

## MATTER ADMINISTRATION

**Matter Details**

- Case Number: 2021-1
- Abbreviation: Tyche
- Date Added: 6/25/2021
- Plaintiff: Wiley Coyote
- Defendant: Acme Products
- Matter Details: Case Name - Wiley vs Acme Products (VC vs AP), Case Number - 12345678
- Matter Counsel: Joseph Grant (Plaintiff), Carrie Newsom (Defendant)

**Matter Configuration**

- Matter Details
- Survey Disclaimer & Time Frame
- Data Source Burden Group Details
- Data Source Status Definitions
- Custodian Status Definitions
- Report Scheduler

**Matter Custodians**

Buttons: Select Survey, Create Assessment, Add Custodians

### MATTER SETUP

The matter setup section requires configuration of settings, values and rules used throughout the EO workflow.

The first section identifies:

1. Matter Details
2. Matter Counsel
3. Matter Configuration
4. Matter Survey
5. Assessment Configuration
6. Matter Custodians

### MATTER CONFIGURATION

The Matter Configuration section captures the configuration settings that drive the rules of the EO workflow.

1. Survey Disclaimer and Matter Time Frame
2. Data Source Burden Group Details: includes Burden Groups, Data Source Ranks and Cost Estimates
3. Data Source Status Definitions
4. Custodian Status Definitions
5. File Uploads
6. Report Scheduler

**Data Source Burden Groups**

- Headquarters Office
- Satellite Office

**Cost Estimates**

Data Source Type	Rank	Low	Medium	High
Cloud Based Applications	2	\$450	\$500	\$550
Collaboration	3	\$675	\$750	\$825
Computer	4	\$540	\$600	\$660
Email	1	\$900	\$1,000	\$1,100
Hard Dr		\$1,000	\$1,100	\$1,200
Mobile		\$750	\$825	\$900
MS Exchange	1	\$675	\$750	\$825
Network Drive	2	\$1,050	\$1,150	\$1,250

## ASSESSMENT INTERVIEW CONFIGURATION

**Assessment Questions**

1. Question: "Were you employed by Tyche during the relevant time period?"
2. Question: "Were you involved in any of the scientific aspects pertaining to patent research, preparation and filing relating to the compound 'Epicortone-dipyr'?"
3. Question: "Can you confirm if any of the work you performed involved the research, development, clinical testing or manufacture for the compound 'Epicortone-dipyr'?"
4. Question: "Were you involved in any business development sales, marketing to MedPharma's compound named 'MedPharma-dipyr'?"

**Scoring Settings**

Retain/Release Settings

Retain Configuration Settings

Condition Sets

Define Condition Rules

### ASSESSMENT CONFIGURATION

The Assessment configuration includes settings and rules for the proper execution of the Assessment and Custodian Ranking:

1. Create Assessment questions
2. Score and prioritize each question
3. Set question override if appropriate
4. Set Retain rules and conditions
5. Set Release rules and conditions
6. Select appropriate scoring methodology

**Scoring Settings**

**Weighted Average Scoring**

With this option, the system will total the values of the ratio scores and divide the result by the total possible.

Example: Questions with a max score of 4 will receive a total possible of 16. (Max rank score of 4 x 4 questions)

The percentage of the total that will be fit into the range match to get the customer's score.

0%	to 25%	= Rank of 1
25%	to 50%	= Rank of 2
50%	to 75%	= Rank of 3
75%	to 100%	= Rank of 4

**Manual Range**

With this option, you define the range of values that will be used to provide the proportional ranking. The result of the total scores selected will be calculated and fit into the range you specify.

Max points possible when all answered:

Low	to	High
Rank 1	to	
Rank 2	to	
Rank 3	to	
Rank 4	to	