

## HOMEPAGE

The homepage displays a navigation bar at the top with icons for Home, Evaluation, PDA, Data Sources, Setup, and Account. Below the navigation bar is a 'Matter' selector dropdown set to 'Superior Pharmaceuticals, Inc. vs. MedPharma, Inc.'. The main content area includes:

- Custodian Rank:** A list of ranks: Priority = 6, High = 8, Medium = 6, Low = 12, Released = 11.
- Custodian Evaluation Status:** A donut chart showing 66 Custodians. Legend: Survey (42 / 56), Analysis (25 / 56), Assessment (42 / 56), Interview (27 / 56), Incomplete.
- Proportional Discovery Assessment:** A table showing costs for All Custodians, Approved Data Sources, Collected Data Sources, and Cost Savings - Approved Data Sources.
- Source Count by Custodian Rank:** A horizontal bar chart showing the number of data sources for each rank across various categories like Social Media, Email, etc.

**HOMEPAGE**

- The site navigation bar provides access to all other sections of the system.
- Directly under the navigation bar is the Matter selector to select the matter you require.
- The center of the page contains the Dashboard Reports including:
  - Custodian Ranks
  - Status of the Evaluation stages
  - PDA Cost estimates for Collection
  - Data Source Collection Status

Navigation Bar  
Choose Matter  
Dashboard

**Key**

- Not Available
- Available, Not Complete
- Complete
- Released

**Stage**

Search by Last Name:	Hold Issued	Hold Accepted	Survey Status	Assessment	Analysis	Interview	Data Sources	Custodian Rank	Custodian Report
Abbott, Andre	○	○	○	○	○	○	0		0
Alison, Ainsley	○	○	○	○	○	○	2		2
Allegiance, Grace	○	○	○	○	○	○	0		0
Armondo, Abraham	○	○	○	○	○	○	0		0
Ashley, Michelle	○	○	○	○	○	○	6		6
Baldy, Dwight	○	○	○	○	○	○	2		2
Bartlett, David	○	○	○	○	○	○	0		0
Bartlett, Jeannerose	○	○	○	○	○	○	4		4
Batista, Mario	○	○	○	○	○	○	2		2
Beschly, Mark J.	○	○	○	○	○	○	2		2

**Custodian**

**Status**

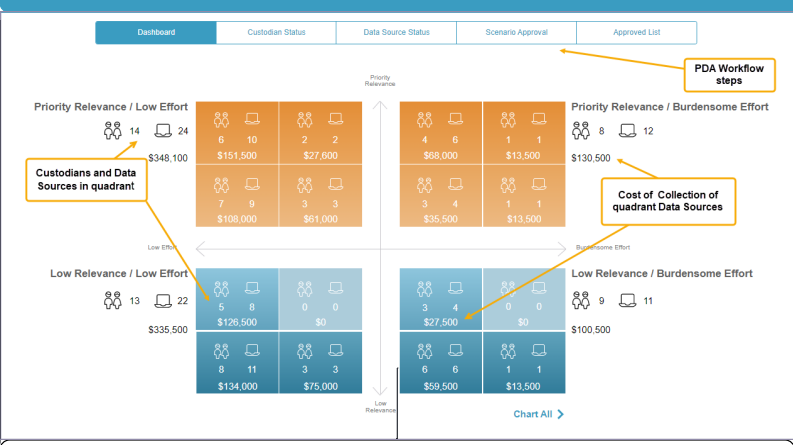
## EVALUATION

**EVALUATION**

Provides access to the initial Survey and Interview sections of the EO Workflow.

- The colored icons note the status of each step. Clicking them takes you to that section.
- The Data Sources icon notes the number of Data Sources identified for each custodian.
- The Custodian Rank is the Rank assigned to the Custodian based on the Assessment Interview.
- The Custodian Report provides a brief fact sheet on each custodian including, address, job title and status of each Evaluation stage.

## PROPORTIONAL DISCOVERY ASSESSMENT (PDA) HEATMAP



**PDA Workflow steps**

- Total Data Sources: Collected vs Not Collected:** Donut chart showing Computer (2), Email (6), Network Share (2), and Not Collected.
- Data Sources by Location:** Map of the United States showing locations of data sources in the quadrant.
- Data Source Cost Estimate:** Bar chart showing Approved and Not Approved costs across Custodian Relevance levels.
- Data Source List:** Table listing Custodian Name, Job Title, Department, City, State, Status, Category, and Effort.

**PROPORTIONAL DISCOVERY ASSESSMENT**

Presents a clear picture of the priorities for Custodian Data Sources collection.

- The X axis represents the Data Source Burden Rank.
- The Y axis represents the Custodian Rank.
- Reading from top to bottom, left to right, the custodians in the far left, top quadrant are the highest priority and their Data Sources are the least burdensome. In the example, there are 6 custodians and 16 Data Sources in that quadrant.
- The icons to the left/right represent all of the custodians and Data Sources in that quadrant (highest, high priority/low or medium burden).

Click on the quadrants on the Heatmap and drill down for additional data on the Custodians and Data Sources in that quadrant.

- A chart depicting the **Collection Status** by Data Source type.
- A map identifying each state where Data Sources are located.
- A bar graph showing the overall collection costs broken out by **Approved** or **Not Approved** Data Sources.
- A complete list of all the Custodian Data Sources, their Rankings and their locations.