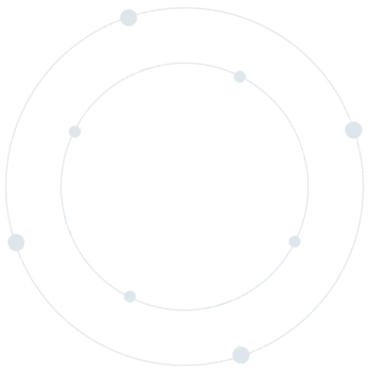




  
cloudnine™  
REVIEW

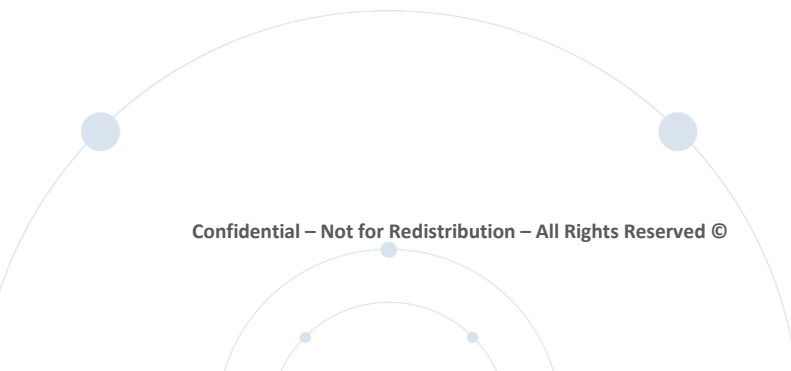
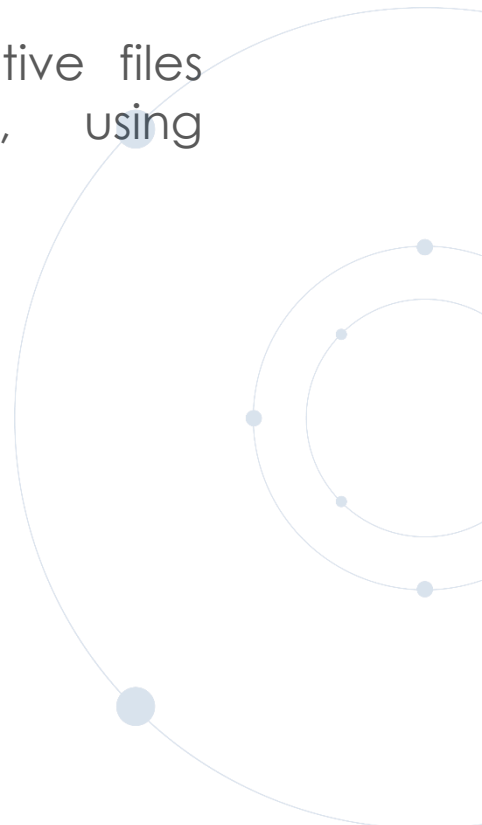
CloudNine Discovery Portal  
Quickstart Guide



# cloudnine<sup>TM</sup> REVIEW



Complete guide to uploading native files  
directly to CloudNine Review, using  
CloudNine Discovery Portal



## Welcome to CloudNine Discovery Portal

CloudNine Discovery Portal is a new Client Portal, add-on to CloudNine Review, allowing clients to upload their own Native data into new or existing projects, without having to mail data to CloudNine Client Services, or FTP to our servers. Streamline your case to the review process in 3 simple steps:

- Upload native files to CloudNine Discovery Portal
- Process native files (including OCR)
- Produce document database for review

### Before You Start:

Assess your data before uploading to Discovery Portal to estimate project timing.

- How large is the file you are trying to send?
- What is your internet speed?
- Are you using a 32-bit or 64-bit Operating System?

Regardless of your system settings, only a valid internet connection is needed to upload your data. However, the speed of your connection will determine how long your upload will take. For example, if a 10-gigabyte data set takes a few hours to upload, then a 150-gigabyte data set could take more than a day. It is best to start with a small data set to gauge your own upload speed. As always, you can send large data sets to us for processing and upload if desired.

**NOTE:** CloudNine Discovery Portal is designed as an automated process, to handle select types of data and file formats using standard processing specifications. The platform is not recommended for ALL projects or ALL data sets or file types, but specifically for projects and data sets and types which DO NOT require manual file handling or special processing requirements. If your data requires manual processing or special processing requirements, please contact CloudNine for a quote on our Client Services processing.

## Prepare your Data for Upload

The first step to uploading your native data with CloudNine Discovery Portal is to gather it in one place and organize your data into a dedicated folder(s) with manageable file sizes.

- Single folder: Up to 10-gigabyte total data size
- Multiple folders: Up to 40 gigabytes of total data to upload in batches

If you have 200+ gigabytes of data, you may want to send it to us on a hard-drive and let us load the data for you.

CloudNine Discovery Portal has two uploading options:

- Uploading a Folder
- Uploading a Compressed File

If you have a set of documents already compressed in a single archive file (such as a .ZIP, .RAR, or .TAR), you can load those into CloudNine Discovery Portal as is.

If you have a large volume of raw collected data, you can upload it in folder form. This can be extremely useful, as CloudNine Review has a Tree View function, which follows the file path of documents through Folders and subfolders, providing you can group documents by Custodian or Reviewer. Folders can be created in your original data to separate certain groups of documents before upload to help filter documents later.

**NOTE:** CloudNine Discovery Portal supports a very wide variety of File Formats. Please see our current official list of Supported File Formats at the end of this document\*\*

# Installing the Portal into CloudNine Discovery

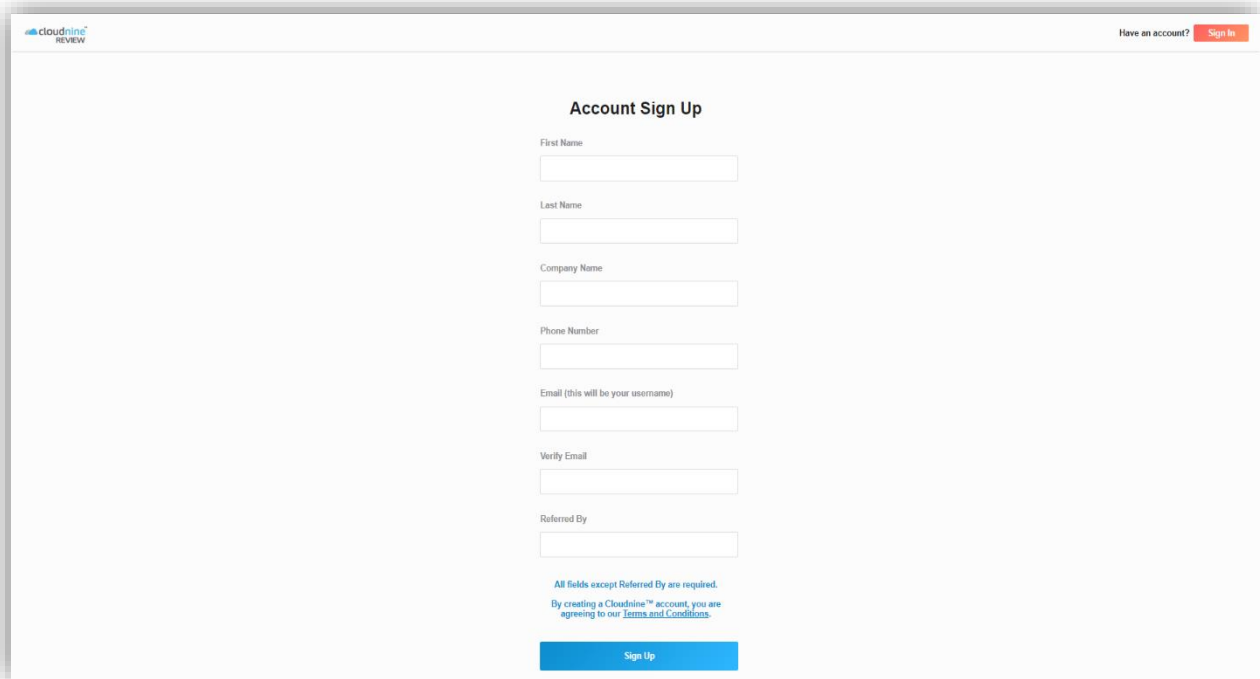
**IMPORTANT: The Portal currently is only supported on Windows Based Machines**

**Step 1.** After preparing your Dataset for upload, access the CloudNine Discovery Portal at:

<https://review.CloudNine.com/login/signup.aspx>

**Step 2.** Login or create a new account:

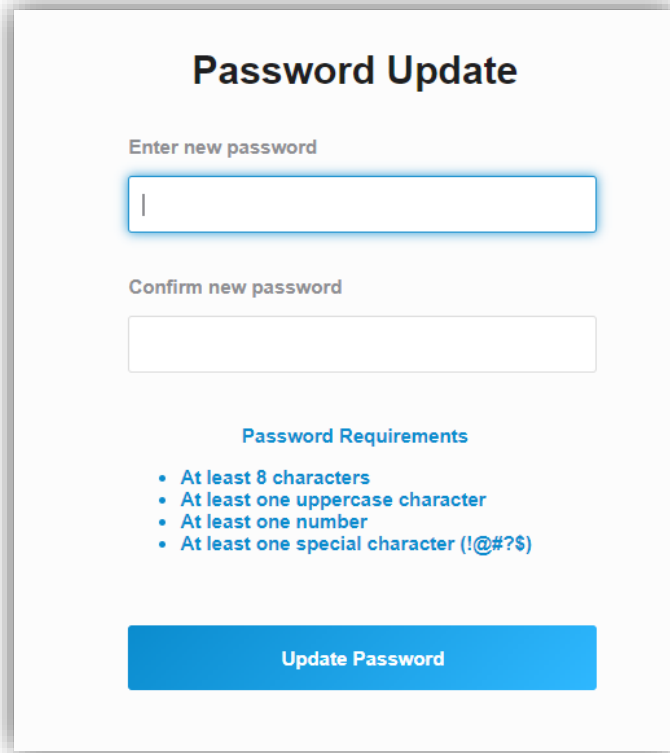
- **Existing Clients:** Sign In (upper right corner) with your standard login and kip to Step 4.
- **New Users:** Fill out the required information on the Free Account Signup page, then check your email for a temporary password.



