



# MaxBilling

## Release Notes

Date	Version	Type	Features	Description
01/09/2019	2.3.1301.101	Fix	Case Flow Statistics collection	Allowing “-” symbol in workspaces’ name.
01/04/2019	2.3.1301.98	Fix	Processing report generation	Removed check for Custodian table when collecting information for processing billing items.
11/29/2018	2.3.1301.85	New feature	New Pricing Item under Case Flow category – Production branding	The count of the production brands per page.
11/29/2018	2.3.1301.85	New feature	New Pricing Item under Case Flow category – ECA Promotion File Size (Inbound)	File size of the documents promoted from one workspace to another workspace via RIP.
11/29/2018	2.3.1301.85	New feature	New Pricing Item under Case Flow category – ECA Promotion File Count (Inbound)	File count of the documents promoted from one workspace to another workspace via RIP.
11/29/2018	2.3.1301.85	New feature	New Pricing Item under Case Flow category – RDC Import File Size	File size of the documents (images or natives) imported via RDC (Image Load File, Document Load File, Production Load File).
11/29/2018	2.3.1301.85	New feature	New Pricing Item under Case Flow category – RDC Import File Count	File count of the documents (images or natives) imported via RDC (Image Load File, Document Load File, Production Load File).
11/29/2018	2.3.1301.85	Optimization	OCR and Imaging category is renamed to Case Flow	OCR and Imaging pricing item category is renamed to Case Flow.
10/19/2018	2.3.1301.53	Optimization	Agents	A retry policy with default values seconds intervals for



				MaxBilling Agents functionality is implemented.
10/19/2018	2.3.1301.53	Optimization	Report Generation consistency	The ability to include more than one report breakdown on report generation is restricted.
09/20/2018	2.3.1301.44	Optimization	Reviewers Pricing Items Category	Reviewers Pricing Items Category is temporary removed.
09/20/2018	2.3.1301.44	New feature	SalesForce data tier synchronization	Data tier value in MaxBilling settings is synchronized by "MaxBilling SalesForce Data Tier Syncer Agent" according to the information in Salesforce Data Contract. (available in RelativityOne only)
8/10/2018	2.3.1301.21	New feature	New Invoicing functionality	Ability to generate manually and automatically customizable invoices based on the billing reports using mappings and templates.
8/10/2018	2.3.1301.21	New feature	New Pricing Item – Production Set File Size	The file size of the produced documents.
8/10/2018	2.3.1301.21	New feature	New Pricing Item – Production Set File Count	The file count of the produced documents.
8/10/2018	2.3.1301.21	New feature	New Pricing Item – Image File Size	The size of completed Imaged documents.
8/10/2018	2.3.1301.21	New feature	New Pricing Item – Image File Count	The count of completed Imaged documents.
8/10/2018	2.3.1301.21	New feature	New Pricing Item – OCR File Size	The size of text of completed OCR files.
8/10/2018	2.3.1301.21	New feature	New Pricing Item – OCR File Count	The count of completed OCR files.
8/10/2018	2.3.1301.21	New feature	New Pricing Item Category – OCR and Imaging	OCR and Imaging pricing category is available in all MXB reports.
4/28/2018	2.2.1301.113	New feature	New Pricing Item – Case Rollup - Stage Fence Data File Size	The peak size of the Stage Fence. (available in RelativityOne only)
4/28/2018	2.2.1301.113	New feature	New Pricing Item – Case Rollup - Publish Data File Size	The peak size of the Published files.



