

Case Metrics

September 29, 2020

Table of Contents

1 Case Metrics	3
1.1 Case Metrics Compatibility Matrix	3
1.2 Special considerations for Case Metrics	3
1.3 Installing Case Metrics	4
1.3.1 Instance level installation and security configuration	4
1.3.2 Workspace level installation and security configuration	5
1.4 Reports	6
1.4.1 Case Metrics profiles	8
1.4.2 Reviewer Choices Report	10
1.4.3 Reviewer Statistics Report	11
1.4.4 Reviewer Overturn Report	14
1.5 Reviewer Metrics dashboard	16
1.6 Using the Scheduler	18
1.6.1 Scheduled Report layout fields	19

1 Case Metrics

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.

The Case Metrics application is a bundle of three reports and a dashboard:

- **Reviewer Choices Report**- measures how reviewers code documents.
- **Reviewer Statistics Report**- measures how much time reviewers spend reviewing documents.
- **Reviewer Overturn Report**- measures accuracy of coding decisions.
- **Reviewer Metrics dashboard** - contains 4 interactive widgets that display reviewer performance information.

You can group these reports by users, groups, workspaces, matters, or clients.

This application functions on both the instance level and workspace level and is available for download in the Relativity Community.

1.1 Case Metrics Compatibility Matrix

Relativity version	Compatible Case Metrics version
RelativityOne	Case Metrics 11.0.5.3_05032020

1.2 Special considerations for Case Metrics

Keep in mind the following when working with Case Metrics:

- For performance reasons, the Reviewer Choices and Reviewer Overturns reports rely on event handlers, instead of scanning for data stored in the SQL audit table. As a result, these reports only include coding decisions applied after the application is installed.

Notes:

- The Reviewer Statistics report is the only report that analyzes coding decisions applied prior to installation.
 - The Reviewer Choices report only reflects data after the installation of Case Metrics.
 - The Reviewer Overturns report only reflects data after the installation of Case Metrics.
 - It is recommended that you install the application as soon as you deploy the environment to make full use of the event handlers for capturing and reporting data.
-

- When filtering for workspaces in the reports, you will only see workspaces marked as Active and workspaces not part of template clients/matters.

1.3 Installing Case Metrics


You can install Case Metrics on both the instance level and workspace level.

1.3.1 Instance level installation and security configuration

To install Case Metrics at the instance level:

1. Navigate to the **Application Library** tab.
2. Click **Upload Application**.
3. Click **Choose File**.
4. Select the Case Metrics rap file and click **Open**. The Case Metrics rap file is available for download in the [Relativity Community](#).

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.

5. Click **Save**.
6. Click  next to **Workspaces** and select a single workspace. You only need to install Case Metrics in one workspace for it to work at the instance level.
7. Go to the **Agents** tab and add the **Case Status Agent**. The Case Status Agent finds each workspace in the instance, including those that are created after the installation of Case Metrics, and makes it possible for Case Metrics to pull in data from all of the workspaces in your instance.

For more information, see Installing applications.

1.3.1.1 Instance level security configuration

To configure instance security for Case Metrics, you need to

- Ensure that users whom you want to use Case Metrics at the workspace level are members of every group and workspace that you want them to be able to view data from.
For more information, see Installing applications.
- Grant instance permissions to each group that you want to be able to view Case Metrics at the instance level.

To configure instance permissions for Case Metrics:

1. Navigate to the **Instance Details** tab.
2. Click **Manage Permissions**.

3. Click **Edit Permissions** for a group on the **Group Management** tab.
4. Grant access to the instance permissions listed in the table.

Object Security	Tab Visibility	Admin Operations
<ul style="list-style-type: none"> ■ N/A 	<ul style="list-style-type: none"> ■ Case Metrics (parent) <ul style="list-style-type: none"> ○ Reports (child) ○ Scheduler (child) 	<ul style="list-style-type: none"> ■ View Admin Repository


As long as these permissions are set, non-system admins can have access to Case Metrics, but they can only report on workspaces and groups they have access to.

1.3.2 Workspace level installation and security configuration

To install Case Metrics at the workspace level:

1. Navigate to the **Application Library** tab.
2. Click **Upload Application**.
3. Click **Choose File**.
4. Select the Case Metrics rap file and click **Open**. The Case Metrics rap file is available for download in the [Relativity Community](#).

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.

