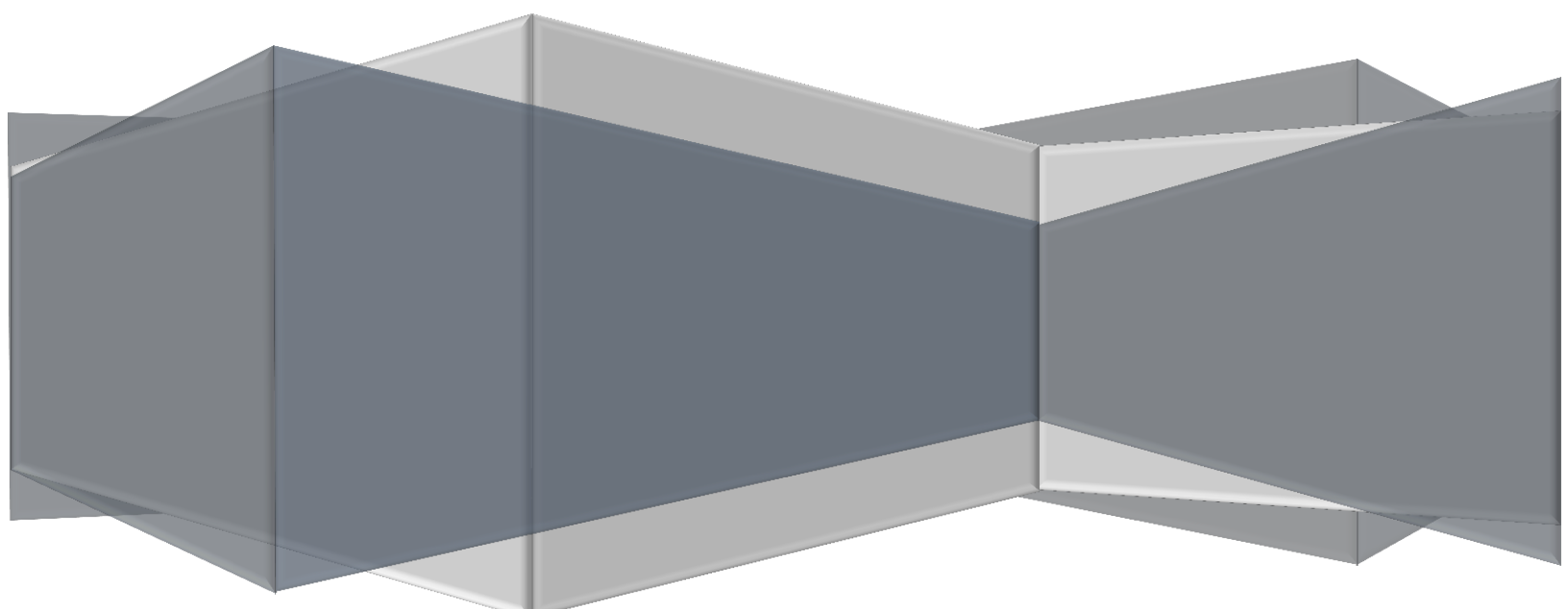


cloudnine™

# User Guide

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Written By: CloudNine Technical Support



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# **Section 1:**

## **Getting Started**

## 1.1 - Introduction and Getting Help

CloudNine® is a powerful, yet easy-to-use online review tool that is available to host your litigation document collections. It can host the smallest of collections up through those with hundreds of millions of pages. All you need to access CloudNine is a browser.

Most of our clients find that CloudNine is intuitive and easy to use. CloudNine offers several tools to help you when you do have questions:

- This users guide covers CloudNine's most used features. The majority of our clients do not need to learn more than what is covered here to effectively use CloudNine.
- Report an Issue is our preferred method for contact. This method is delivered to our entire support team and contains critical system information that will help us diagnose your problem.
- Call our Technical Support Help Desk at 713-462-6464. It's available Monday through Friday from 9:00 a.m. to 5:00 p.m. central time.
- Contact CloudNine for free on-line training. The session only takes a couple of hours and it will help to get you off on the right foot.
- Access the online support center for assistance. Click the Training & Support menu item in the menu bar in any CloudNine screen and select Contact Support: (see Figure 1)

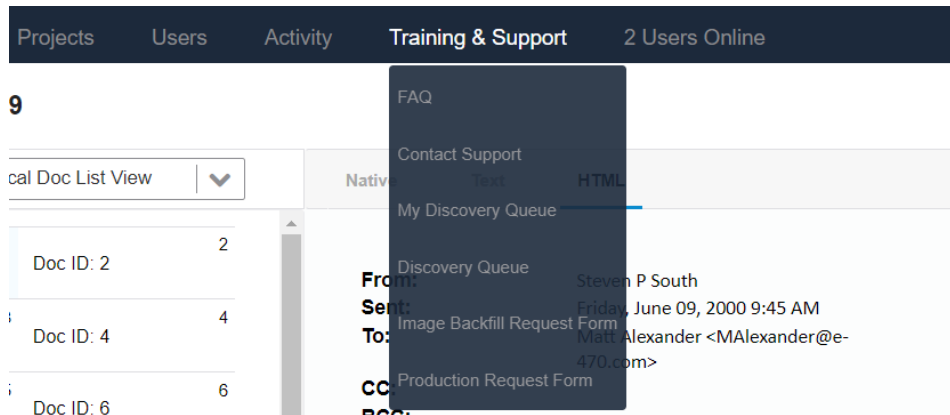


Figure 1

## 1.2 - Accessing a database

After entering your Username and Password on the CloudNine log in screen, you'll see the home page. It provides access to each of the databases to which you have access.