4/28/2018	2.2.1301.113	New feature	Billing Profile Name restrictions	The following symbols are not allowed in a billing profile name any more: "+", "!", " ", "/", "\", "[", "]", "\", "&", "<", ">", "{", "}", "%", "^, ~", "@".
4/16/2018	2.2.1301.109	New feature	New Pricing Item - Case Rollup - Full Text Data File Size	The size of the Full Text catalog.
3/15/2018	2.2.1301.96	Fix	Publish Data Usage Dashboard Peak	Change in calculating the peak for Publish Data Usage to be displayed in the dashboard.
3/15/2018	2.2.1301.96	New feature	New field in Users category pricing items - Priority Order	When a user is part of more than one user charge, they will be charged based on the one with the highest priority.
3/15/2018	2.2.1301.96	New feature	New field in Users category pricing items – Groups Filter Behavior	When groups are selected in users charge, the users in this groups will be included/excluded based on the selected Groups Filter Behavior.
3/15/2018	2.2.1301.96	New feature	New pricing type - Exclude Workspaces	Exclude Workspaces allows you to select multiple Workspaces that will not be included in the generated reports and neither of the other pricings will be applied to them.
3/15/2018	2.2.1301.96	New feature	New Excel version of billing reports - ExportData	ExportData file is a specific Excel version of MaxBilling reports which is suitable for importing in other systems.
3/15/2018	2.2.1301.96	New feature	New fields in Pricing Item details	New fields in Pricing Item details are available for specifying – E-Code and Cost Code.
1/25/2018	2.2.1301.85	New feature	Case Rollup items - Charge Level – Instance Peak	Instance Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level.

				<ul style="list-style-type: none"> <li>Instance Peak – specifies that when a report is generated, the usage for the item will be considered from the date when was the max value for the item for all Workspaces in the whole Relativity combined (for the billing period)</li> </ul>
1/25/2018	2.2.1301.85	New feature	Case Rollup items - Charge Level – Client Peak	<p>Client Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level.</p> <ul style="list-style-type: none"> <li>Client Peak - specifies that when a report is generated, the usage for the item will be considered from the date when was the max value for the item for all Workspaces for the Client combined (for the billing period)</li> </ul>
1/25/2018	2.2.1301.85	New feature	Case Rollup items - Charge Level – Matter Peak	<p>Matter Peak choice for the Single-Choice field for Case Rollup pricing item – Charge Level.</p> <ul style="list-style-type: none"> <li>Matter Peak - specifies that when a report is generated, the usage for the item will be considered from the date when was the max value for the item for all Workspaces in the Matter combined (for the billing period)</li> </ul>
1/25/2018	2.2.1301.85	New feature	Case Rollup items - Charge Level – Workspace Peak	<p>Workspace Peak choice for the Single-Choice field for</p>

				<p>Case Rollup pricing item – Charge Level.</p> <ul style="list-style-type: none"> <li>• Workspace Peak – specifies that when a report is generated, the usage for the item will be considered from the date with the max value for the item for the Workspace (for the billing period)</li> </ul>
1/25/2018	2.2.1301.85	New Feature	New Report type - Instance	MaxBilling users are able to generate Instance reports. Instance breakdown can be included only for Instance reports.
1/25/2018	2.2.1301.85	New Feature	New Profile type - Instance	Now MaxBilling users are able to create Instance reports. This will allow them generate reports with accumulated billing information for the whole instance.
1/25/2018	2.2.1301.85	New Feature	New Breakdown - Instance	Along with Workspace, Matter and Client breakdowns, MaxBilling users will be able to generate reports with Instance breakdown of the reported items.
1/25/2018	2.2.1301.85	New Feature	Detailed Excel Report	Along with PDF and summarized Excel, now the generated reports are available in Detailed Excel. There all reported items are listed with the usage, calculation and their additional information.
11/24/2017	2.2.1301.70	Optimization	Data Tier	Added fields to Data Tier RDO to contain information about the user/service that last updated it, when it was updated and current status message.



