a saved search of the total documents to be reviewed in this tier. This is set up by the user on the Documents tab that holds the criteria for a document to be included in a given tier of review. For example, "designation is not set" could be the criteria for a first level review tier.
- **Completed Document Saved Search** - a saved search of the total documents where the review is complete in this tier. This is set up by the user on the Documents tab that holds the criteria for a document to be included in a given tier of review and considered. For example, "designation is set" could be the criteria for a first level review tier.
- **Available Document Total** - the resulting document total from the Available Document saved search.
- **Completed Document Total** - the resulting document total from the Completed Document saved search.
- **Actual Time** - the amount of time (in hours) that reviewers in the tier have been active in the workspace.

### 1.8.1 Adding saved searches to a tier

Review Manager gives a system admin insight into how a document review is progressing. Using Saved Searches, Review Manager tracks the progress of a review compared to the active forecast. See [Creating saved searches](#).

#### 1.8.1.1 Saved search considerations for Review Manager

In order to ensure accurate calculations, ensure the following:

- Set up your saved searches correctly.
- Make your saved searches **public** when you create them.
The two searches should reflect the universe of documents the tier reviews. In a given tier, the first saved search reflects the documents available for review in the tier and the second saved search captures the documents that have been reviewed in the tier.

The saved searches conditions need to be setup in a way that documents move from the available saved search and funnel to the completed saved search.

For example, the available saved search could have a condition of “designation not set” and the completed saved search could have a condition of “designation is set”. With this setup, any time a reviewer makes a coding decision on the designation field, the document will leave the available saved search and will move to the completed saved search.

### Step 2: Tier Actuals

<table>
<thead>
<tr>
<th>Actual Begin Date:</th>
<th>2/8/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Document Saved Search:</td>
<td>Unreviewed Docs</td>
</tr>
<tr>
<td>Completed Document Saved Search:</td>
<td>Reviewed Docs</td>
</tr>
<tr>
<td>Available Document Total:</td>
<td>151351</td>
</tr>
<tr>
<td>Completed Document Total:</td>
<td>33125</td>
</tr>
<tr>
<td>Actual Time:</td>
<td>571</td>
</tr>
</tbody>
</table>

- **Actual Begin Date** - the date the review starts.
- **Available Document Saved Search** - this should be a saved search of the total documents to be reviewed in this Tier.
- **Completed Document Saved Search** - this should be a saved search of the total documents where the review is completed in this Tier.
- **Available Document Total** - this is the number of documents to review.
- **Completed Document Total** - this is the number of documents completed.
- **Actual Time** - the amount of time (in hours) that reviewers in the tier have been active in the workspace.

### 1.9 Best Practices

The total number of documents to be reviewed in an individual tier should match the total of both searched. Documents should move from the Available Document Saved Search to the Completed Document Saved Search as they are reviewed. As the Available Document Saved Search decreases, the
Completed Document Saved Search increases by an equal number, keeping the total of both searches the same. To ensure this behavior, set up the conditions for the searches correctly.

For example, a simple saved search condition uses a Single Choice field to indicate that a document has been reviewed. When you use this field, documents in the Available Document Saved Search have the condition of the field: Is Not Set and the Completed Document Saved Search has the condition of the field: Is Set. Because Review Manager handles complex conditions, saved searches do not always need to be simple.

Set the Available Document Saved Search as all the documents for review. However, without setting a track-able condition, documents will not move between searches, regardless of what choices are applied to the documents. Review Manager doesn’t track or record progress for the Insight Report.

1.10 Roles

Once you create a forecast, apply at least one role to each tier. A role is a designation for the type of reviewer that actually works on a given tier. Role considerations:

- A tier is a description of the work to be done, whereas the role is a description of the worker performing the work.
- There can be more than one role per tier.
- Reviewers link to the tiers via roles. You must link a reviewer to a role, and then a role to a tier.

Click Refresh Data on the console to update your user list with the most recent Relativity case workspace user data.