The screenshot shows the 'Account Sign Up' page on the CloudNine Review website. The page has a white background with a blue header containing the 'cloudnine review' logo on the left and 'Have an account? Sign In' on the right. The main content area is titled 'Account Sign Up' and contains several input fields: 'First Name', 'Last Name', 'Company Name', 'Phone Number', 'Email (this will be your username)', 'Verify Email', and 'Referred By'. Below the fields, there is a note: 'All fields except Referred By are required. By creating a CloudNine™ account, you are agreeing to our Terms and Conditions.' At the bottom of the form is a blue 'Sign Up' button.

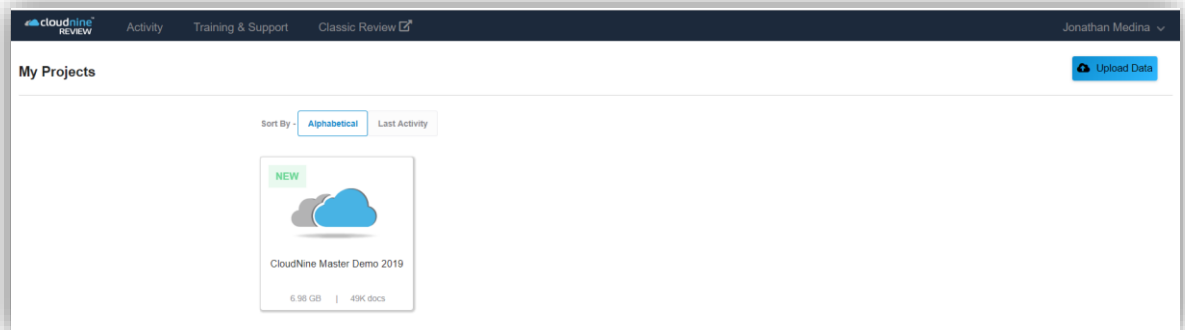
**NOTE:** If you do not receive an email with a temporary password, please check your Spam filter. If you still have not received a password, contact Technical Support.

**Step 3.** Upon logging in the first time, you will be prompted to change your password. Please fill out the form, change your password, and set a security question. This question will be used to verify your identity when contacting Technical Support. You must also accept our Master Services Agreement to continue.

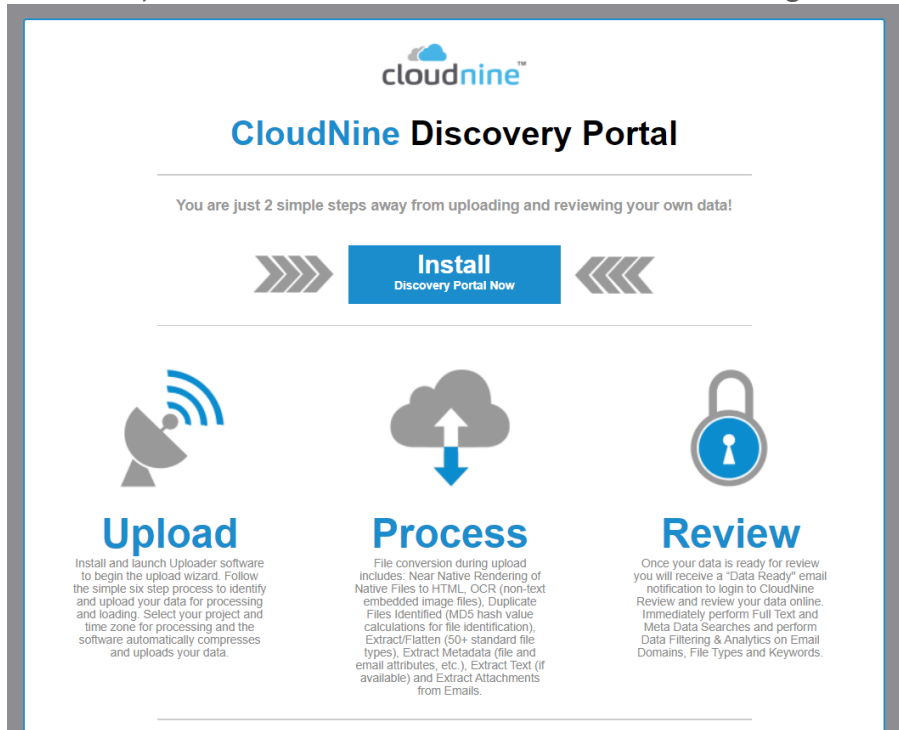


The screenshot shows a 'Password Update' form. At the top, the title 'Password Update' is centered. Below it, there are two input fields: 'Enter new password' and 'Confirm new password'. Underneath these fields, a section titled 'Password Requirements' lists four bullet points: 'At least 8 characters', 'At least one uppercase character', 'At least one number', and 'At least one special character (!@#?\$)'. At the bottom of the form is a blue button labeled 'Update Password'.

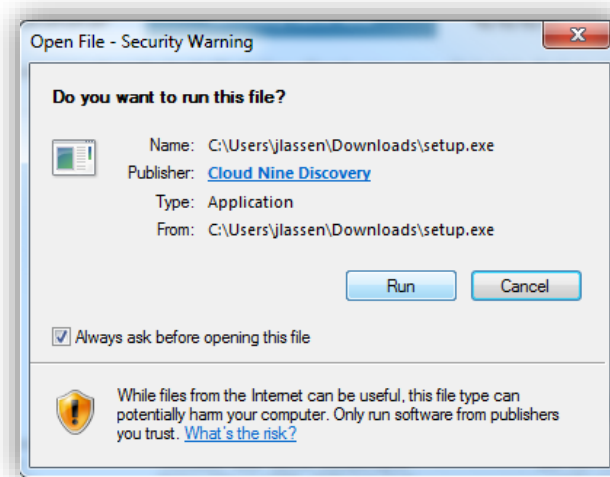
**Step 4.** Upon successful login, click the Upload data button located at the top right of the screen, right under your Account username. This will bring up the Client Installer Page.



**Step 5.** Click Install on the Portal Installer page, which will download a file called, Setup.exe. Depending on your browser, the download may show in different places. (This is in Google Chrome.) Run the Installer when it is finished Downloading.



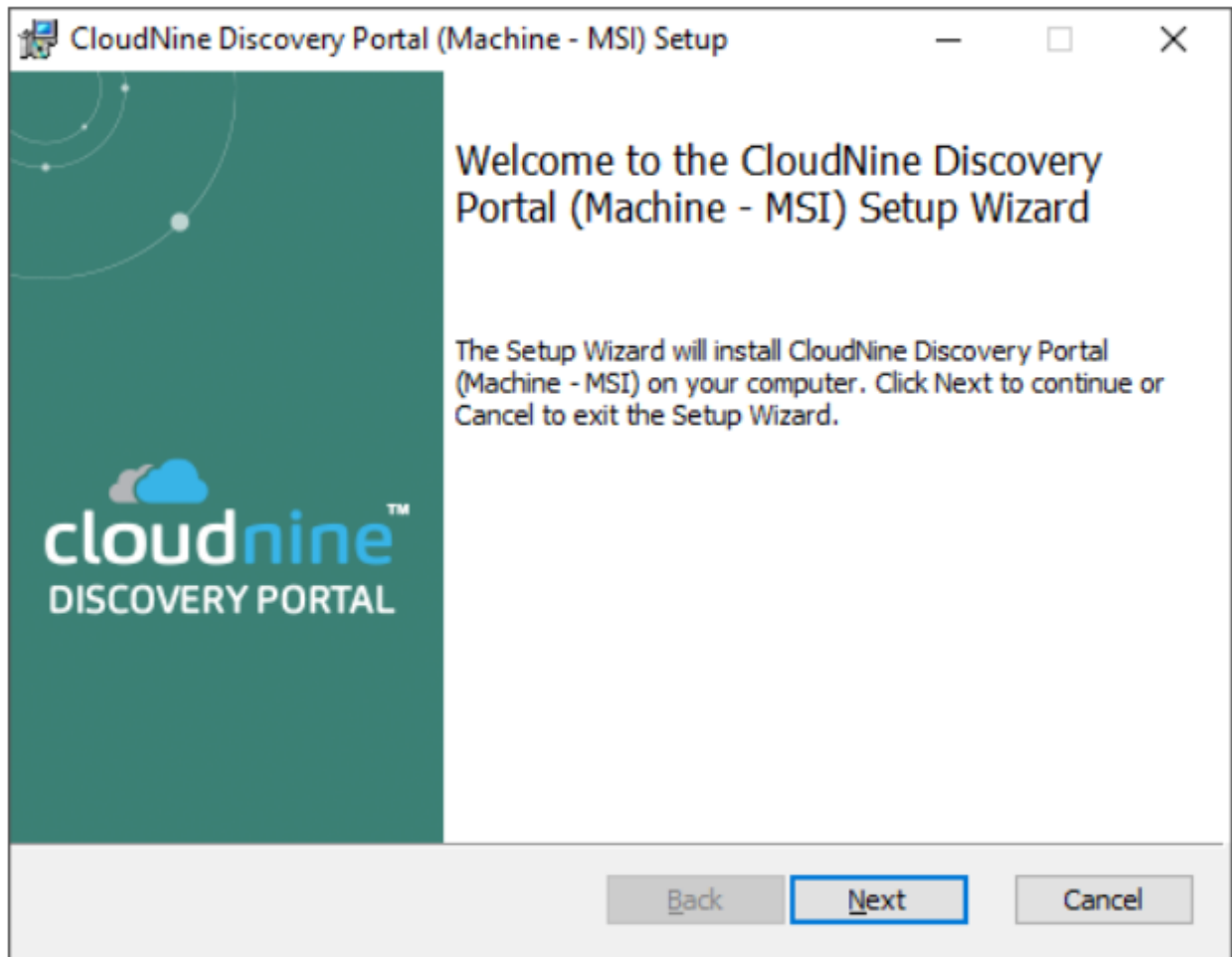
**Step 6.** (Optional) If your machine prompts you for a security warning, select Run.