11/24/2017	2.2.1301.70	Optimization	Report Files	All generated report files are combined in one ZIP
11/3/2017	2.2.1301.57	New Feature	Report Generation	Providing the user with the ability to select which breakdowns they want to be included in the generated report.
11/3/2017	2.2.1301.57	Optimization	Report PDF	The report represented in PDF shows breakdown by Client.
11/3/2017	2.2.1301.57	Fix	Stage Fence Dashboard	The charge free limit of Stage Fence Data equals the Subscribed Data tier * 5 as it is required.
10/16/2017	2.2.1301.49	Known Issue	Stage Fence Dashboard	The chargefree limit of Stage Fence Data equals the Subscribed Data tier. This should be Subscribed Data Tier*5
10/16/2017	2.2.1301.49	Optimization	Published Data Dashboard	The peak value in Published Data Dashboard now considers only billable file sizes and is based on environment peaks, not Workspace peaks)
10/16/2017	2.2.1301.49	Optimization	Pricing Items are RDOs	The pricing items are no longer Choices, but RDOs that are selected as Single Object. As such they have additional information for the user: Friendly Name, Billing Code, Description
10/16/2017	2.2.1301.49	New Feature	Metadata for Pricing Items	When selected, pricing item metadata is visible in the layout as well
10/16/2017	2.2.1301.49	Optimization	New filters and charge levels for Users	We have added two levels of filtering (Relativity User Type and Groups) when adding Users Pricing Item and three charge levels (Per Workspace, Per Matter and Per Client)



10/16/2017	2.2.1301.49	Optimization	New charge level for Tasks	Charge level is added also to Tasks Pricing Item
10/16/2017	2.2.1301.49	New Feature	Logo for report	When generating the report, user will be able to select a logo that will be added in the generated PDF report
10/16/2017	2.2.1301.49	New Feature	New report breakdowns	Now the report is generated with breakdown on: Workspace, Matter and Client
10/16/2017	2.2.1301.49	Optimization	New Processing reports	Now there are three levels of Processing reports – Summarized, Detailed (based on Processing set), Detailed (based on Processing Data Source)
10/16/2017	2.2.1301.49	New Feature	New tab in Settings – Pricing Item Type	Now MaxBilling users will be able to specify and edit Pricing Item metadata
7/30/2017	2.0.1301.215	Fix	Fixed Stage Fence Current and Peak values in Dashboard	Fixed issue in gathering Stage Fence Current and Peak values
7/7/2017	2.0.1301.211	Security optimization	Access Denied for download buttons	Users that are not members of the administrative billing Workspace, where MaxBilling is installed, cannot download MaxBilling reports using the download URL
6/27/2017	2.0.1301.209	Optimization	Removed trigger on AuditRecord_PrimaryPartition	Beginning in 2.0.1301.209, MaxBilling application no longer has a trigger on AuditRecord_PrimaryPartition that deletes MaxBilling audits for SELECT queries
4/4/2017	2.0.1301.188	New Functionality	Staging Data and Production Data Dashboard	Beginning in 2.0.1301.188, MaxBilling contains new tab Usage Information that shows Staged and produced data in charts.



3/8/2017	2.0.1301.178	New Functionality	Two report types	Beginning in version 2.0.1301.178, MaxBilling users will be able to generate two different report types – Single report for multiple clients and Multiple reports for a single client
3/8/2017	2.0.1301.178	Enhancement	New columns in the generated reports	There are three new columns added to the Workspace Breakdown in the generated reports: Client Name, Matter Name, Workspace ID
2/21/2017	2.0.1301.164	New Functionality	MaxBilling Scheduler	Beginning in version 2.0.1301.164, MaxBilling Scheduler is part of MaxBilling application.
2/21/2017	2.0.1301.164	Optimization	MaxBilling Agents	MaxBilling agents are optimized to be more resistant to environment issues
2/9/2017	2.0.1301.156	Enhancement	Billing profile types	Beginning in version 2.0.1301.156, MaxBilling users can set one profile for multiple/all clients
2/9/2017	2.0.1301.156	Enhancement	Consistency Checker	Profile Consistency Checker agent is adapted for the new profile types