Click on a database to open it, or hover your cursor over the three dot icon to access some useful tools: (see Figure 2)

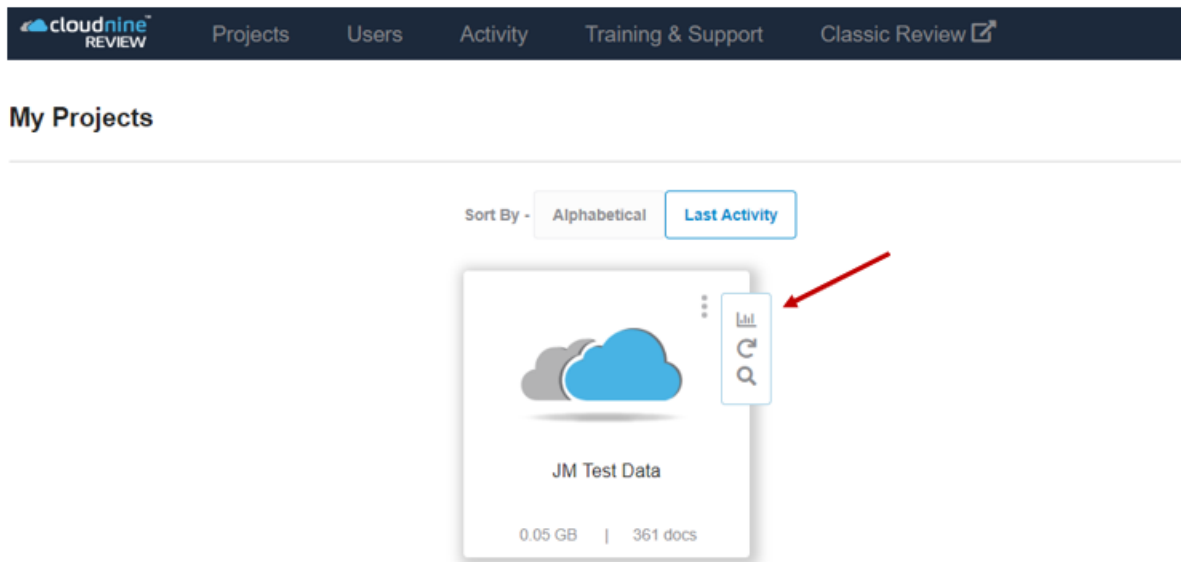


Figure 2

- Click on the *Project Analytics* tool to access database information such as the number of users, the size of the database, keywords that appear in the documents, a document timeline, and so on (there's more information on *Project Analytics* below).
- Click on the *Restore Position* tool to go back to where you were the last time you worked in the database.
- Click on the *Search* tool to execute a search in the database (note, you can also access the *Search* tool once you've opened the database).

## 1.3 - The Database Main Page

The Database Main Page actually just the small part of the page that is not dominated by the current view, which we will get into in Section 2. This part of the page consists of the top navigation bar, which includes the saved searches menu and the Tools Menu. Everything else on the page is part of a Specific View. (In [Figure 3](#) you can see the view)

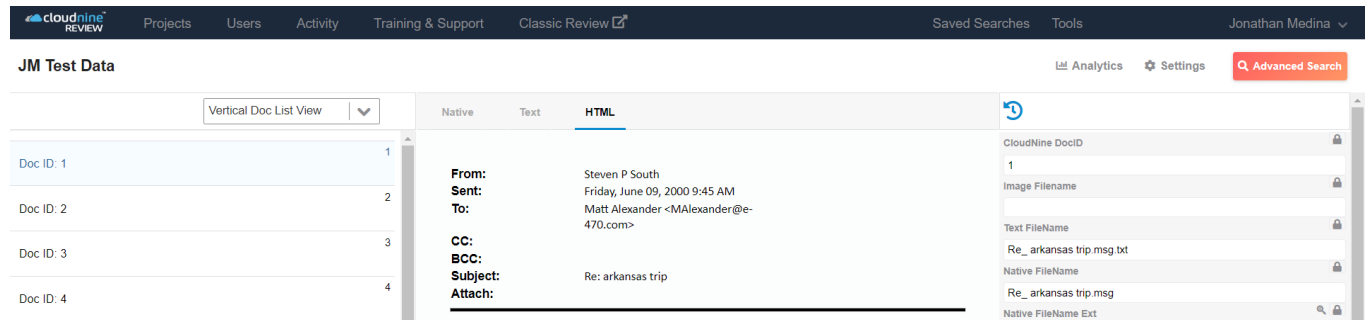


Figure 3

At the top left-hand corner, you will see our Cloudnine Review logo button, followed by the navigation bar. The Navigation bar consists of the following 4 buttons while on the home page:

- 1) Cloudnine Review button- Takes you back to the Project Selection Page.
- 2) Projects- Allows you to update any active project.
- 3) Users- Allows you to add any new user or update any current user.
- 4) Activity- This option opens a drop-down menu with 2 options.
  - a.) Legal Hold- Allows you to submit a legal hold notification.
  - b.) Bulk Exports- Allows you to view the status of all of the bulk exports you submit.
- 5) Training & Support- This option opens a drop-down menu with 2 options.
  - a.) Contact Support- This allows you to submit an issue to our support team so they can assist as fast as possible.
  - b.) My Discovery Queue- This option allows you to monitor the status all your data uploads to the Discovery Client.
- 6.) Classic Review- Here you have the option on returning to our Classic Review user interface.

## 1.4 - Project Analytics

Project Analytics is available in both the Project Management screen and inside the project.

The *Project Analytics* tool provides useful information about the database. A full list of options to search by will be covered in Section 1.4(a). On the left side of the screen, select the type of information you'd like to see. That information will appear to the right. In this example, *Document Timeline* is selected: (see Figure 4)