1.10.1 Adding or editing a role

1. Click New next to the Role heading on the main Forecast layout.
2. Add or edit information pertaining to the role on the Role layout screen. See Role fields on the next page
3. Click Save. A new role appears in the Role category.

<table>
<thead>
<tr>
<th>Tier</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Tier</th>
<th># of Reviewers</th>
<th>Review Rate</th>
<th>Billable Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Contract Attorney</td>
<td>First Pass Review</td>
<td>3</td>
<td>30</td>
<td>$50.00</td>
</tr>
<tr>
<td>Edit Senior Associate</td>
<td>Privilege Review</td>
<td>1</td>
<td>30</td>
<td>$300.00</td>
</tr>
<tr>
<td>Edit Associate</td>
<td>Second Pass Review</td>
<td>1</td>
<td>20</td>
<td>$150.00</td>
</tr>
</tbody>
</table>
**Note:** The Tier field lives on the Role category and is the role to tier association. There can be multiple roles associated with one tier, therefore, as you define your second or third roles, you can select the same tier if you desire.

## 1.11 Role fields

The Role layout contains the following fields:

<table>
<thead>
<tr>
<th>Role</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forecast Name:</strong></td>
<td>Review Forecast</td>
</tr>
<tr>
<td><strong>Role:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Tier:</strong></td>
<td>Select...</td>
</tr>
<tr>
<td><strong># of Reviewers:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Billable Unit:</strong></td>
<td>Documents</td>
</tr>
<tr>
<td><strong>Billable Rate:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Review Rate (Doc/HR):</strong></td>
<td></td>
</tr>
</tbody>
</table>

- **Forecast Name** - the name of the current forecast in which the user is operating.
- **Role** - the descriptive name of the role as determined by the user.
- **Tier** - select the tier for which to associate the role with.
- **# of Reviewers** - the number of reviewers to be included in a role as estimated by the user.
- **Billable Unit** - the unit by which cost is being calculated. This field should already be auto-populated with the option selected on the forecast. For example, cost per document where document is the billable unit. This is chosen on the forecast home layout and persists to all roles.
- **Billable Rate** - the amount in terms of currency to be applied to the billable unit. For example, $2.00 per document (for document billable unit) or $150.00 per hour (for review hours billable unit).
- **Review Rate (Doc/HR)** - the speed of review in documents per hour as estimated by the user.

### 1.11.1 Linking roles and reviewer user or groups

After saving your new role, you can now link users (reviewers) and/or user groups to your role. Users must belong to a group outside of the system administrator or case administrator group in order for **Refresh Groups/User** to work successfully.

To link a reviewer or review group to a role:
1. Click the name of the reviewer or review group.
2. Click Link.
3. Select the user(s) or group(s) you want to link to the role from the pop-up window.

**Notes:**
- Only Relativity users that have access to the current workspace via their existing Relativity group permissions display in the pop-up window. **Warning**, after clicking **Refresh Groups/User**, any user that has access to Review Manager can see all users and groups for that workspace.
- In order for **Refresh Groups/User** to work successfully, users must belong to a group outside of the system admin or case admin group.

4. Click **Add**, then click **Set**.
The reviewers populate as shown below:

<table>
<thead>
<tr>
<th>Reviewer User</th>
<th>Reviewer Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link</td>
<td>Unlink</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Reviewer Group</th>
<th>Role Reviewer User</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>(All)</td>
<td>(All)</td>
<td>(All)</td>
<td>(All)</td>
</tr>
<tr>
<td>Edit</td>
<td>Reviewer, 01</td>
<td>Reviewers Level 1</td>
<td>Level 1 Reviewer</td>
</tr>
<tr>
<td>Edit</td>
<td>Reviewer, 02</td>
<td>Reviewers Level 1</td>
<td>Level 1 Reviewer</td>
</tr>
<tr>
<td>Edit</td>
<td>Reviewer, 03</td>
<td>Reviewers Level 1</td>
<td>Level 1 Reviewer</td>
</tr>
<tr>
<td>Edit</td>
<td>Reviewer, 04</td>
<td>Reviewers Level 1</td>
<td>Level 1 Reviewer</td>
</tr>
<tr>
<td>Edit</td>
<td>Reviewer, 05</td>
<td>Reviewers Level 1</td>
<td>Level 1 Reviewer</td>
</tr>
</tbody>
</table>