5. Click **Save**.
6. Click  next to **Workspaces** and select the workspaces where you want to install the application.
7. Click **Save**.

For more information, see [Installing applications](#).

1.3.2.1 Workspace level security configuration

To configure workspace level security, you need to

- Ensure that users whom you want to use Case Metrics are members of every group and workspace that you want them to be able to view data from.
For more information, see [Groups](#).
- Grant workspace security permissions to each group that needs to use Case Metrics at the workspace level.

To configure workspace security permissions for Case Metrics:

1. Navigate to the **Instance Details** tab.
2. Click **Manage Permissions**.
3. Click **Edit Permissions** for a group on the **Group Management** tab.
4. Grant access to the instance permissions listed in the table.

Object Security	Tab Visibility	Admin Operations
■ N/A	■ N/A	■ View Admin Repository

5. Navigate to the **Relativity Utilities** console on the **Workspace Details** tab of the workspace where you would like to use Case Metrics.
6. Click **Manage Workspace Permissions**.
7. Click **Edit Permissions** for a group on the **Group Management** tab.
8. Grant access to the workspace security permissions listed in the table.

Object Security	Tab Visibility	Other Settings
■ N/A	<ul style="list-style-type: none"> ■ Case Metrics (parent) <ul style="list-style-type: none"> ○ Reports (child) ○ Reviewer Metrics (child) 	■ View All Audits

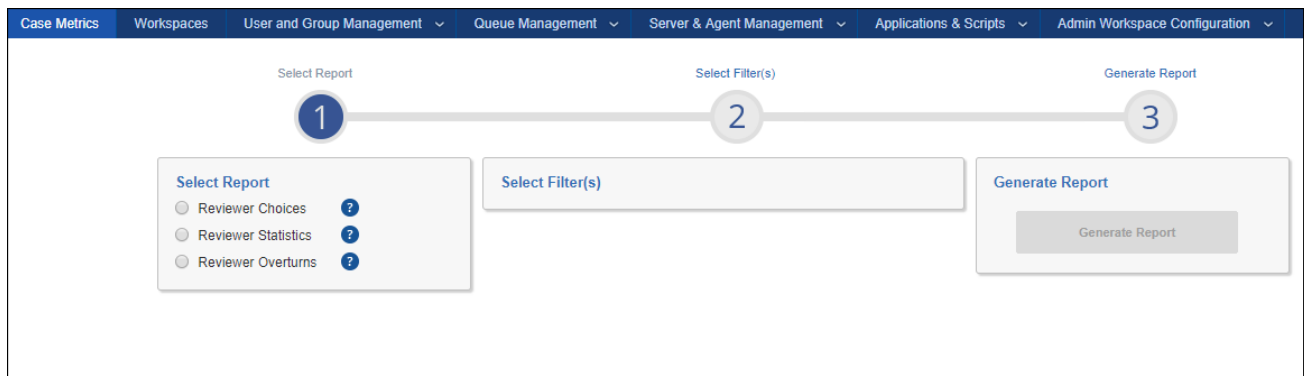
Note: You must configure the workspace security permission in each workspace that you would like to use Case Metrics.

1.4 Reports

Once you install Case Metrics, the application appears as a tab in Relativity at the instance level. When you click on the tab, Case Metrics loads and you have the option of running three reports: Reviewer Choices, Reviewer Statistics, and Reviewer Overturn.

To run each report, select a filter source, fill out the required fields, and then click **Generate Report**. There are five filter sources to choose from: client, matter, workspace, group, or user. You can filter on multiple clients, matters, workspaces, groups, or users.

By default, Service Accounts and System Admins are excluded from Case Metrics reporting. You can include them by selecting the **Include Service Accounts** and/or the **Include System Admins** checkbox (es).



The results for each report include tabs to display the Average by Reviewer and Average by filter source. You can compare individual reviewers against averages and standard deviations within a data set. With the Reviewer Choices and Reviewer Overturns report, the Average and Standard Deviation is based on the chosen field.

You can export spreadsheet or PDF versions of all the reports. When you select more than one workspace, the report includes an Averages table with aggregated values across the applicable workspaces, per reviewer. Upon export, you have the option to select a single tab of results. When multiple tabs are selected and exported to Excel, they become their own sheets.

Beginning in May 2018, you can also email report results by selecting the Email Report button next to the Export button.



Note: To access report results, users must have access to the Case Metrics tab and to the workspace associated with the report.