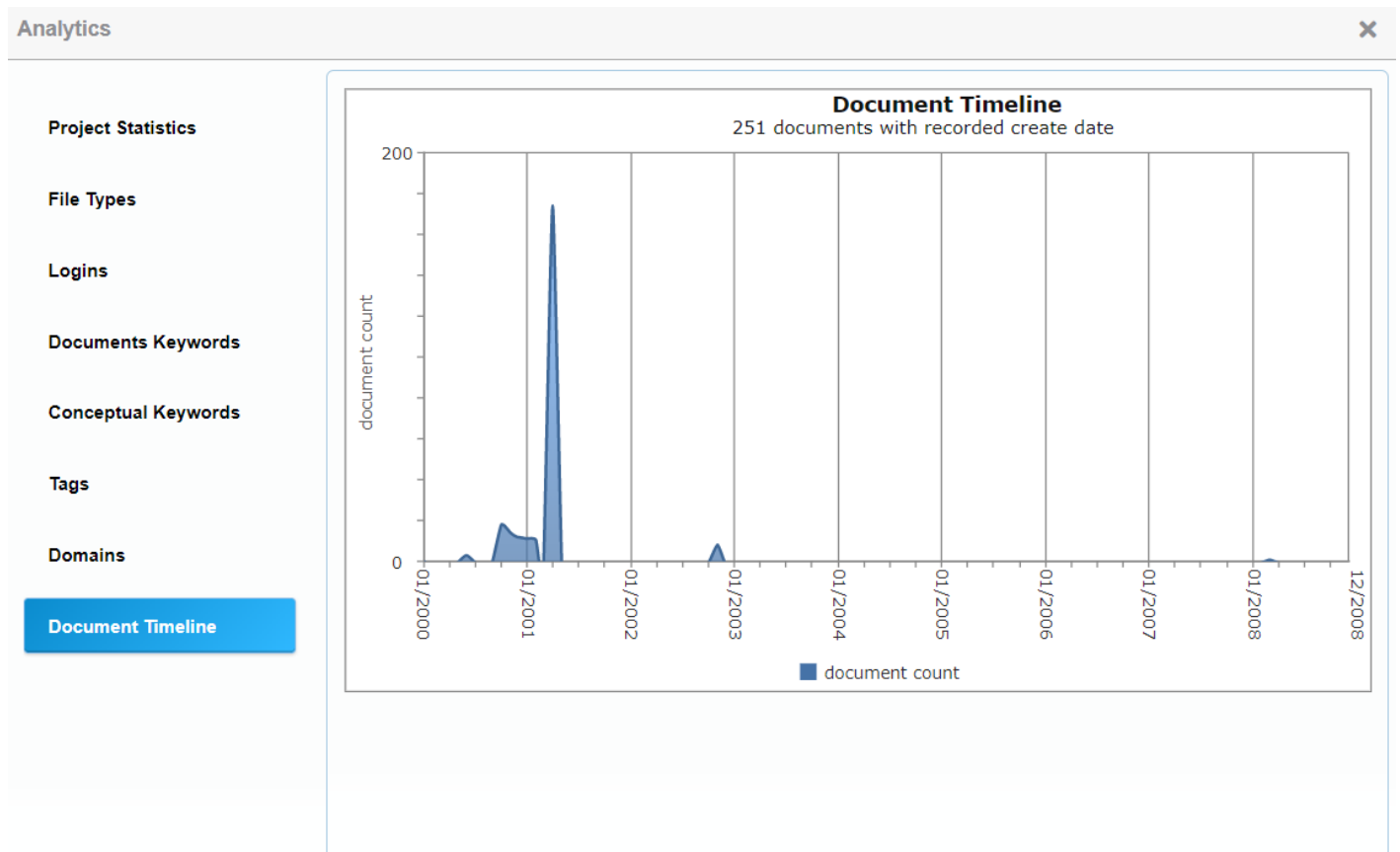


Figure 4

## 1.4(a) – Analytics Tabs

### Here's the database information that's available in the *Project Analytics* tool:

Project Statistics: Database information such as the number of users who have access, the number of gigs, the number of documents, the number of pages, and information on clusters.

File Types: A list of the file types that have been loaded into the database, and the number of each.

Logins: A list of the users who have logged into the database and the number of times each has logged in. (Only available for Administrators)

Document Keywords: A list of the 100 most frequently occurring words in the document collection and the number of times each word occurs.

Conceptual Keywords: Identifies the key words most often used in creating conceptual clusters, and displays them as a list and word cloud.

Tags: A list of the tags that have been applied to documents in the database, and the number of times each has been applied.

Domains: A list of the most frequently occurring domains found in emails in the collection, and the number of times each appears.

Document Timeline: A graphical depiction of the dates of documents in the database.



## 1.4(b) - Quick Searching Analytics

To perform a quick search in Project Analytics, simply click on the term you wish to search on. In [Figure 5](#) below, you can see that we have the Document Keywords tag selected. The word cloud for the public domain data that we are using is located to the left of the same list of terms sorted by hit count.