**Step 7.** The Uploader will open automatically, and you are ready to Upload your data.

**Step 8.** Start by running the **Discovery Portal** MSI installation file as an administrator (right-click > Run as administrator). Click **Yes** when prompted to allow the app to make changes to your device.

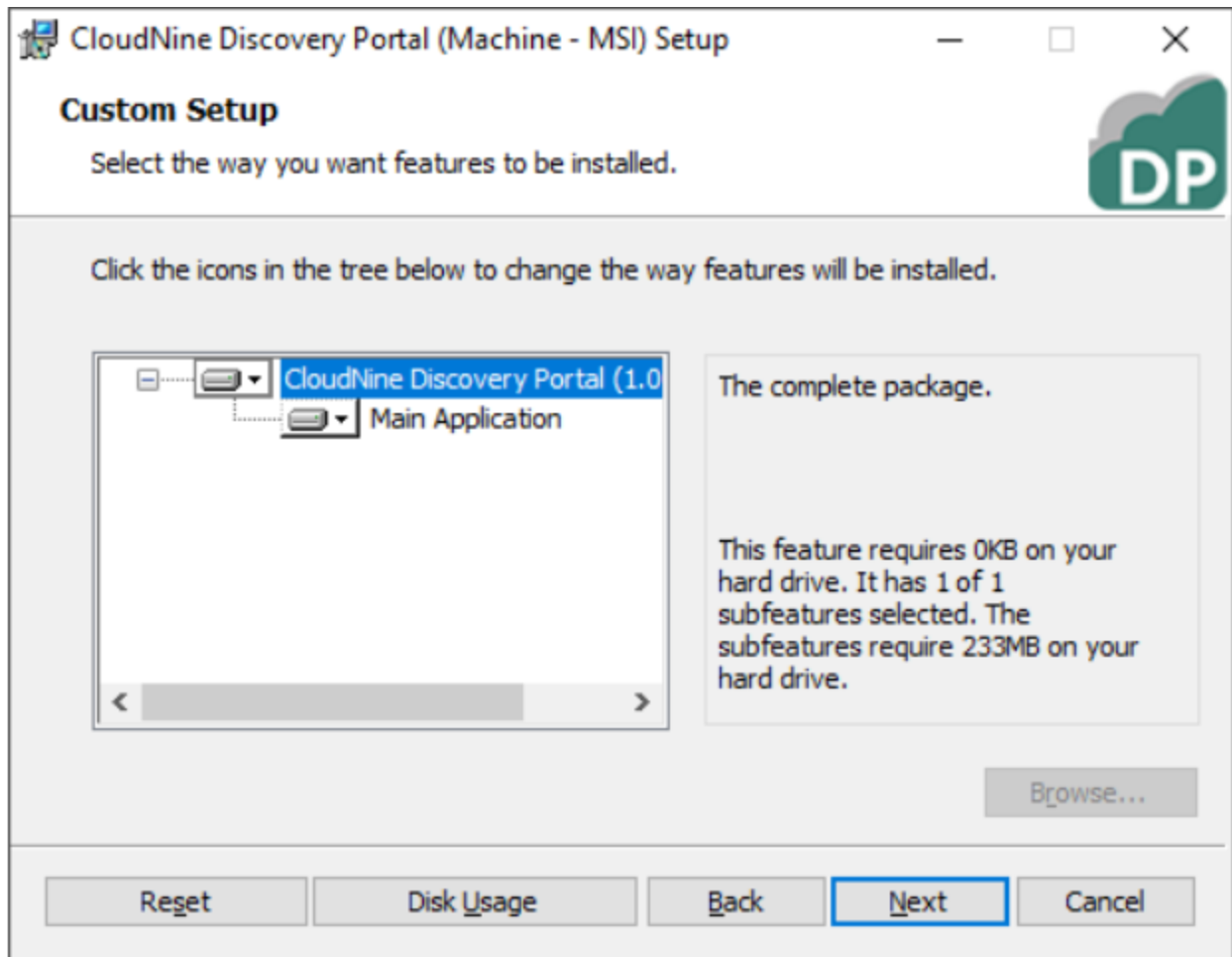
**Step 9.** The **Setup Wizard** will open, and you will be brought to the **Welcome** screen. Click **Next** to proceed.



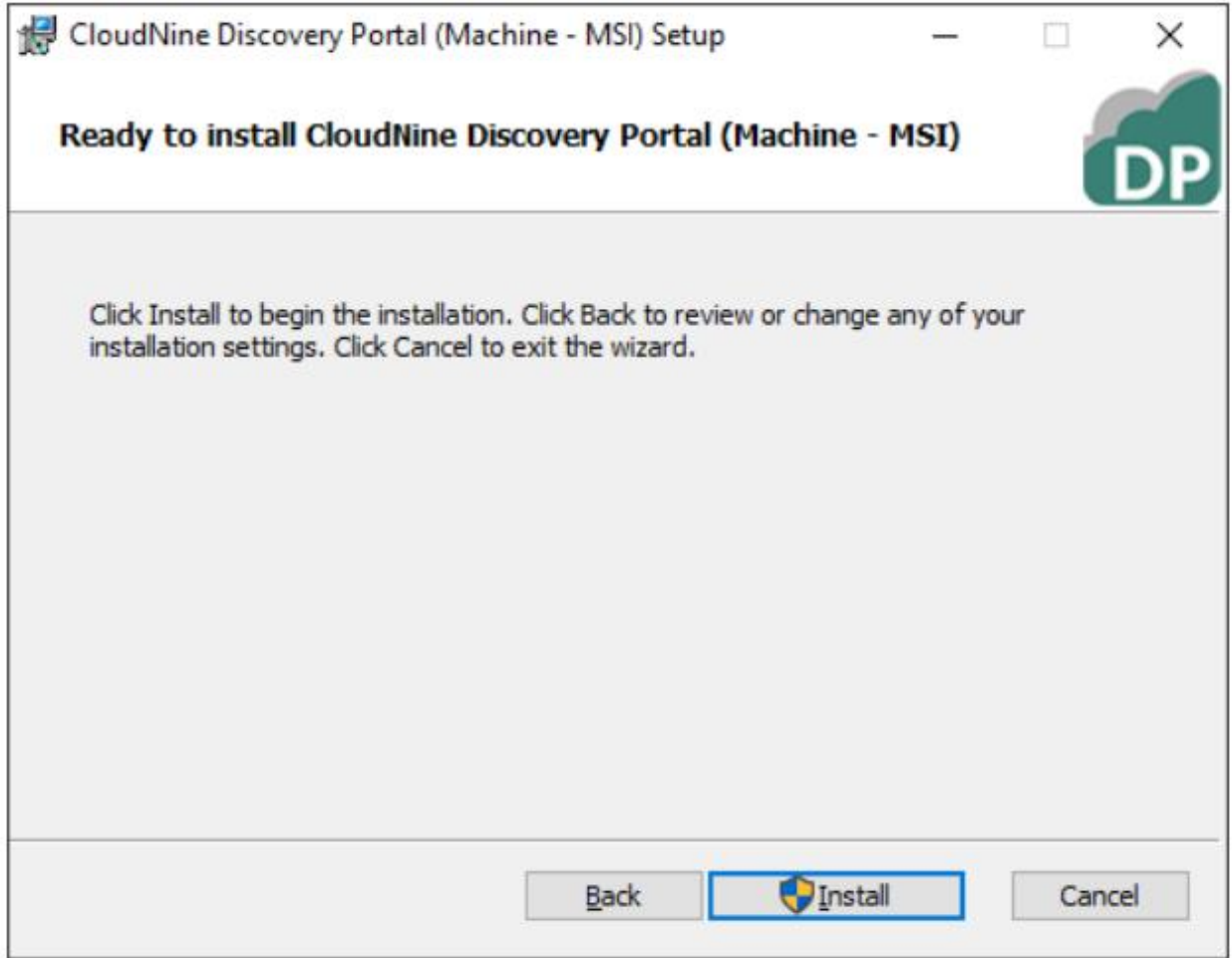
**Step 10.** At the **Custom Setup** screen, ensure that the **Main Application** feature under **CloudNine Discovery Portal** is selected to be installed. Click **Next** to proceed.