The reviewer groups populate as shown below:

<table>
<thead>
<tr>
<th>Reviewer User</th>
<th>Reviewer Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link</td>
<td>Unlink</td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>MPB Level 1</td>
</tr>
<tr>
<td>0 Selected Item(s)</td>
<td></td>
</tr>
</tbody>
</table>
1.12 The Review Manager console

Similar to other consoles in Relativity, the Review Manager console appears on the right side of the layout once you’ve created a forecast, tiers, and roles. The Review Manager console contains Review Manager’s ability to run a data refresh.

1.13 Review Manager console options

The Review Manager console contains the following options in the review process:

![Review Manager Console](image)

- **Start Refresh** - on-demand refresh. Before running data refresh, understand that this option can be system intensive and may take a few hours. We recommend running a data refresh during off-peak hours:
  - To avoid negatively impacting system performance if you're working in an existing case
  - If criteria have changed in your saved searches
  - If you're running the option to perform an incremental data refresh

If you encounter a "Failed" message in the status field, contact your system admin.

- **Cancel** - cancels the data refresh process.

**Note:** The Review Manager Console also contains a date and time stamp for the last time data was refreshed.

1.14 Reports

Review Manager generates key metric reports to track your review progress. These reports provide detailed and summary metrics for both forecasted and actual data. You can access reports via the Review Manager console and export the reports via the export menu. The following formats are available: .pdf, .xls, .xlsx, .rtf, .csv, .image.

A completed forecast must be present in order to generate a Forecast Summary Report. An easy way to assess whether a forecast is complete is to verify that the Projected Total Documents field is populated.
1.14.1 Forecast Summary Report

The Forecast Summary report provides a graphic representation of your forecast inputs and calculations. The graphs show aggregations of all tiers and roles for Review Rate, Time, and Cost. In addition to graphically representing data, tables display numeric representations of aggregate data by tier.

This report shows a quick comparison of review structure to budget and deadlines. To generate the report, click the Forecast Summary Report button.
Forecast Summary Report

Workspace: Review

Review Forecast: 150,000

Start Date: 2/8/2016
Deadline Date: 2/19/2016
Projected Date: 3/16/2016

Average Review Rate

- First Pass Review: 600
- QC Review: 300

Review Timeline

- First Pass Review: 28 days
- QC Review: 15 days

Document Review Costs

- First Pass Review: $9,000,000
- QC Review: $2,450,000

Documents Reviewed

- First Pass Review: 150,000
- QC Review: 35,000

Average Review Rate (Docs/Hr)

- First Pass Review: 600
- QC Review: 300

Time (Hrs)

- First Pass Review: 2,500
- QC Review: 351

Completion Date

- First Pass Review: 3/16/2016
- QC Review: 3/6/2016

Cost ($)

- First Pass Review: $9,000,000
- QC Review: $2,450,000

Reviewers (#)

- First Pass Review: 10
- QC Review: 3
1.14.1.1 Optimizing a Forecast Summary Report

After you review your forecast, adjustments might be necessary. In such situations, Review Manager provides suggested optimizations by showing some options. The optimizations display, by default, on the left side of the Forecast Summary Report.

This option breaks each tier down by number of reviewers, number of hours, and review rate. Review Manager displays the differences between the forecasted data and what is recommended in order to bring your project back within its desired parameters.

These suggestions could mean adding additional resources or possibly leveraging different technologies to increase your review rates, such as mass tagging or Assisted Review.

If you elect to employ one or more of Review Manager’s optimization suggestions, you may also elect to go back and revise your forecast (or create a new one) to reflect the adjustments.