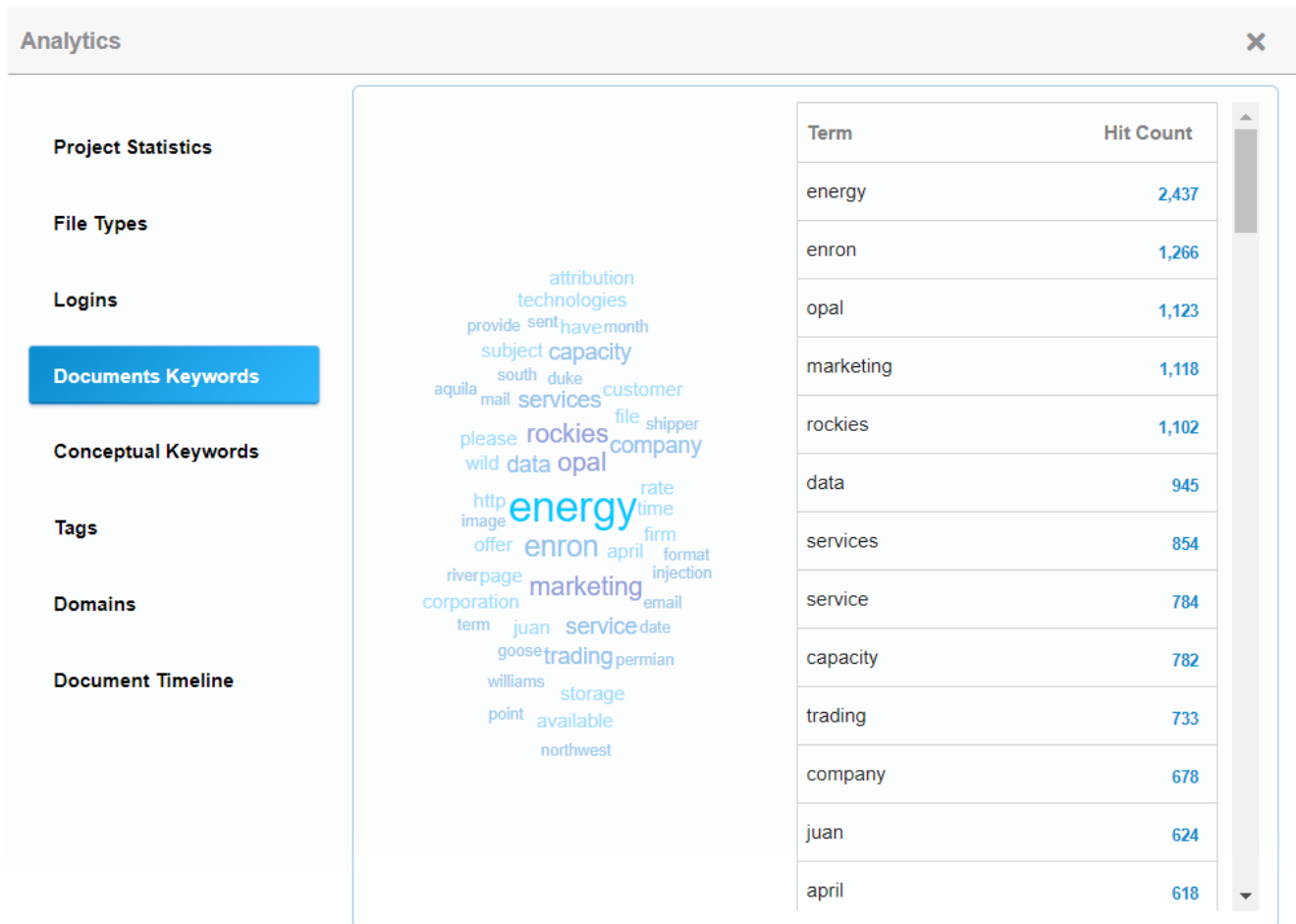


Figure 5

When we click “Corporation”, a search is run, returning documents that have the word Corp inside them. (See Figure 6)

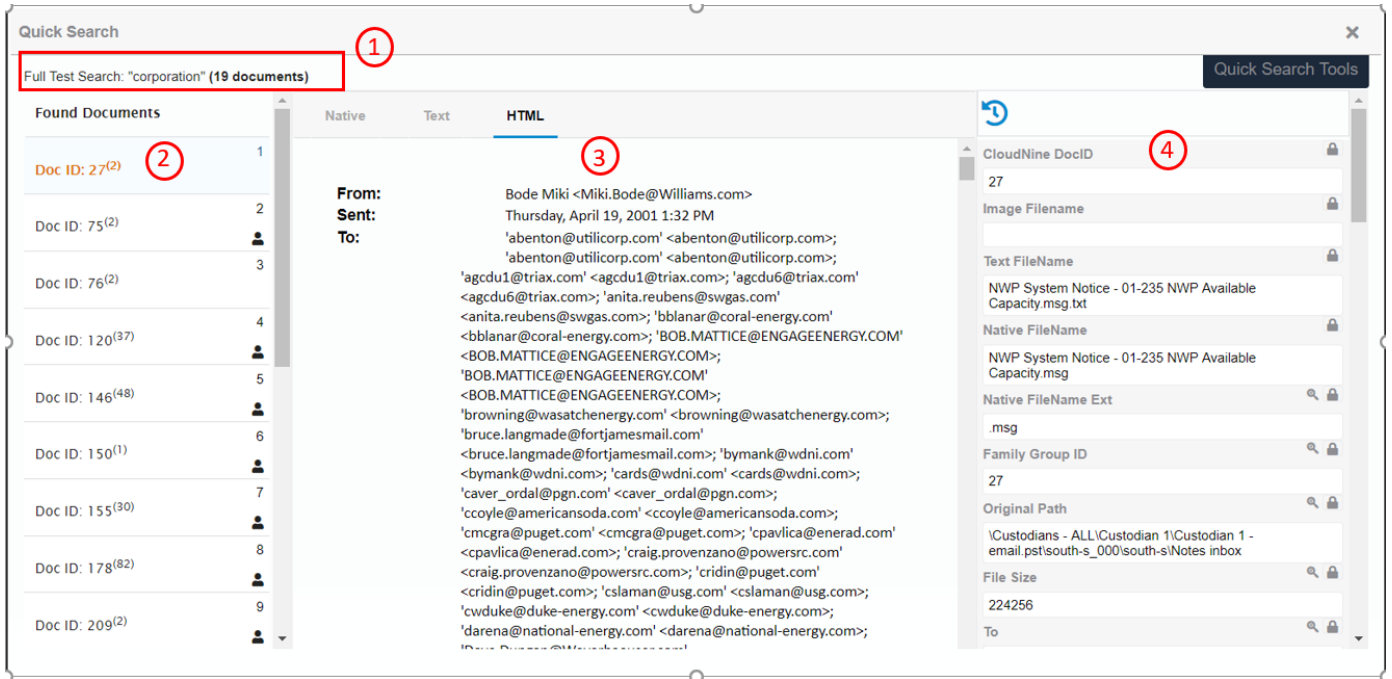


Figure 6

The numbers below correspond to the numbers above:

1. The Quick Search Bar shows you the search parameters that were run for the quick search, as well as the total number of documents returned by the search
2. The Vertical Document list, shows the first 25 documents returned in the search, and the slide bar to the side, allows you to change between groups.
3. The Viewing Pane displays the document in whichever format you wish to view in and is available, Native, Text, Image or HTML.
4. A full list of the documents Metadata is available on the right hand side of the popup. You can tag documents and update fields in the Quick search just like you would in a regular search.

# **Section 2:**

## **Understanding Different Views**

## 2.1 – Vertical Document List

On the first visit to CloudNine, the Database Main Page will automatically display Vertical Document List view. This is the original view offered by CloudNine, and as such, the most often used by clients. It has three main parts to the screen as shown below: (see Figure 7)