 Any feature/program with a red X will not be installed.





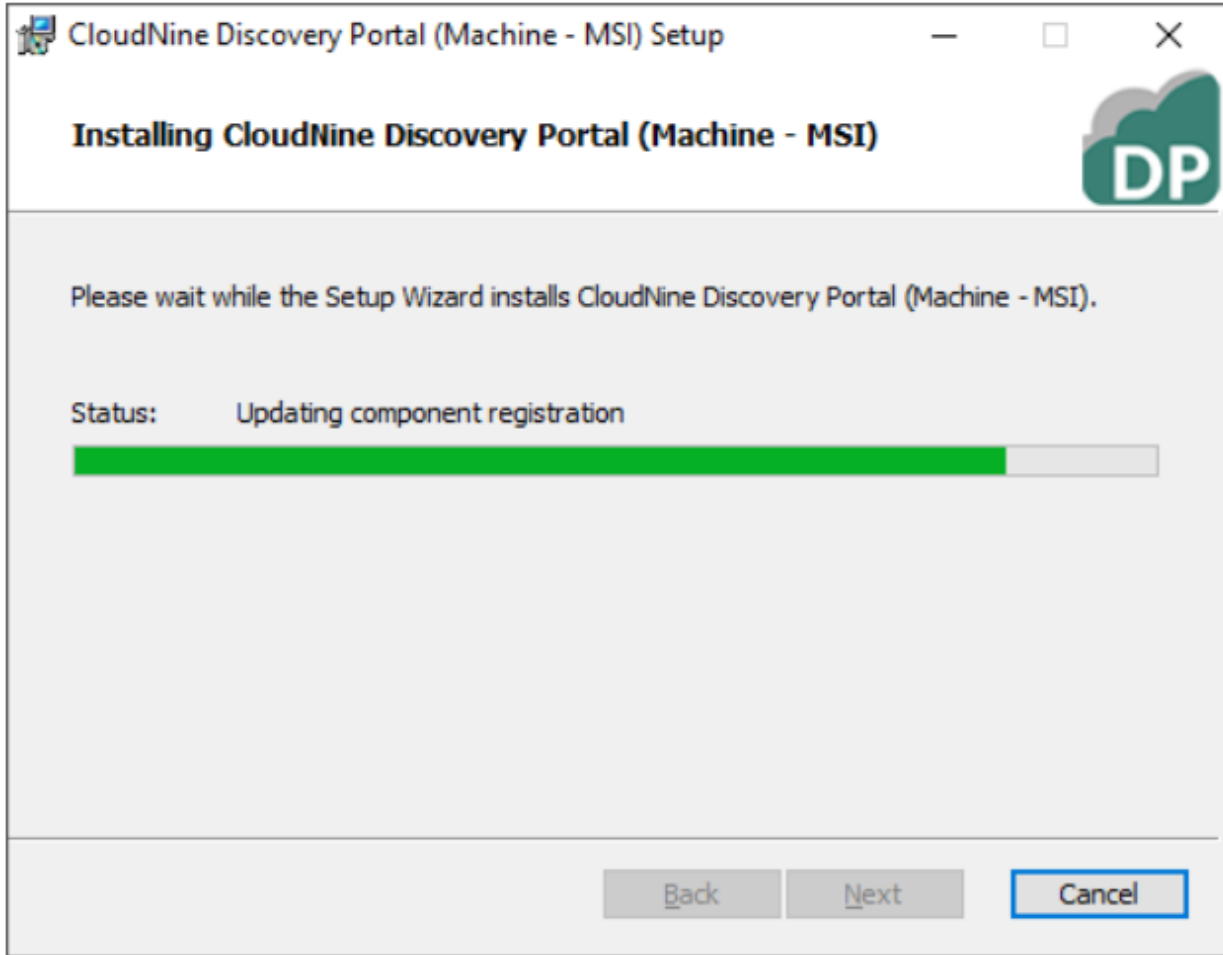
**Step 11.** At the **Ready to Install** screen, click **Install** to begin the installation process.



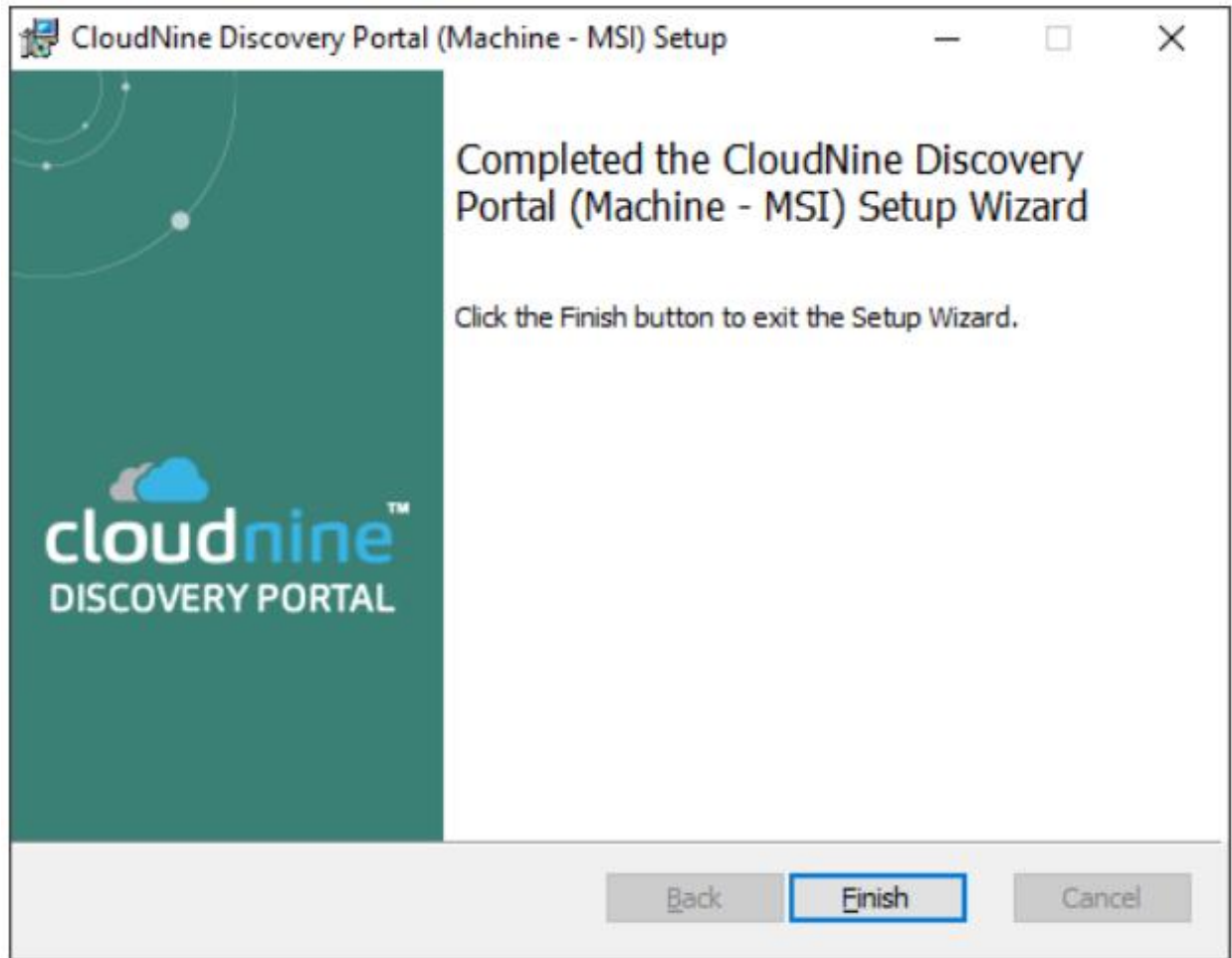
**Step 12.** You will be brought to the **Installing** screen, where the installation progress is displayed. This process may take several minutes.



Depending on your Windows UAC (User Account Control) settings, you be prompted at this time to confirm that you want to allow changes to your computer. Click **Yes** to proceed with the installation.



Step 13. After the installation finishes, you will arrive at the **Completed** screen. Click **Finish** to exit the **Setup Wizard**.



**NOTE:** You must have Administrator rights to your computer to install the program. If you have any problems installing the Portal, contact your firm's IT Department.