You can filter on a specific saved search within a workspace. If you want to filter on a saved search that spans multiple workspaces, make sure the saved search is consistently named across all workspaces.

When choosing to filter on a saved search, the results will only display filter sources in which the saved search appears.

Note: You need to type to two characters to pull back search results. It will only pull back the first 15 results. To narrow the search, type more characters.

Select Filter(s)

Filter Source: Group

Group Name: Level 1 x

Date: Today

Field:

Saved Search: Select saved search

Include User and Group Accounts:

- System Administrators
- Service Accounts

1.4.1 Case Metrics profiles

Beginning in July 2018, you can save filter sources as public or private profiles at the workspace or instance level.

To save filter sources as a profile:

1. Select report, filters, and enter required fields.
2. In the Profile section, check the box to **Save as Profile**.
3. Enter the **Profile Name**.
4. Select the owner, whether it is a specific user, a system administrator, or public. Or, click **Me** to assign it to yourself.

The screenshot displays a three-step configuration process for a report. Step 1, 'Select Report', is completed. Step 2, 'Select Filter(s)', is also completed. Step 3, 'Select Action', is the current step. The 'Select Filter(s)' section is populated with the following values: Filter Source: Group; Group Name: Template Review Group; Date: Last Month; Field: Confidential; Saved Search: Select saved search; Include Self-Overturns: unchecked; Include: System Administrators (unchecked), Service Accounts (unchecked); Profile: Save as Profile (checked); Profile Name: Confidential Field- July 2018; Owner: Medrano, Cynthia.

5. Click **Save as new Profile**.

To access a saved profile:

1. Navigate to **Case Metrics**.
2. Under Select Report, there is a grayed-out drop-down option. Select this option to unlock the drop down.


3. Select the saved profile you would like to use to run your report.

The screenshot shows a three-step process for generating a report. Step 1, 'Select Report', is highlighted with a red box and shows radio buttons for 'Reviewer Choices', 'Reviewer Statistics', and 'Reviewer Overturns', with 'Confidential Field-Last' selected. A dropdown menu is open below it, listing 'Filter', 'Jessica Gomez Profile', 'Jessica Gomez Profile #2', and 'Confidential Field-Last Month'. Step 2, 'Select Filter(s)', includes fields for 'Filter Source' (Group), 'Group Name' (Template Review Group), 'Date' (Last Month), and 'Field' (Confidential). It also has a 'Saved Search' field, 'Include' checkboxes for 'System Administrators' and 'Service Accounts', a 'Profile' checkbox for 'Save as Profile', a 'Profile Name' field (Confidential Field-Last Month), and an 'Owner' dropdown (Medrano, Cynthia) with a 'Me' button. Step 3, 'Select Action', contains buttons for 'Generate Report', 'Save as new Profile', 'Update Profile', and 'Clear Filters'.

4. Click **Generate Report**.

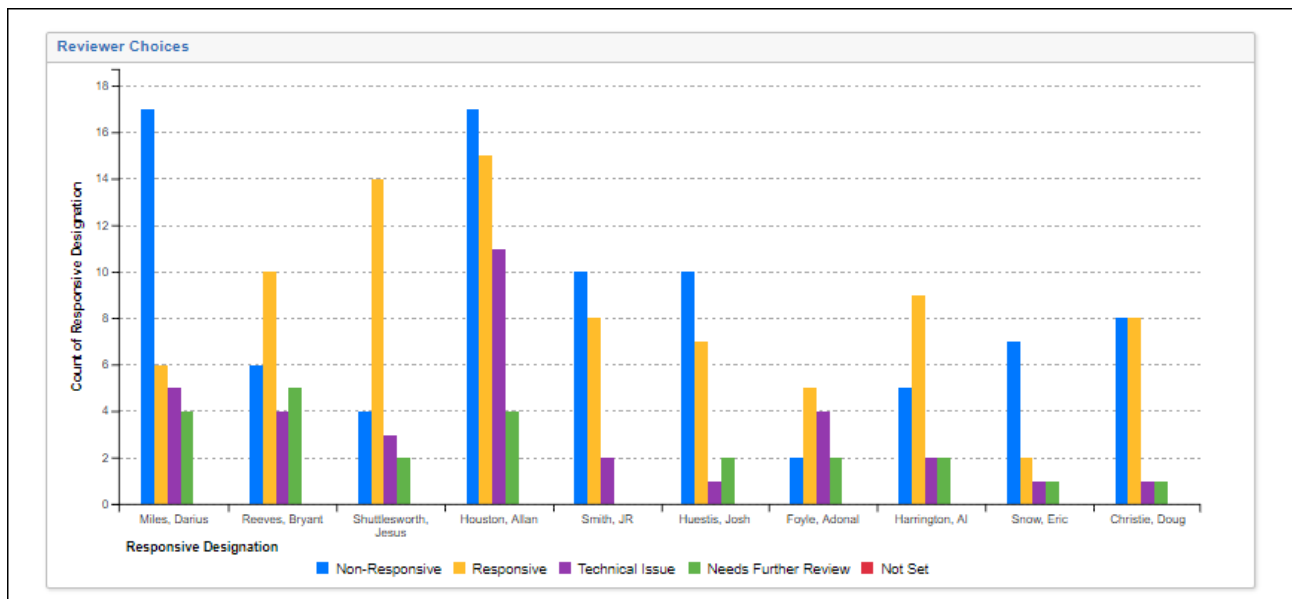
To edit a profile:

1. Select the profile from the saved profiles drop-down list.
2. Make your changes in the Select Filter(s) section.
3. Click **Update Profile**.

To delete a profile, hover over the profile you want to delete and click the delete icon ().

1.4.2 Reviewer Choices Report

The Reviewer Choices Report shows coding decisions by reviewer for the following field types in your workspaces: Single Choice, Multiple Choice, and Yes/No. If you run the report on a single workspace, the report displays a bar chart as shown below.



Note: If you run the report on multiple workspaces and select a Choice field that does not exist in all workspaces, no data will appear for those workspaces which don't have the Choice field selected.

Once you choose a filter source, fill out the following report filters:

- **Filter Source Name** - select a single or multiple client(s), matter(s), workspace(s), group(s), or user(s).
- **Date** - select from seven different date ranges, including: Today, Yesterday, This Week, Last Week, This Month, Last Month, or a Custom Start and End Date.
- **Field** - select the field(s) for which you'd like to run the report.
- **Saved Search** - select a saved search for which you'd like to run the report.

Note: The Reviewer Choices report does not include documents coded via Propagation or Mass Edits.

1.4.3 Reviewer Statistics Report

The Reviewer Statistics Report shows the efficiency of reviewers and how many documents were reviewed over a specified date range. This report records Document Edits/Views regardless of field and is not based on user login or user logout.

Note: Beginning June 30, 2018, the Reviewer Statistics script is now compatible with audits stored in Data Grid. If your workspace is Data Grid-enabled, Reviewer Statistics pulls data from Audit.

Reviewer Statistics											
Average Reviewer Statistics											
Workspace	Name	Total Usage Time (HH:MM:SS)	Views	Distinct Views	Edits	Distinct Edits	Edits Per Hour	Edits Per Day	Distinct Edits Per Hour	Distinct Edits Per Day	Average File Size (Kb)
(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)	(All)
Joe Dumars v. Horace Grant	Workspace Standard Deviation	0:00:30	5.41	5.41	5.67	5.67	180.43	5.67	180.43	5.67	11.51
Joe Dumars v. Horace Grant	Workspace Average	0:01:32	6.4	6.4	6.2	6.2	197.15	6.2	197.15	6.2	8.86
Joe Dumars v. Horace Grant	Winter, Tex	0:01:00	0	0	0	0	0	0	0	0	0
Joe Dumars v. Horace Grant	Kerr, Steve	0:01:57	10	10	10	10	307.69	10	307.69	10	28.12
Joe Dumars v. Horace Grant	Kukoc, Toni	0:01:57	11	11	11	11	338.46	11	338.46	11	7.57
Joe Dumars v. Horace Grant	Pippen, Scottie	0:01:46	10	10	10	10	339.62	10	339.62	10	8.6
Joe Dumars v. Horace Grant	Harper, Ron	0:01:00	1	1	0	0	0	0	0	0	0
											Total items: 7

To generate the Reviewer Statistics report,

1. Navigate to the **Reports** tab, which is a child tab of Case Metrics.
2. Select **Reviewer Statistics**.
3. Choose the filters for your report. Filters include:
 - **Filter Source** - select a single or multiple client(s), matter(s), workspace(s), group(s), or user(s).
 - **Date** - select from seven different date ranges, including: Today, Yesterday, This Week, Last Week, This Month, Last Month, or a Custom Start and End Date.
 - **Saved Search** - select a saved search for which you'd like to run the report.
 - **Include Mass Edits** - check this box if you would like to track mass edits.
 - **Include Propagation** - check this box if you would like to track propagations.
 - **Include System Administrators** - check this box if you would like to include system administrators.
 - **Include Service Accounts** - check this box if you would like to include service accounts.
 - **Saved Search** - select a saved search for which you'd like to run the report.
4. Select **Save as profile** if you want to save the selected filters as a profile option. For more information, see Save as Profile.
5. Click **Generate Report**.