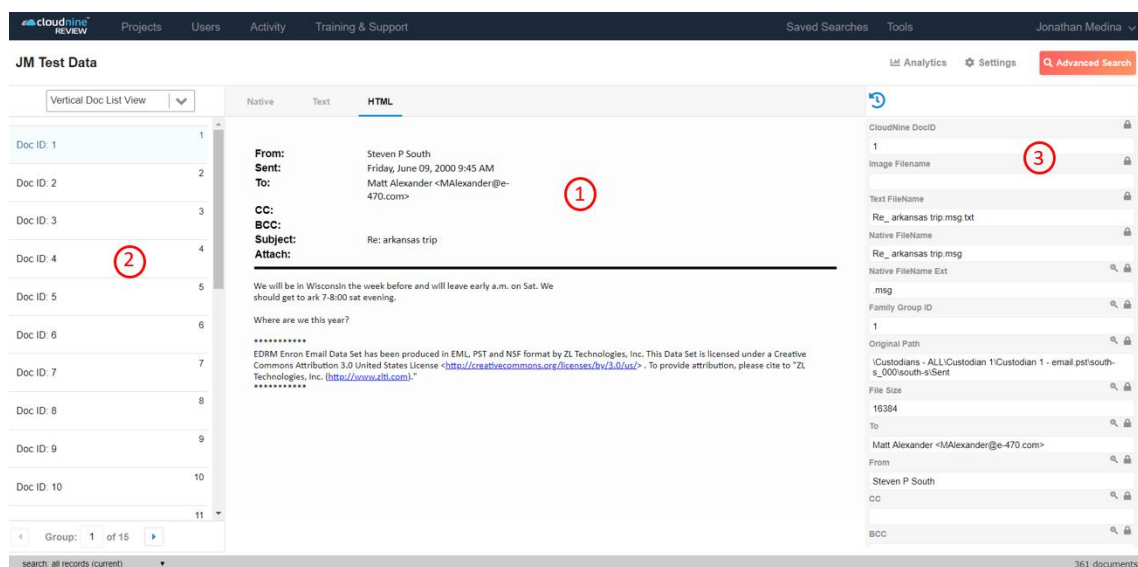


Figure 7

### There are three parts to the screen:

1. The Document Viewing frame will be populated with the current document -- either the document's image, the document's text, the document in its native form, or the document in HTML rendered form.
2. The Vertical Document List frame includes a list of the documents in the "current collection" -- that is, a list of the documents you are working with now. It may be a list of documents that were retrieved in a search or it may be a list of all of the documents in the database. One of the documents on the list will be "selected" (the document number for the selected document will be orange). The "selected" document is the current document -- you'll see its image / text / native document / HTML rendered version in the viewing frame on the left and you'll see data that's been recorded for the document in the frame on the right.
3. The Metadata Information frame includes data that was either extracted automatically from the current document (for example, an author on an email) or recorded by a coder or review team member while analyzing the document (for example, keywords or a tag that the document is privileged). Usually, you'll find information here like the document date, type, authors, recipients, title, and so on.

## 2.1(a) - Document Viewing Frame

Use the tabs at the top of the frame to toggle between viewing a document's image, a document in its native form, the document's text, or the document in HTML rendered form. Tabs will only appear for the versions of the document that are available. (see Figure 8)

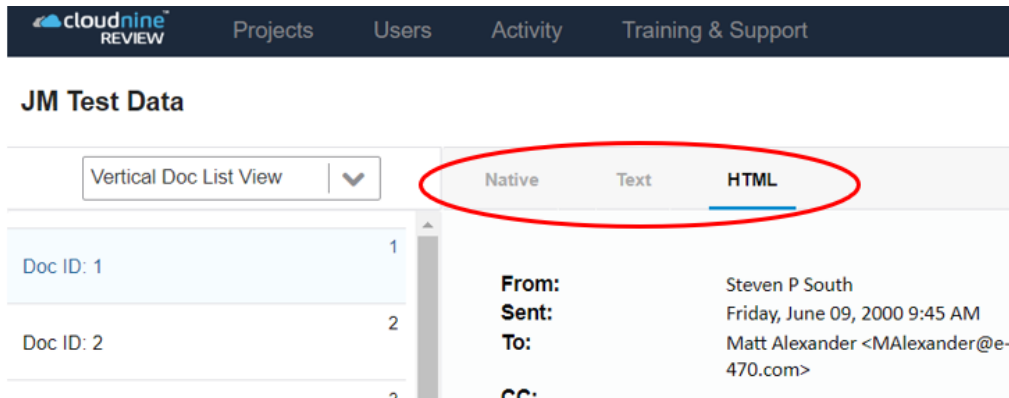


Figure 8

When viewing images, use the page navigation tool to flip through the pages of the document: (see Figure 9)

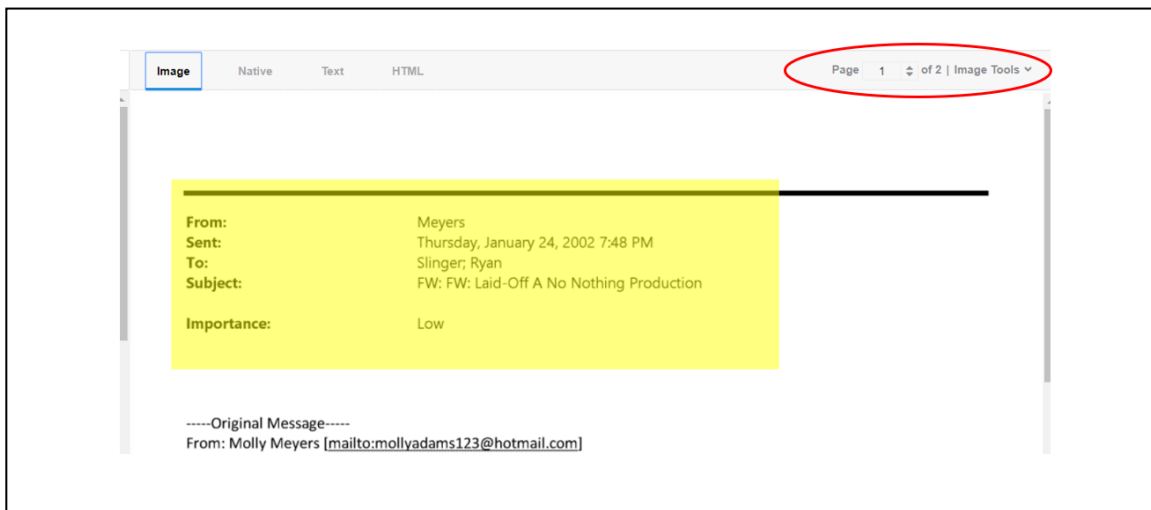


Figure 9

## 2.1(b) – Vertical Document List Frame

When you work in a CloudNine database, you will be working with a list of documents – it might be a list of documents that were retrieved in a search or a list of all the documents in the database. The list is in the left panel on the project main page. (see [Figure 10](#))

By default, documents on a list are organized into groups of 25. If there are 100 documents on a list, the list will be shown to you in 4 groups of 25 each. This minimizes the amount of scrolling to review a lengthy list and

lets you easily hop around to different parts of a list. To move from one group to another, enter the group number in the group tool at the top of the list (or use the arrows to the right of the number to change the number), or click on the vertical bar to the left of the list: (see [Figure 11](#))

Click the Settings button to use the sort tool and change the order of documents on the list. Click in the first part of the sort tool to select the field on which you want the list to sort, and use the second part of the sort tool to select ascending or descending order: (see [Figure 12](#))