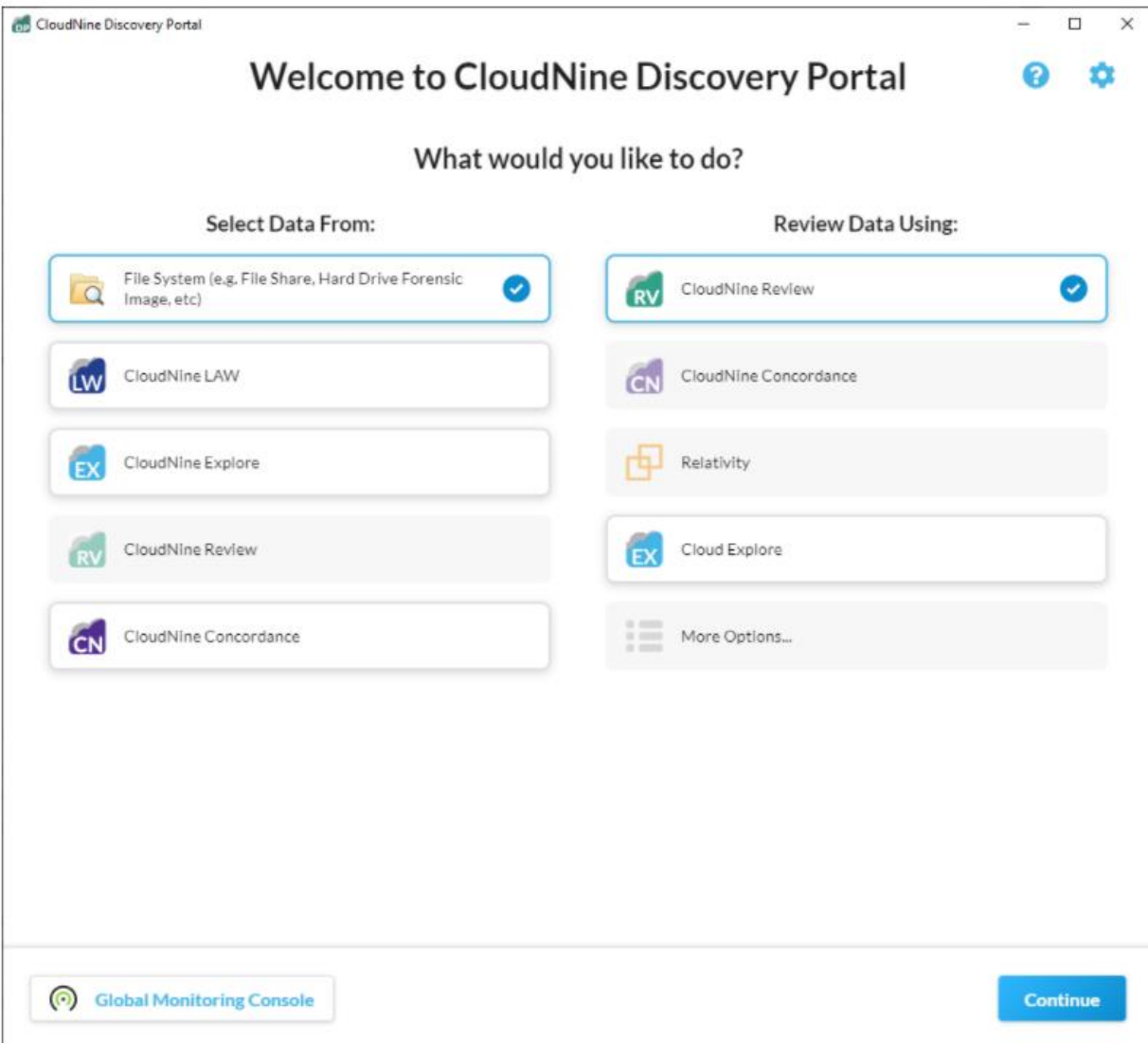
## Uploading Data to CloudNine Discovery Portal

This section will walk you through the steps you need to take to upload data.

### File System to Review: Getting Started - Stage 0

**Step 1.** Open the Discovery Portal

**Step 2.** 1. At the Home screen, left-click on File System from the left column to select it, and Review will automatically be selected under the right column. Click Continue to proceed.

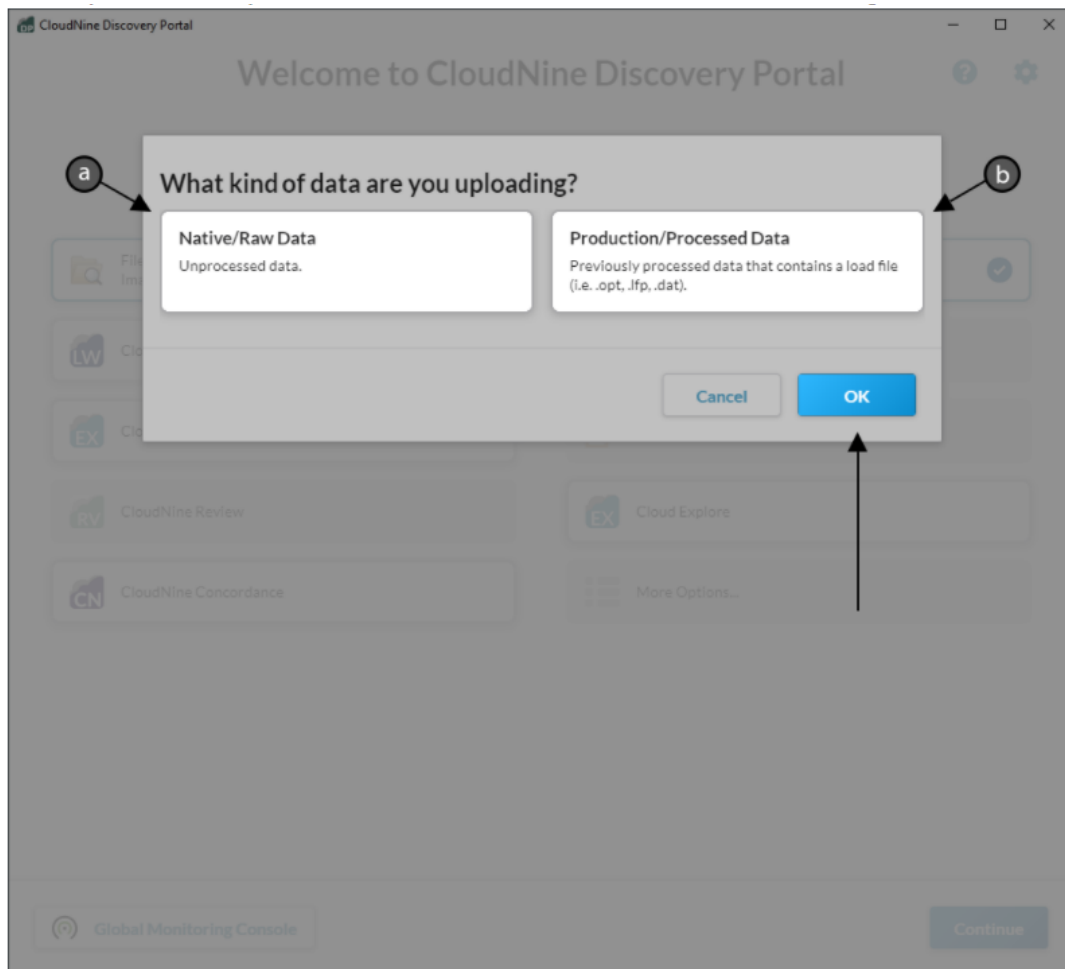


**NOTE:** This option will require the Client to Compress the Data for you, which may add some time to your upload

**Step 3.** From the What kind of data are you uploading? overlay, choose one of the following options:

- Select Native/Raw Data on the left to upload data that has not gone through any previous processing.
- Select Production/Processed Data on the right to upload previously processed data, such as load files or production files.

**Step 4.** Once you have made your selection, click OK to continue to the CloudNine Case stage.



## File System to Review: CloudNine Case - Stage 1

**Step 5.** On this screen, you'll select a Review Case as the upload location, and determine a name for the data set being uploaded.

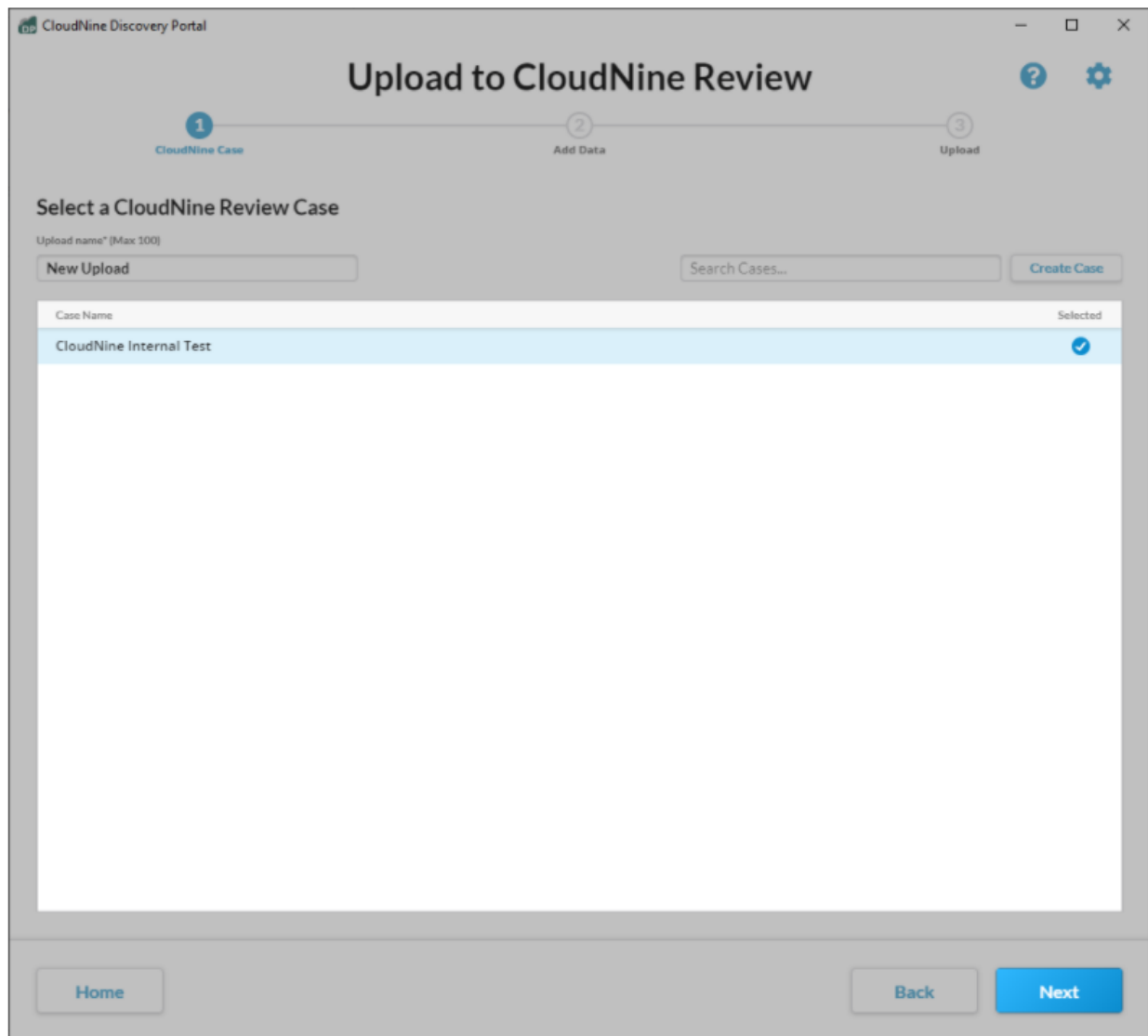
**Step 6.** First, enter an Upload name into the box provided at the top-left.