1.15 Reports tab

The Report tab contains all Review Manager reports that track actual data - all reports - aside from the Forecast Summary Report. This is the main page where you can monitor the review progress.

The first section of the report tab displays the progress on of the tiers. The second section holds all the reports.
1.15.1 Insight Summary Report

Once the review begins, the Insight Summary Report compares forecasted data to your actual progress. You can see the status of your review as compared to your forecasted information with the Insight Summary Report.

Like the Forecast Summary Report, this information appears graphically and in tables. Optimization suggestions are available for aligning your actual data with your forecasted data. If your project is off target, the optimization table suggests different strategies for getting your project back on target.

A tier is considered completed when 100% of the documents in that tier have been reviewed. Once a tier is completed, Review Manager stops calculating the review rate. If you add more documents to your saved search, the percentage of documents reviewed adjusts from 100%, and Review Manager begins calculating the review rate again.
1.15.2 Detail Reports: Reviewers, Roles, Document, and Overturns

Review Manager reports and gets insights from Reviewers, Roles, and Document types during a review. Using this information, you can identify the behavior trends in the observed review. These trends might reveal weaknesses you can improve upon to influence the outcome of your review. Alternatively, you may notice a trend that seems to be speeding up the review, and wish to apply the trend to other tiers. The Detail reports provide quick insight into where deviations are occurring from your original forecast. You can monitor this information in real time and become more proactive in your review management decisions.

1.15.2.1 Reviewers Detail Report

The Reviewers Detail Report shows trends by reviewer for specific metrics. All of the detail reports can show data over an hourly or daily interval for various date ranges. For example, you can view the Average Total Edits per Hour over the course of a week. You can also track and analyze Active Time, Distinct Edits, Distinct Views, Total Edits, Total Views, Mass Edits, Propagations, Logins - Logouts, and Total Usage Time.

**Note:** Users must be associated with Roles for their data to reflect in these reports.

The reports always display the first 10 selections alphabetically on the graph, but all selection display in the example. Additionally, the graph shows two standard deviations above the average value for any chosen metric (a horizontal dashed line denotes the average and gray banding denotes one standard deviation).
Report Interval and Report Metric field selections:

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Average Active Time</th>
<th>Min</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewer, 01</td>
<td>6</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>QCReviewer, 01</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>QCReviewer, 02</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>QCReviewer, 03</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Daily total - Distinct Edits - retrieves a report on the amount of documents edited, grouped by day. The actions taken on account on the audit are “update, update mass edit, update mass replace, update propagation and delete”.

Daily total - Distinct Views - retrieves a report on the amount of documents viewed, grouped by day. The action taken on account on the audit is “view”.

Daily Total - Total Edits - retrieves a report on the amount of editions completed, grouped by day. The actions taken on account on the audit “update, update mass edit, updates mass replace, update propagation and delete”.

Daily Total - Total Views - retrieves a report on the amount of views completed, grouped by day. The action taken on account on the audit is “view”.

Daily Total - Active Time - this report takes on account all actions “view, update, update mass edit, update mass replace, update propagation and delete” from the audit and divides the day on 15 minutes block, so if an action or several actions got registered on a block of 15 minutes, these 15 minutes will be counted as active time. These blocks are counted from hour to hour without taking into consideration user’s login or log out time. This report’s graphic will round the number so if the number is minor than 0.5 will show the number below and if it’s higher than 0.5 will round it to the next whole number.

Daily Total - Mass edits - retrieves a report on the amount of mass edits completed, grouped by day.

Daily Total - Propagation - retrieves a report on the minimum, maximum, and average number of propagations, grouped by day.

Daily Total - Logins-Logouts - retrieves a report on the first login time, last logout time, and total logins/logouts of the days filtered on the report.

Hourly Average - Distinct Edits - retrieves a report on the amount of documents edited, grouped by an average per hour of the days filtered on the report. The actions taken on account on the audit are “update, update mass edit, update mass replace, update propagation and delete”.