The Reviewer Statistics report is comprised of three tabs:

- **Reviewer Statistics** - tallies and returns views, edits, mass edits, and average file size edited by reviewer.

- **Average by Reviewer** - groups reviewers by client, matter, workspace, and user and then by reviewer ID to calculate the average.
- **Average by Workspace** - shows the averages for fields. For each field, Relativity adds the values higher than zero and then divides them by the number of entries for that field.

The Reviewer Statistics report contains the following columns on all three tabs:

- **Workspace** - identifies the workspace on which you are reporting.
- **Name** - identifies the user or group who reviewed documents.
- **Total Usage Time** - retrieves the time a reviewer spent completing View, Edit, Mass Edits, and/or Propagation actions during the period specified.
- **Views** - retrieves a report on the amount of views completed in the Usage Time. The action taken on account on the audit is "view."
- **Distinct Views** - retrieves a report on the amount of distinct views completed in the Usage Time. To count as distinct, the view must occur only once on one document. For example, if you viewed a document five times, that counts as five Views and one Distinct View. The action taken on account on the audit is "view."
- **Edits** - retrieves a report on the amount of edits completed in the Usage Time. The actions taken on account on the audit are "update" and "delete."
- **Distinct Edits** - retrieves a report on the amount of distinct edits completed in the Usage Time. To count as distinct, the edit must occur only once on one document. For example, if you edited a document five times, that counts as five Edits and one Distinct Edit. The actions taken on account on the audit are "update" and "delete."
- **Edits Per Hour** - retrieves a report on the amount of edits completed, grouped by hour. The actions taken on account on the audit are "update" and "delete." This is calculated by dividing the actions total usage time by one hour.
- **Edits Per Day** - retrieves a report on the amount of edits completed, grouped by day. This is calculated over the number of days in the date range you selected to run your report. The actions taken on account on the audit are "update" and "delete."
- **Distinct Edits Per Hour** - retrieves a report on the amount of distinct edits completed, grouped by hour. To count as distinct, the edits must occur only once on one document. For example, if you edited a document five times, that counts as five Edits and one Distinct Edit. The actions taken on account on the audit are "update" and "delete." This is calculated by dividing the actions total usage time by one hour.
- **Distinct Edits Per Day** - retrieves a report on the amount of distinct edits completed, grouped by day. To count as distinct, the edits must occur only once on one document. For example, if you edited a document five times, that counts as five Edits and one Distinct Edit. This is calculated over the number of days in the date range you selected to run your report. The actions taken on account on the audit are "update" and "delete."
- **Mass Edits** - retrieves a report on the amount of mass edits completed in the Usage Time.
- **Distinct Mass Edits** - retrieves a report on the amount of distinct mass edits completed in the Usage Time. To count as distinct, the edits must occur only once on one set of documents.

- **Mass Edits Per Hour** - retrieves a report on the amount of mass edits completed, grouped by hour. This is calculated by dividing the actions total usage time by one hour.
- **Mass Edits Per Day**- retrieves a report on the amount of mass edits completed, grouped by day. This is calculated over the number of days in the date range you selected to run your report
- **Distinct Mass Edits Per Hour** - retrieves a report on the amount of distinct mass edits completed, grouped by hour. To count as distinct, the edits must occur only once on one set of documents. This is calculated by dividing the actions total usage time by one hour.
- **Distinct Mass Edits Per Day** - retrieves a report on the amount of distinct mass edits completed, grouped by day. To count as distinct, the edits must occur only once on one set of documents. This is calculated over the number of days in the date range you selected to run your report
- **Propagations** - retrieves a report on the amount of propagations completed in the Usage Time.

Note: Mass edits and propagations are separate operations from edits and do not equal total edits.