The screenshot displays the 'Upload to CloudNine Review' interface. At the top, there is a progress bar with three steps: '1 CloudNine Case', '2 Add Data', and '3 Upload'. The 'CloudNine Case' step is currently active. Below the progress bar, the main heading is 'Select a CloudNine Review Case'. Underneath, there is an input field for 'Upload name\* (Max 100)' containing the text 'New Upload'. To the right of this field is a search bar labeled 'Search Cases...' and a 'Create Case' button. Below these elements is a table with two columns: 'Case Name' and 'Selected'. The table contains one row with the case name 'CloudNine Internal Test'. An arrow points from the 'New Upload' text in the input field to the 'CloudNine Internal Test' entry in the table. At the bottom of the page, there are three buttons: 'Home', 'Back', and 'Next'.

**Step 7.** Next, select the desired Review Case from the Case Name list below. For longer lists, you can type directly into the search bar at the top-right to quickly locate the correct case.

- If the desired Review Case does not yet exist, you can create one by using the Create New Review Case feature.

**Step 8.** Once the Case Name and Upload name have been determined, click Next at the bottom-right to proceed to the **Add Data** stage.



## File System to Review: Add Data - Stage 2

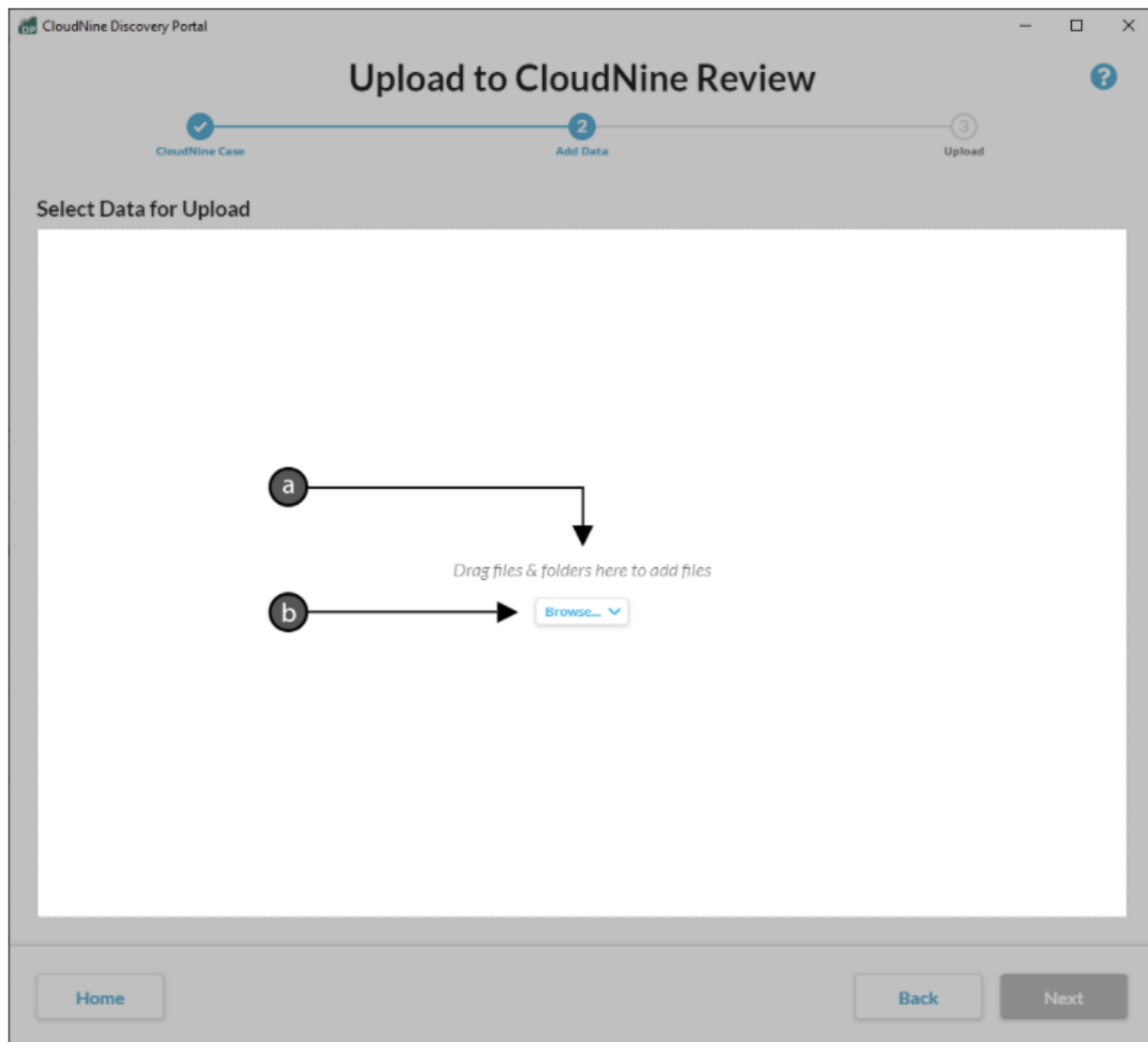
**Step 9.** On this screen, you'll select the data set to upload to Review. This stage varies depending on the data type selected at Stage 0:

- For Native/Raw Data, proceed to Step 9.
- For Production/Processed Data, skip to Step 12.