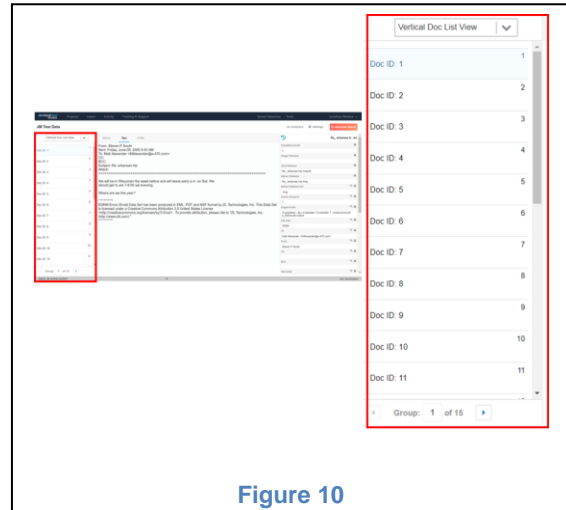


Figure 10

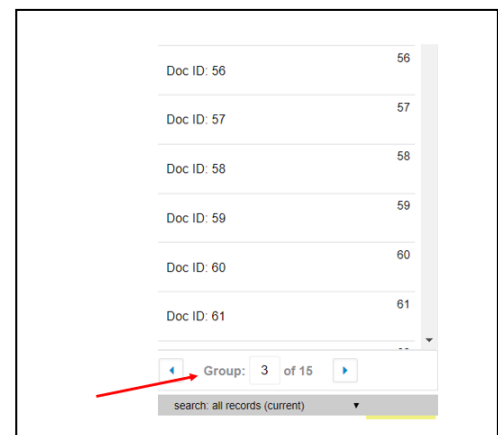


Figure 11



Figure 12

Look to the bottom right corner of the screen to see the total number of documents on the current list. In this example, there are 361: (see Figure 13)

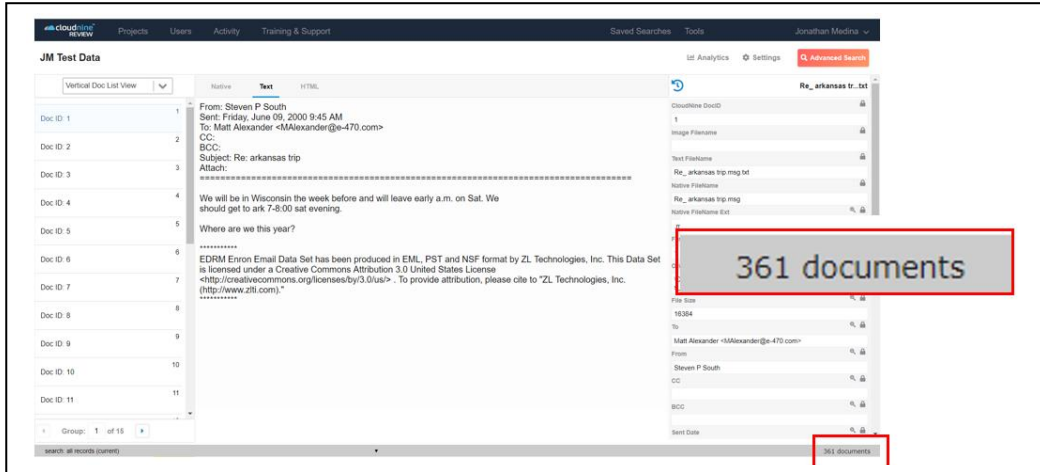


Figure 13

When you work in the database, you are likely to do searches and work with several lists. Note that the current search is listed in the bottom left hand corner of the screen. To retrieve any of the previous searches you've performed in the current session, click on that button and you'll see those searches displayed: (see Figure 14)

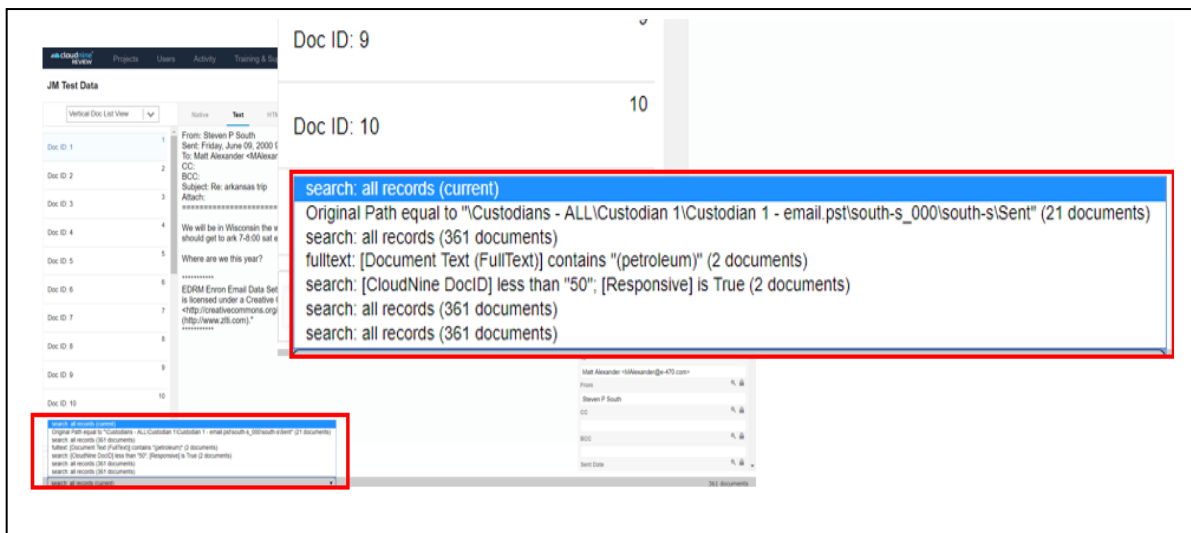


Figure 14

## 2.1(c) - Metadata Information Frame

Data for the selected document appears on the right side of the database main page: (see Figure 15)