- **Distinct Propagation**- retrieves a report on the amount of distinct propagations completed in the Usage Time. To count as distinct, the propagation must occur only once on one document.
- **Propagations Per Hour**- retrieves a report on the amount of propagations completed, grouped by hour. This is calculated by dividing the actions total usage time by one hour.
- **Propagations Per Day**- retrieves a report on the amount of propagations completed, grouped by day. This is calculated over the number of days in the date range you selected to run your report
- **Distinct Propagations Per Hour**- retrieves a report on the amount of distinct propagations completed, grouped by hour. To count as distinct, the propagations must occur only once on one document. This is calculated by dividing the actions total usage time by one hour.
- **Distinct Propagations Per Day**- retrieves a report on the amount of distinct propagations completed, grouped by day. This is calculated over the number of days in the date range you selected to run your report
- **Average Extracted Text Size** - retrieves the average extracted text size of documents edited by the reviewer.

1.4.4 Reviewer Overturn Report

The Reviewer Overturn Report shows documents overturned and the reviewers who made those changes. An overturn occurs when a reviewer overrides the previous coding decision on a document. The Reviewer Overturn Report reports on the following field types:

- Multiple choice
- Single choice
- Yes/No

Note: The Overturn Report does not capture mass editing or propagation.

Reviewer Overturns				
Workspace	User	Reviewed	Overtuned	% Overturn
(All)	(All)	(All)	(All)	(All)
Workspace1 DO NOT DELETE	Medrano, Cynthia	40	30	75
Workspace1 DO NOT DELETE	Castillo, Anderson	10	0	0
Workspace1 DO NOT DELETE	User, Administrator	11	0	0
Workspace1 DO NOT DELETE	Veloza, Diana	11	0	0
				Total items: 4

Once you choose a filter source, fill out the following report filters:

- **Filter Source Name** - select a single or multiple client(s), matter(s), workspace(s), group(s), or user(s).
- **Date** - select from seven different date ranges, including: Today, Yesterday, This Week, Last Week, This Month, Last Month, or a Custom Start and End Date.
- **Field** - select the field(s) for which you'd like to run the report.
- **Saved Search** - select a saved search for which you'd like to run the report.
- **Includes Self-Overtuns** - check this box if you would like to track changes to a coding decision made by the same reviewer.

The Reviewer Overturn Report contains the following columns:

- **Workspace** - identifies the workspace on which you are reporting.
- **User** - identifies the user or group who made the changes.
- **Reviewed** - counts the number of times a reviewer or group has made an edit on the field the report is based on.
- **Overtuned** - counts overturns for the reviewer or group that previously coded the document before it was overturned. Please note that it's possible for a reviewer to overturn their original coding decision. Overturn counts appear as a hyperlink to a pop-up that contains the following information:
 - **Document Identifier** - identifies the name of the document a reviewer or group coded. The name appears as a hyperlink that opens the document in a standalone viewer.
 - **Original Coding Value** - contains the original coding value.
 - **New Coding Value** - contains the new coding value.
 - **Overtuned By** - contains the name of the reviewer or group that changed the document's coding value.
 - **Date** - contains the date and time the reviewer or group changed the document's coding

value.