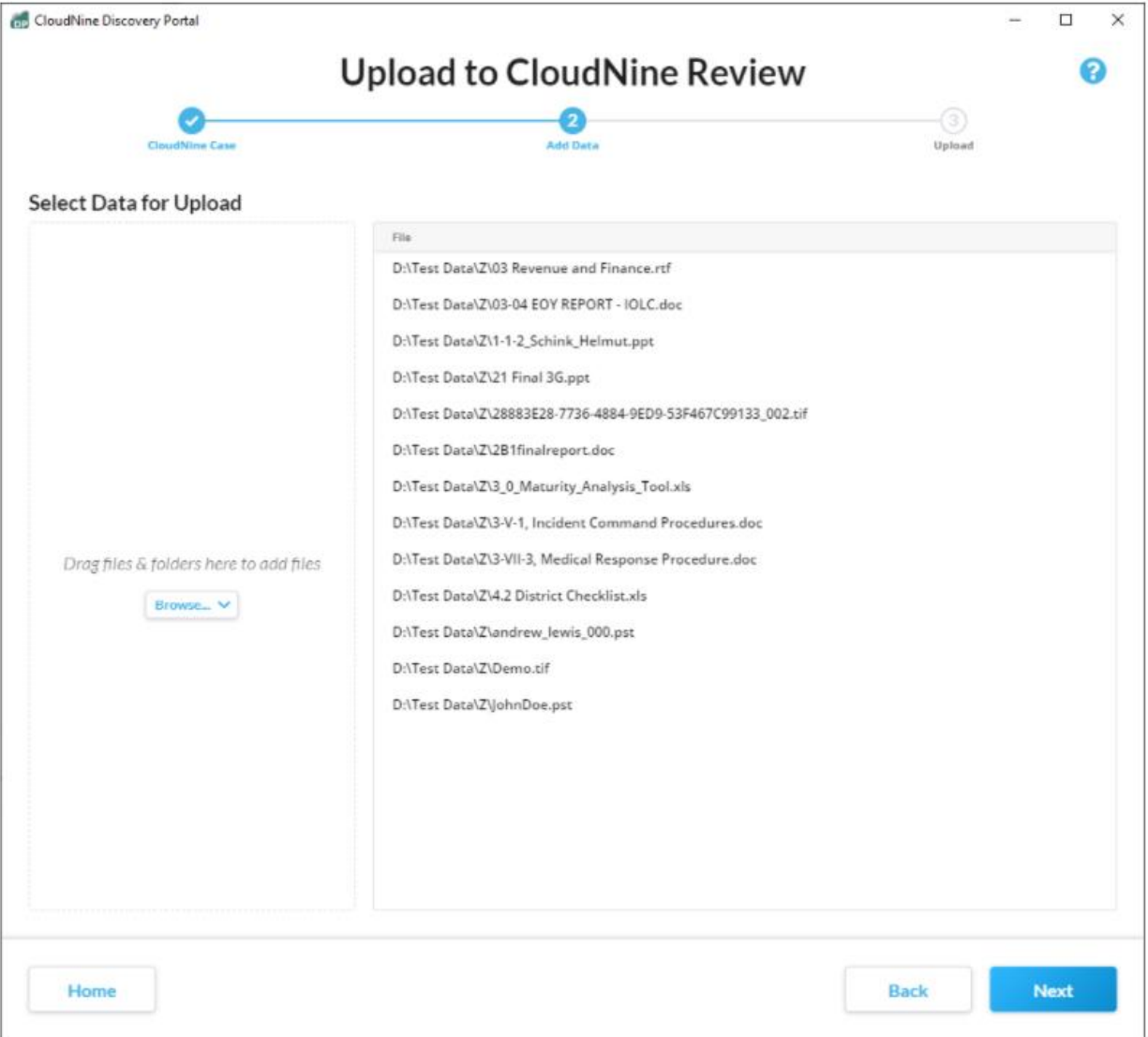


**Step 10.** Adding Native/Raw Data - Do either of the following:

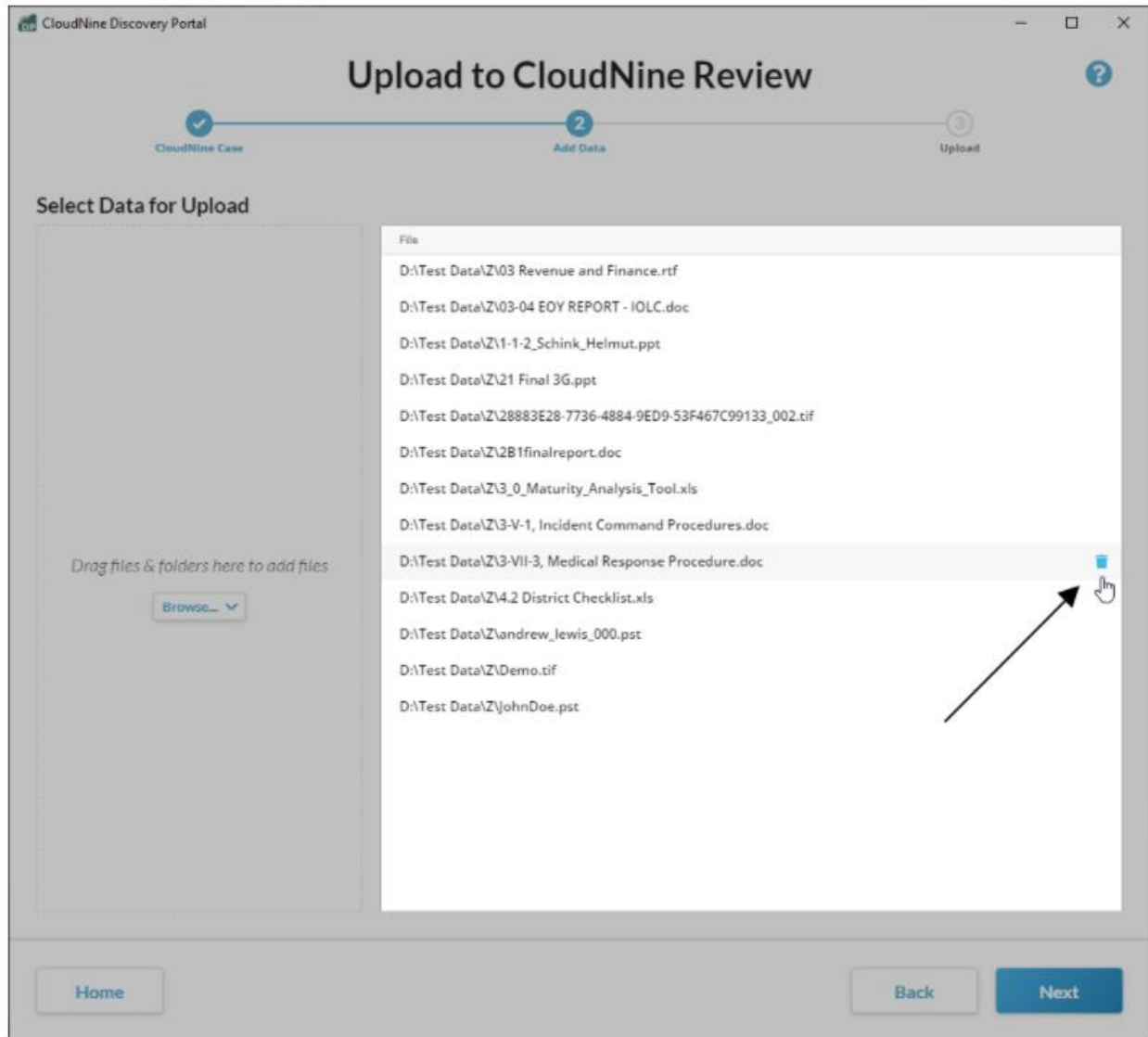
- Drag and/or drop any number of files/folders from a Windows File into the area marked Drag files & folders here to add files.
- Click the Browse... drop-down, choose either Add files... or Add folder..., navigate to and select the desired files/folders from the File Explorer that opens, and then click Open or Select Folder at the bottom-right to add them.



**Step 11.** Once files/folders have been added, a File list will appear displaying a list of selected files on the right. Repeat Step 8 to continue adding any remaining files/folders.

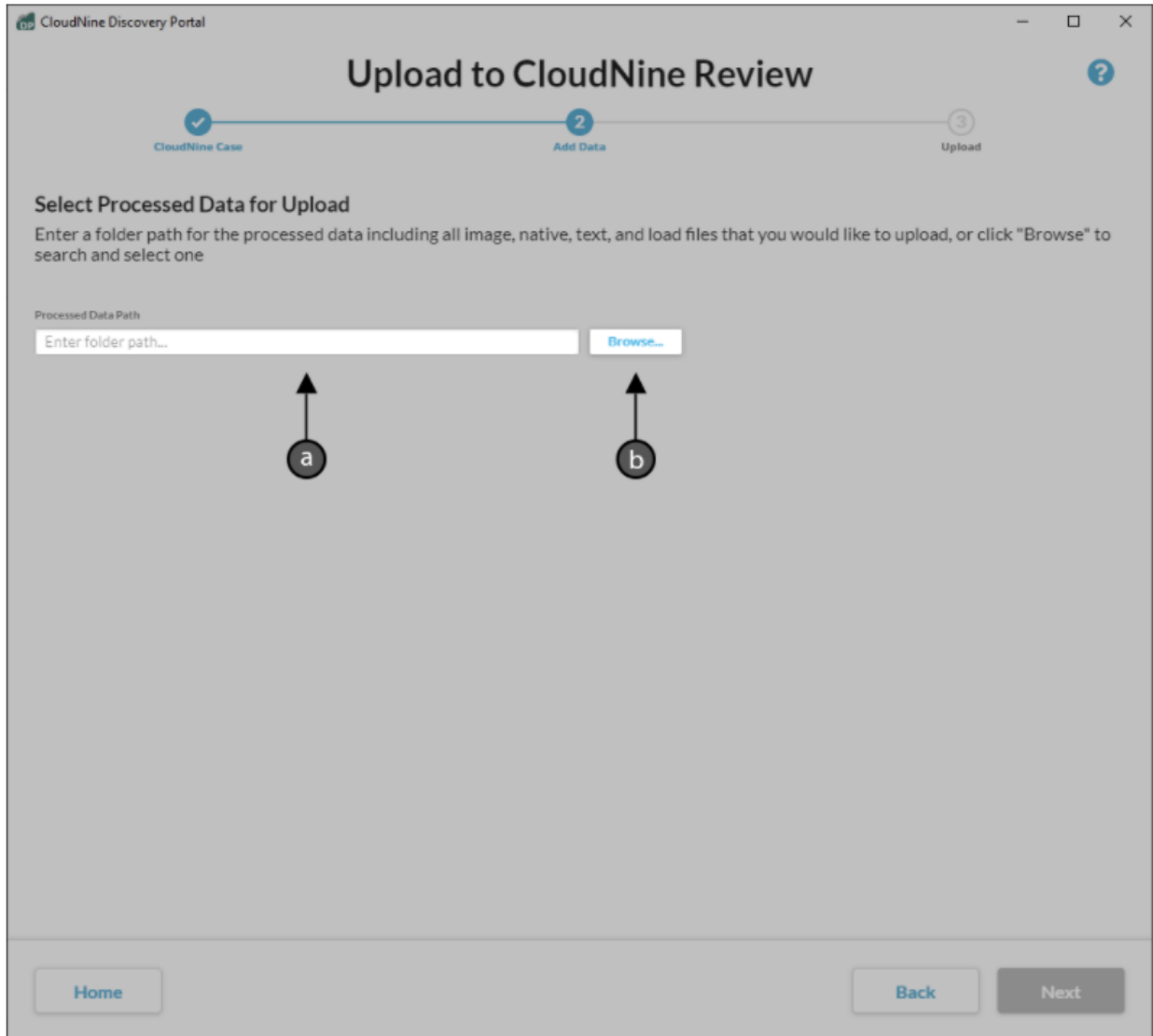


**Step 12.** Removing Native/Raw Data: You can remove unwanted files by hovering your mouse over them under the File list and clicking on the trashcan icon that appears.