Hourly Average - Distinct Views - retrieves a report on the amount of documents viewed, grouped by an average per hour of the days filtered on the report. The action taken on account on the audit is “view”.

Hourly Average - Total Edits - retrieves a report on the amount of editions completed, grouped by an average per hour of the days filtered on the report. The actions taken on account on the audit are “update, update mass edit, update mass replace, update propagation and delete”.

Hourly Average - Total Views - retrieves a report on the amount of views completed, grouped by an average per hour of the days filtered on the report. The action taken on account on the audit is “view”.

Hourly Average - Mass edits - retrieves a report on the amount of mass edits completed, grouped by an average per hour of the days filtered on the report.

Hourly Average - Propagation - retrieves a report on the minimum, maximum, and average number of propagations, grouped by an average per hour of the days filtered on the report.
1.15.2.2 Roles Detail Report

The Role Detail Report compares trends among the different Roles that have been created in Review Manager. All of the roles created workspace wide are available in this report. Only activity from reviewers associated with roles displays in this report.

<table>
<thead>
<tr>
<th>Role</th>
<th>Average Active Time</th>
<th>Min</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1 Reviewer</td>
<td>82</td>
<td>0</td>
<td>128</td>
</tr>
<tr>
<td>QC Reviewer</td>
<td>2</td>
<td>0</td>
<td>8</td>
</tr>
</tbody>
</table>
1.15.2.3 Document Detail Report
The Document detail report is similar to the Reviewer Insight detail report and the Role Insight detail report. You can view information on the average active time for the different document native types loaded into Relativity with the Document detail report.
**Document Detail Report**

Data Generated On: 2/27/2016 6:41 PM

**Workspace:** Enviro United States

**Forecast:** Review Forecast

**Total Documents:** 150,000

**Start Date:** 2/16/2016

**Deadline Date:** 2/19/2016

**Projected Date:** 3/10/2016

---

**Total Active Time per Day by Document Type**

---

First 10 selected Document Types are alphabetically displayed in chart. Chart range is two standard deviations (95%).

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Average Active Time</th>
<th>Min</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compuserve GIF</td>
<td>1</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Adobe Acrobat (PDF)</td>
<td>5</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Enhanced Windows Metafile</td>
<td>2</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Clear Signed S/MIME (Secure/MIME)</td>
<td>3</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>DBase III</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
1.15.2.4 Reviewer Overturns Report
The Reviewer Overturns report tracks the overturns a reviewer accrues over the course of the review. This report takes into account the field assigned to the settings that brings up the numbers of documents reviewed based on the following:

- whether there was a first modification from the original value to a new one
- the documents overturned, including those self-overturned by reviewer or group

The Reviewer Overturns report contains the following columns:

- **Reviewed** - counts the number of times a reviewer or group has made an edit on the field the report is based on.
- **Overturned** - counts overturns for the reviewer or group that previously coded the document before it was overturned.
- **% Overturn** - calculates the percentage of documents overturned. If you don't select Visualize Self Overturn, this number includes self overturns.
- **% Self Overturn (optional)** - calculates the percentage of documents self overturned by the reviewer or group. This column is only visible if you select Visualize Self Overturn.

1.15.2.5 Document Overturn Report
The Document Overturns Report tracks which documents have been overturned. The report shows the original coding value and reviewer, and the last overturned value and the responsible reviewer. The document also shows the total amount of overturns on a document.

Clicking the total number of overturns value will result in a module window that displays the various ways the users coded the document.

View an example of a Document overturn report
1.16 Detail report input fields

View a description of the Detail report input fields
Below are the descriptions of the Detail report input fields:

- **Detail Report Reviewers** - reviewers to be displayed on the detail report. Only reviewers that have been added to the application are available.

- **Detail Report Roles** - roles to be displayed on the detail report. All Roles from the workspace are available, but only Roles in current Forecast should be selected.