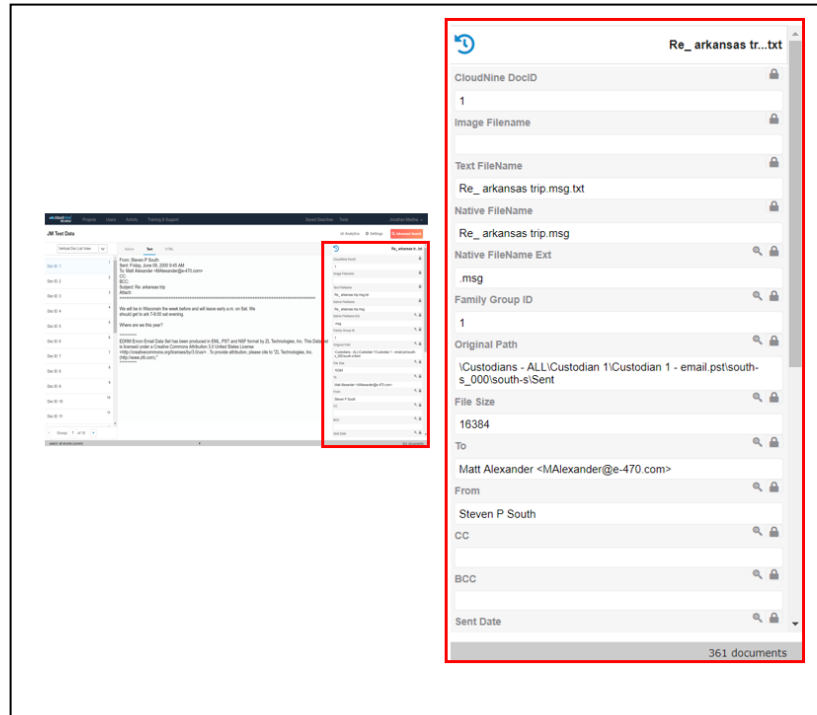
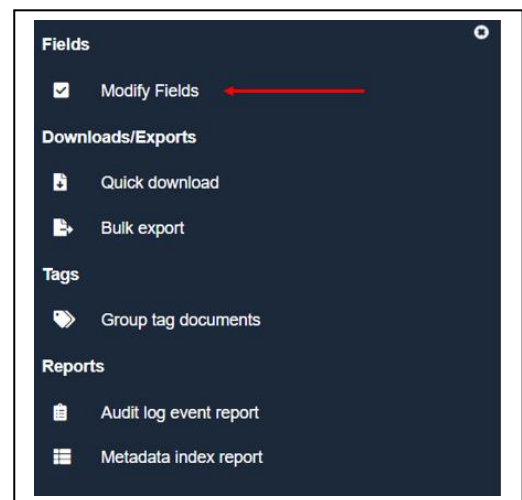


Figure 15

Every piece of data that has been recorded for a document (or extracted in an automated process) is recorded in a field in this frame. Typical fields include Bates numbers, authors, addressees, dates, subject lines and so on. Fields vary from database to database. Basic fields are defined when a database is established. Users add others as they work in a database.

Each user can customize the Indexed Information Frame by determining which fields will display in the frame and the order in which the fields will display. Click on Tools in the top right corner of the screen and click the *Modify Fields* option:



(see Figure 16)





On the next screen, select the fields to display by clicking the “Eye” Icon. In the frame and drag the fields into your preferred order using the “4 horizontal line” icon or send the field to the top with the “arrow” icon. :(see Figure 17)

Modify Fields
✕

Fields (29)
  New Field























Move	Name	Scope	Type	Search	Created By	Actions
	Note	Global	Text	No	Brian Kelley	   
	Hot	Global	Yes/No	No	Brian Kelley	   
	Image Filename	Global	Text	No	System	 
	Text FileName	Global	Text	No	System	 
	Native FileName	Global	Text	No	System	 
	Native FileName Ext	Global	Text	Yes	System	 

Figure 17

CloudNine provides pictorial cues that provide useful information about a document. At the top of the Indexed Information frame, a series of icons will appear. These icons will vary from document to document and only appear when applicable. In this example, five appear: (see Figure 18)

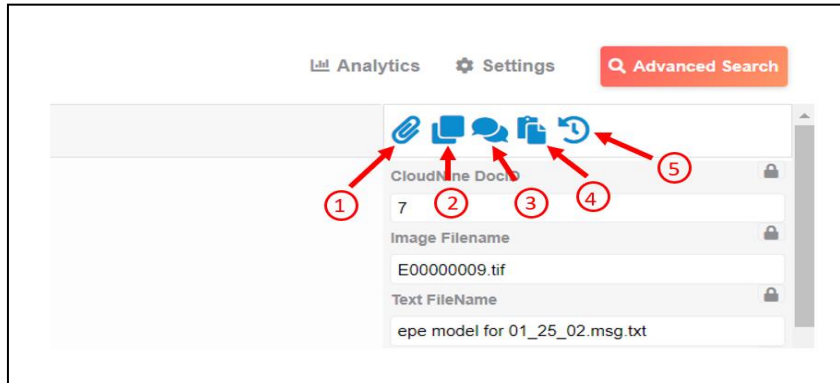


Figure 18

Hover your cursor over an icon and a description will appear. In the example above, the icons tell us this:

- Icon 1. This is a “parent” document – a person icon would signify a child document.
- Icon 2. There “similar” documents in the collection.\*
- Icon 3. There “Conversation” documents in the collection.
- Icon 4. There “near duplicate” documents in the collection.\*
- Icon 5. You can click here to view the document’s history (information on when the document was viewed, annotated, downloaded, edited, printed, tagged, and so on).

\*If you click the second, third or fourth icon (for similar documents and near duplicates), CloudNine will execute a search for those documents and open the results in a new window so you won’t lose your current place in the database.