Select Report Select Filters(s) Generate Report

Overturns for: Medrano, Cynthia on field: Responsive Export

Items 1 - 10 (of 30) in sets of 10 per page

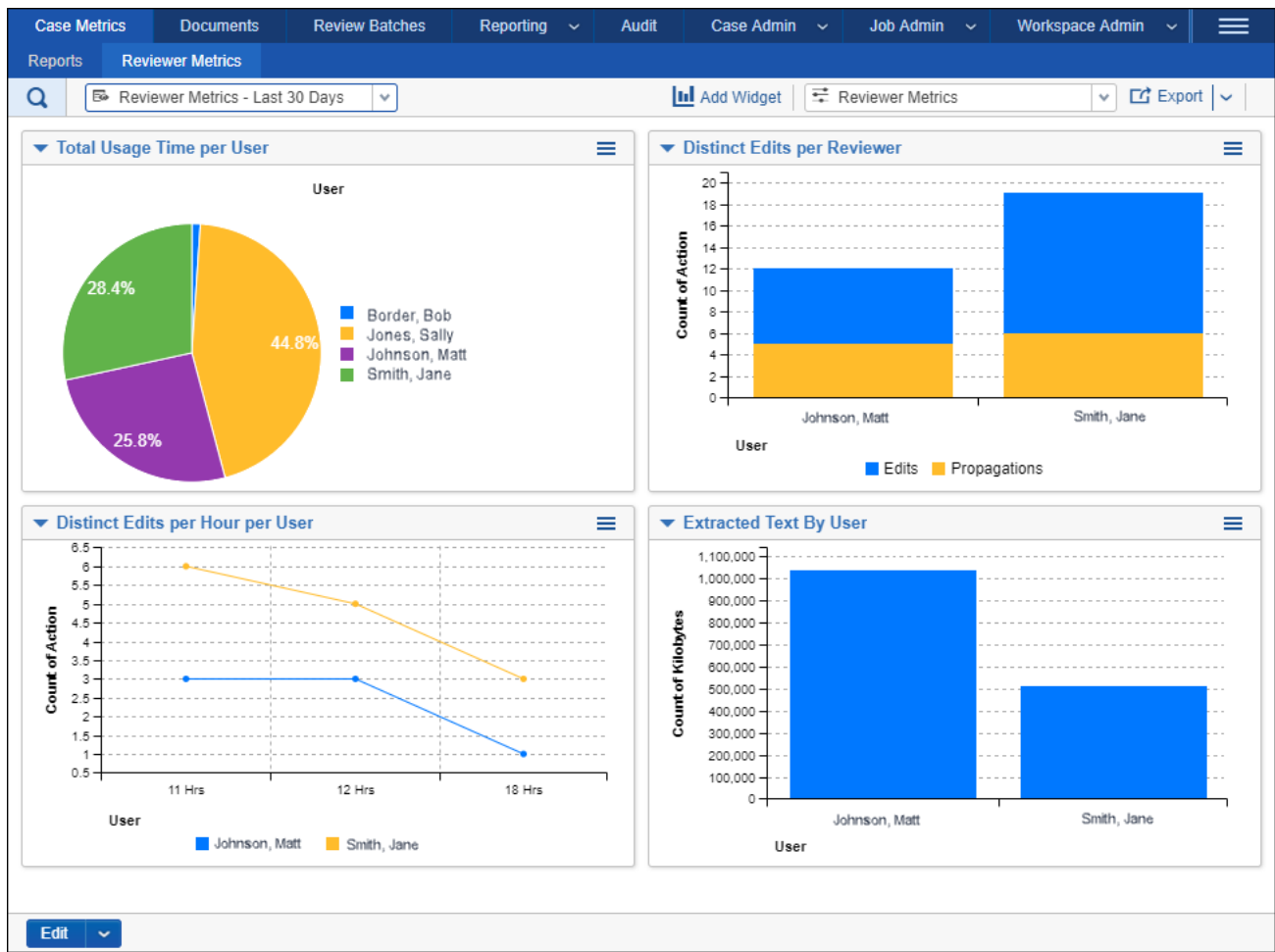
Document Identifier	Original Coding Value	New Coding Value	Overturned By	Date
(All)	(All)	(All)	(All)	(All)
AZIPPER_0007491	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
AZIPPER_0007494	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
AZIPPER_0007293	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
AZIPPER_0007299	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
AZIPPER_0007300	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
IconicTxI	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
IconicTxTTest	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
Excel file test 1	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
Exploratory Test Cases Template	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM
AZIPPER_0007291	Needs Further Review	Responsive	Medrano, Cynthia	4/12/2018, 11:50 AM

Close

- **% Overturn** - calculates the percentage of documents overturned.

1.5 Reviewer Metrics dashboard

Beginning in January 2018, you can leverage the Reviewer Metrics dashboard on the Reviewer Metrics tab at the workspace level, to help analyze results from the Reviewer Statistics Report. You can also obtain a high-level view of the health of your workspace and what your reviewers are experiencing from the dashboard. The dashboard is included by default; you do not have to install or create it.



Note: The Reviewer Metrics dashboard works with Relativity Data Grid and SQL server databases.

The Reviewer Metrics dashboard consists of 4 interactive and customizable, reviewer performance widgets:

- **Total Usage Time per User** - a graph showing the percentage of time a user spent completing Edit, Mass Edits, and/or Propagation actions during the specified period. The widget rounds to the nearest hour.
- **Distinct Edits per Hours per User** - a graph showing the number of distinct edits a user completes each hour. The results are calculated using the average number of documents reviewed at each specific hour over the course of the specified time. The time is reflected in military time. For example, in the image above, at 18 hours (or 6 P.M.), Jane Smith edited an average of 3 documents
- **Distinct Edits per Reviewer** - a graph showing the number of distinct edits a reviewer makes.
- **Extracted Text by User** - a graph showing the average file size of documents edited by the reviewer. The file size is measured in kilobytes.