**Step 13.** Adding Production/Processed Data - Do one of the following:

- Type the folder path for your desired data set directly into the Processed Data Path box provided.
- Click the Browse... button on the right, navigate to and select the folder containing your desired data set from the File Explorer that appears, and then click Select Folder at the bottom-right.



**Step 14.** Once you're satisfied with the selected data set, click Next at the bottom-right to proceed to the Upload stage.

### File System to Review: Upload - Stage 3

**Step 15.** On this screen, you'll have one last chance to go Back to any previous screen and make changes. Take this time to review the selections you've made.

CloudNine Discovery Portal

## Upload to CloudNine Review

CloudNine Case Add Data Upload

### Confirm & Upload

Uploading From: **File system**  
Total files selected for upload: 13

Uploading To: **CloudNine Review - CloudNine Internal Test**  
Upload name: Test

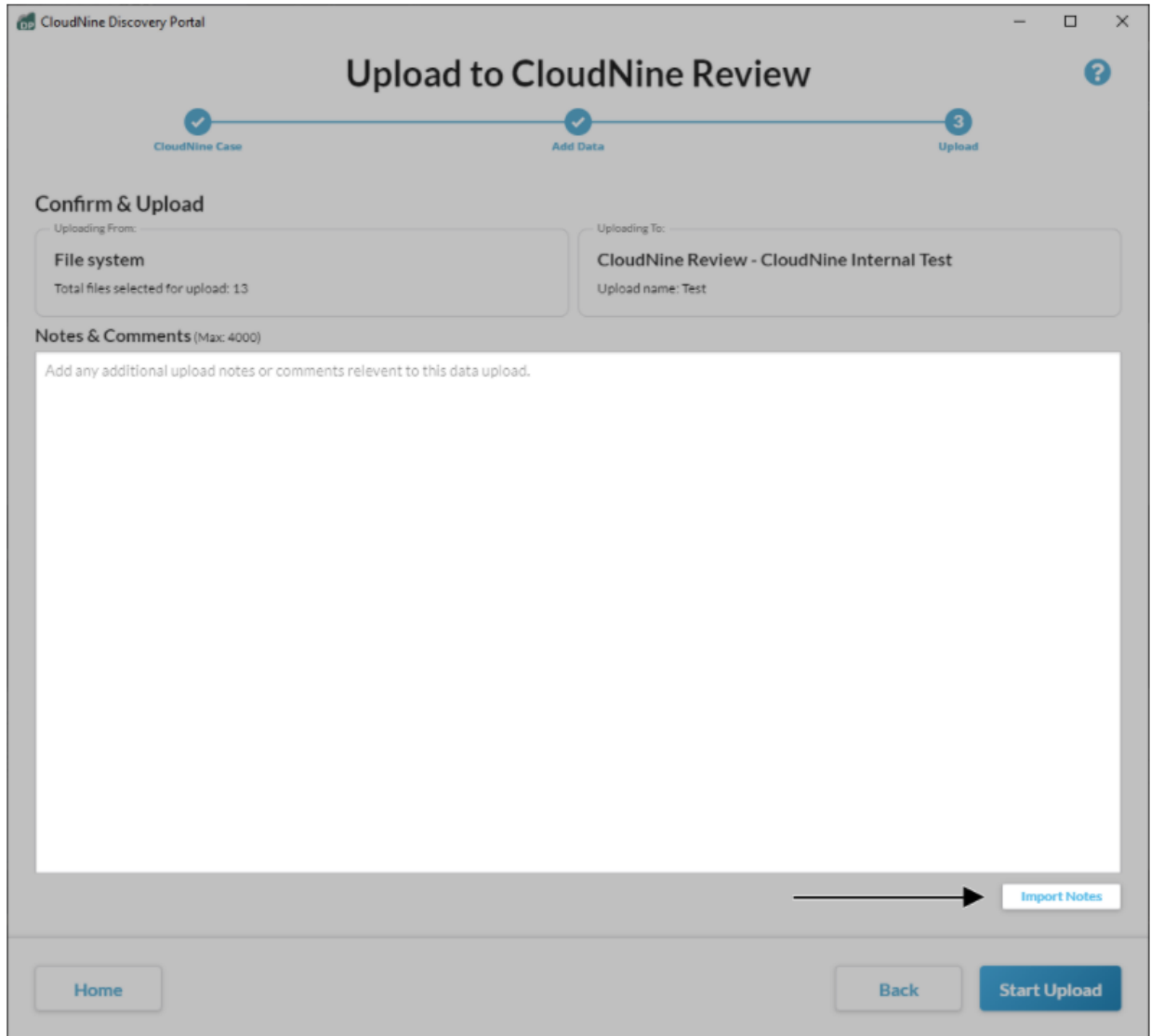
### Notes & Comments (Max: 4000)

Add any additional upload notes or comments relevant to this data upload.

Import Notes

Home Back Start Upload

**Step 16.** Optional: You can type Notes & Comments to go along with your upload into the box provided, or click the **Import Notes** button at the bottom-right to select a text file to import as your Notes & Comments instead.



**Step 17.** If you're satisfied with the information displayed, then you are ready to begin the upload. Click Start Upload at the bottom-right to proceed.

**Step 18.** Once the upload has begun, you will automatically be brought to the Global Monitoring Console. From there, you can monitor the upload progress.

## CloudNine Discovery Portal: What to Expect Next

You will receive three emails over the course of the process.

- **Email 1:** (CloudNine Discovery Portal Upload Received) will arrive after the data has been uploaded, confirming receipt of the data set.
- **Email 2:** (CloudNine Discovery Portal Data Ready) will arrive after the initial processing has been done, and your data set is available to start reviewing.

**Note:** At this point, some indexing and analytics have not been performed.

- **Email 3:** (CloudNine Discovery Portal Analytics Complete) arrives after data has been completely indexed and analytics have finished.

You will receive these emails after each upload, so if you are uploading multiple data sets into the same project, you should wait until the second email of the last upload to begin reviewing documents.

## CloudNine Discovery Portal: Supported File Types

Adobe Framemaker MIF (*.mif)		RAR (*.rar)
Ami Pro (*.sam)	Microsoft Excel 2007, 2010, and 2013 (*.xlsx)	TAR (*.tar)
Ansi Text (*.txt)	Microsoft OneNote 2007, 2010, and 2013 (*.one) (dtSearch 7.72 and later)	TIFF (metadata only) (*.tif)
ASCII Text	Microsoft Outlook data files, including attachments (*.PST)	TNEF (winmail.dat)
ASF media files (metadata only) (*.asf)	Microsoft Outlook/Exchange Messages, Notes, Contacts, Appointments, and Tasks	Treepad HJT files (*.hjt)
CSV (Comma-separated values) (*.csv)	Microsoft Outlook Express 5 and 6 (*.dbx) message stores	Unicode (UCS16, Mac or Windows byte order, or UTF-8)
DBF (*.dbf)	Microsoft PowerPoint (*.ppt)	Visio XML files (*.vdx)
EBCDIC	Microsoft PowerPoint 2007, 2010, and 2013 (*.pptx)	Windows Metafile Format (*.wmf)
EML (emails saved by Outlook Express) (*.eml)	Microsoft Rich Text Format (*.rtf)	WMA media files (metadata only) (*.wma)
Enhanced Metafile Format (*.emf)	Microsoft Searchable Tiff (*.tiff)	WMV video files (metadata only) (*.wmv)
Eudora MBX message files (*.mbx)	Microsoft Word for DOS (*.doc)	WordPerfect 4.2 (*.wpd, *.wpf)
Flash (*.swf)	Microsoft Word for Windows (*.doc)	WordPerfect (5.0 and later) (*.wpd, *.wpf)
GZIP (*.gz)	Microsoft Word 2003 XML (*.xml)	WordStar version 1, 2, 3 (*.ws)
HTML (*.htm, *.html)	Microsoft Word 2007, 2010, and 2013 (*.docx)	WordStar versions 4, 5, 6 (*.ws)
iCalendar (*.ics)	Microsoft Works (*.wks)	WordStar 2000
Ichitaro (versions 5 and later) (*.jtd, *.jbw)	MP3 (metadata only) (*.mp3)	Write (*.wri)
JPEG (*.jpg)	Multimate Advantage II (*.dox)	XBase (including FoxPro, dBase, and other XBase-compatible formats) (*.dbf)
Lotus 1-2-3 (*.123, *.wk?)	Multimate version 4 (*.doc)	XML (*.xml)
MHT archives (HTML archives saved by Internet Explorer) (*.mht)	OpenOffice versions 1, 2, and 3 documents, spreadsheets, and presentations (*.sxc, *.sxd, *.sxi, *.sxw, *.sxc, *.stc, *.sti, *.stw, *.stm, *.odt, *.ott, *.odg, *.otg, *.odp, *.otp, *.ods, *.ots, *.odf) (includes OASIS Open Document Format for Office Applications)	XML Paper Specification (*.xps)
MIME messages, including attachments	PDF files (*.pdf)	XSL
MSG (emails saved by Outlook), including attachments (*.msg)	Quattro Pro (*.wb1, *.wb2, *.wb3, *.qpw)	XyWrite
Microsoft Access MDB files (*.mdb, *.accdb, including Access 2007 and Access 2010)	QuickTime (*.mov, *.m4a, *.m4v)	ZIP (*.zip)
Microsoft Document Imaging (*.mdi)		
Microsoft Excel (*.xls)		
Microsoft Excel 2003 XML (*.xml)		