1.17 Documents Reviewer Report

The Documents Reviewer Report tracks detailed information on who has reviewed a document during a specified date range. The report can filter on a specific field to track how coding decisions changed on that field.

The Documents Reviewer report contains the following columns:

- **Document** - displays the control number of the document. Clicking the control number opens the document in the document viewer.

- **Original Coding Value** - displays the original coding value made on the document.

- **Original Reviewer** - displays the name of the reviewer who made the original coding decision on the document.

- **Original Review Date** - displays the date the original coding decision was made.

- **Last Coding Value** - displays the last coding value made on the document.

- **Last Reviewer** - displays the name of the reviewer who made the last coding decision on the document.

- **Last Reviewed Date** - displays the date the last coding decision was made.
- **Total Reviews** - counts the total reviews on the document. Clicking the number in the **Total Views** column opens a modal with the user(s) who made changes on the document, the value coded, and the date the user made the change.

- **Total Views** - counts the total views on the document. Clicking the number in the **Total Views** column opens a modal with the users who have viewed the document.

**Note:** Documents may change coding decisions more than once, so it's possible for the value in the **Total Reviews** column to exceed the value in the **Total Views** column.

Click to expand image:

### 1.18 Reviewer Productivity Report

The Reviewer Productivity Report displays all of a reviewer or group’s coding decisions for a specified field. The report shows the total number of documents where a reviewer or group made coding decisions on that field as well as the number of times a reviewer or group used each choice on the field.

You can run the Reviewer Productivity Report on the following field types:

- Single choice
- Multiple choice
- Yes/No
1.19 Resources

Additional Review Manager resources are available on Relativity.com.
1.19.1 Prior installations of Review Manager
For installations of Review Manager on Relativity 7.4 and earlier, locate the following resources on the Relativity Community:

- Installation Guide
  - Provided in the Installation Package .zip file
- Reference Guide
  - Provided in the Installation Package .zip file

As of the October 2017 RelativityOne release, Review Manager will no longer be supported. The latest version of Review Manager is 9.3.0.67 and there will be no upgrades beyond 9.3.0.67. We encourage you to download Case Metrics, which is very similar to Review Manager. If you'd like to learn more about Case Metrics, see Case Metrics. If you have any questions, please reach out to PM@relativity.com.

1.20 Setting up and running the Reviewer Productivity Report

The Reviewer Productivity Report displays all of a reviewer or group's coding decisions for a specified field. The report shows the total number of documents where a reviewer or group made coding decisions on that field as well as the number of times a reviewer or group used each choice on the field.

Before running the Reviewer Productivity Report, be sure to install and configure Review Manager using the following documentation:

- Installation and upgrade on page 8
- Forecasts on page 10
- Tiers on page 12
- Roles on page 16

You can run the Reviewer Productivity Report on the following field types:

- Single choice
- Multiple choice
- Yes/No

To run the report, use the following steps:

1. Navigate to the Review Manager tab.
2. Under the Select Report section, click the Review Productivity Report radio button.
3. Complete the following fields on the Report Settings section:
   - Report Start Date - select the date to begin reporting from the calendar pop-up.
   - Report End Date - select which date to end reporting from the calendar pop-up.
   - Check All - select this checkbox to include all reviewers or all groups listed.
   - Reviewers - select which reviewer to report on from the list.
- **Groups** - select which group to report on from the list.
- **Field** - select which field to report on from the drop-down list.

**Note:** You cannot run the report on both reviewers and groups at once; you must choose either reviewer(s) or group(s).

4. Click **Generate Report**.
   The Reviewer Productivity Report displays the following information:
   - Total Number of documents reviewed.
   - Total number of documents per choice on the field.
When reviewing the report, take note of when the data was last refreshed. You can find this information to the right of the screen in the Review Manager Console. To run a data refresh, click the **Start Refresh** button.

**Note:** The data refresh option can be system intensive and may take a few hours. We recommend using data refresh during off-peak hours. For more information, see the Review Manager Console section.
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