When you hover your mouse over a slice on a widget, that slice's information appears. You can edit the widgets and create new dashboards based on the information. For more information, see the Admin Guide.

The Reviewer Metrics tab contains 5 views, which specify what time period the widgets pull their data from. Views include:

- **Reviewer Metrics – This Week** - a view that displays data from the current week beginning on Sunday.
- **Reviewer Metrics – This Month** - a view that displays data for the current month.
- **Reviewer Metrics – Last Week** - a view that displays data for the 7 day period that ended 7 days ago.
- **Reviewer Metrics – Last 7 Days** - a view that displays data from the last 7 days.
- **Reviewer Metrics – Last 30 Days** - a view that displays data from the last 30 days.

You can create new views and use conditions to further filter down results. For more information, see the Admin Guide.

1.6 Using the Scheduler

With the Case Metrics Scheduler, you have the ability to run reports at scheduled intervals and send those reports to a list of recipients.

Beginning in 9.6.134.78, you can use the Case Metrics Scheduler to run reports at scheduled intervals and send those reports to a list of recipients.

Notes:

- The Scheduler only works at the instance level. It does not work at the workspace level.
 - The scheduled report is sent as an attached PDF file in an email.
 - The Scheduler will not send a report if there is no data for the date range selected.
-

To create or edit a scheduled report:

1. Navigate to the **Scheduler** tab.
2. Click **New Schedule** or edit an existing schedule.
3. Complete the fields in the Scheduled Report layout. See [Scheduled Report layout fields on the next page](#).
4. Click **Save**. The report is scheduled to send.

The screenshot shows a configuration window for a scheduled report. At the top right, there are 'Save' and 'Cancel' buttons. The window is divided into two main sections: 'Schedule Information' and 'Recurrence Settings'.
In the 'Schedule Information' section, there is a 'Name' field containing 'Salt V Pepper 2018' and a 'Next Scheduled Run Time' field. Below this, the 'Report Type' is set to 'All', with three unchecked checkboxes for 'Reviewer Choices', 'Reviewer Statistics', and 'Reviewer Overturns'.
In the 'Recurrence Settings' section, the 'Range' is set to 'No End Date' and the 'Frequency' is set to 'Daily'. The 'Run Time' is set to '9:00 AM'.

1.6.1 Scheduled Report layout fields

1.6.1.1 Schedule Information

The Schedule Information section has the following fields:

- **Name** - enter the name of the scheduled report.
- **Report Type** - select which report(s) you want to include in the scheduled report.
- **Email Recipients** - enter the emails of the list of recipients.

Depending on which report(s) you select, you will have to complete the fields that appear for each report type. For more information see the following reports:

- [Reviewer Choices Report on page 10](#)
- [Reviewer Statistics Report on page 11](#)
- [Reviewer Overturn Report on page 14](#)

1.6.1.2 Recurrence Settings

1. **Range** - select the time range for which you would like to run the scheduled report, including No End Date, Fixed Number of Occurrences, or Fixed End Date.
2. **Frequency** - Select how often you would like to run the scheduled report from five frequencies, including Daily, Weekly, Biweekly, Monthly, and Yearly.
3. **Scheduled Time** - Select the specific time at which you would like to run the report. This time is synchronized with the Scheduler Dispatcher agent's date and time.

Proprietary Rights

This documentation (“**Documentation**”) and the software to which it relates (“**Software**”) belongs to Relativity ODA LLC and/or Relativity’s third party software vendors. Relativity grants written license agreements which contain restrictions. All parties accessing the Documentation or Software must: respect proprietary rights of Relativity and third parties; comply with your organization’s license agreement, including but not limited to license restrictions on use, copying, modifications, reverse engineering, and derivative products; and refrain from any misuse or misappropriation of this Documentation or Software in whole or in part. The Software and Documentation is protected by the **Copyright Act of 1976**, as amended, and the Software code is protected by the **Illinois Trade Secrets Act**. Violations can involve substantial civil liabilities, exemplary damages, and criminal penalties, including fines and possible imprisonment.

©2020. Relativity ODA LLC. All rights reserved. Relativity® is a registered trademark of Relativity ODA LLC.