## 2.2 – Native Tree View

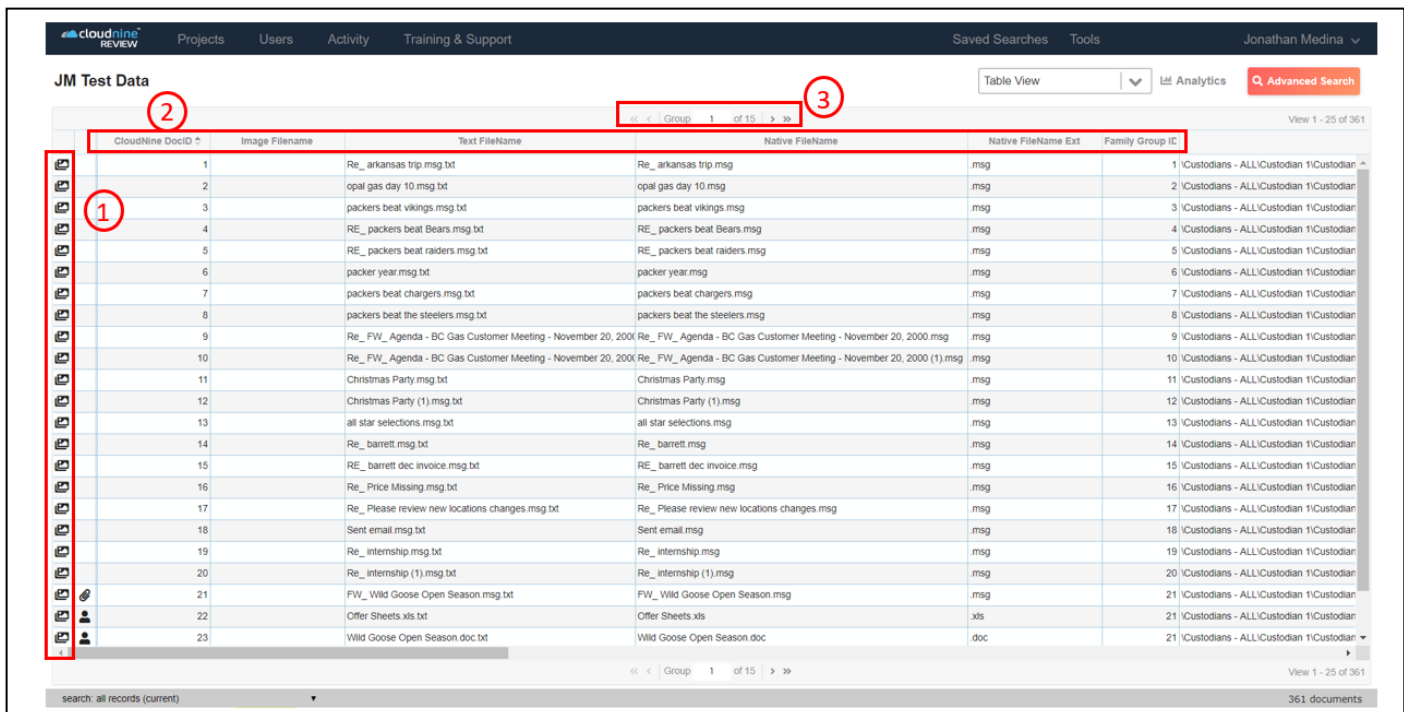
Native Tree View is one of the alternative views offered by CloudNine. Native Tree View shows the folder path for individual documents, allowing for easy drill down by custodian or file path. Some functionality in this view is different than in Vertical Document List, but we will cover that later in the User guide, under that specific category. The only difference in layout between the Native Tree View and the Vertical Document List is that the folder path replaces the document list, as seen in [Figure 19](#) below. *Native Tree View can be accessed through the Tools Menu.*

The screenshot displays the CloudNine Native Tree View interface. On the left, a tree view shows a hierarchy of folders under 'Custodians - ALL', including 'Custodian 1 - email.pst', 'south-s\_000', 'south-s', and 'Custodian 1 - loose files'. The central pane shows a document preview titled 'eDiscovery is Disrupting Lawyers' Ability to Generate Billable Work' in HTML format. The right pane displays metadata for the document, including 'Image FileName', 'CloudNine DocID', 'Text FileName', 'Native FileName', 'Native FileName Ext', 'Family Group ID', 'Original Path', 'File Size', 'To', 'From', 'CC', and 'BCC'. The document content includes sections for 'Challenge 1: eDiscovery is Disrupting Lawyers' Ability to Generate Billable Work', 'Challenge 2: Becoming more challenging to compete with other lawyers', 'Solution 1: Leverage technology to manage costs', and 'Solution 2: Align with a team of experts and trusted advisors (in-house or vendor)'. The interface also shows a search bar at the bottom left and a document count of 361 at the bottom right.

Figure 19

## 2.3 Table View

Table view is an entirely different way to view documents, than Vertical Document List or Native Tree View, and as such, has its own specific uses that will make reviewing easier. The Functionality on this view is the most different than Vertical Document list, and as with Native Tree View, we will cover that later in the User guide, under that specific category. The difference between the layout of Vertical Document List and Table View is fairly extreme. This view is ideal for use with two monitors, giving you the ability to review the metadata on one monitor and the document on the other. When the Table View is loaded, you will see a series of rows and columns that contain all the metadata for each document. The metadata will be displayed in columns, and the documents in rows, as you can see in [Figure 20](#). *Table View can be accessed through the Tools Menu.*



CloudNine DocID	Image Filename	Text FileName	Native FileName	Native FileName Ext	Family Group ID
1	Re_ arkansas trip.msg.txt	Re_ arkansas trip.msg	Re_ arkansas trip.msg	.msg	1 Custodians - ALL Custodian 1 Custodian
2	opal gas day 10.msg.txt	opal gas day 10.msg	opal gas day 10.msg	.msg	2 Custodians - ALL Custodian 1 Custodian
3	packers beat vikings.msg.txt	packers beat vikings.msg	packers beat vikings.msg	.msg	3 Custodians - ALL Custodian 1 Custodian
4	RE_ packers beat Bears.msg.txt	RE_ packers beat Bears.msg	RE_ packers beat Bears.msg	.msg	4 Custodians - ALL Custodian 1 Custodian
5	RE_ packers beat raiders.msg.txt	RE_ packers beat raiders.msg	RE_ packers beat raiders.msg	.msg	5 Custodians - ALL Custodian 1 Custodian
6	packer year.msg.txt	packer year.msg	packer year.msg	.msg	6 Custodians - ALL Custodian 1 Custodian
7	packers beat chargers.msg.txt	packers beat chargers.msg	packers beat chargers.msg	.msg	7 Custodians - ALL Custodian 1 Custodian
8	packers beat the steelers.msg.txt	packers beat the steelers.msg	packers beat the steelers.msg	.msg	8 Custodians - ALL Custodian 1 Custodian
9	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000	.msg	9 Custodians - ALL Custodian 1 Custodian
10	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000	(1).msg	10 Custodians - ALL Custodian 1 Custodian
11	Christmas Party.msg.txt	Christmas Party.msg	Christmas Party.msg	.msg	11 Custodians - ALL Custodian 1 Custodian
12	Christmas Party (1).msg.txt	Christmas Party (1).msg	Christmas Party (1).msg	.msg	12 Custodians - ALL Custodian 1 Custodian
13	all star selections.msg.txt	all star selections.msg	all star selections.msg	.msg	13 Custodians - ALL Custodian 1 Custodian
14	Re_ barrett.msg.txt	Re_ barrett.msg	Re_ barrett.msg	.msg	14 Custodians - ALL Custodian 1 Custodian
15	RE_ barrett dec invoice.msg.txt	RE_ barrett dec invoice.msg	RE_ barrett dec invoice.msg	.msg	15 Custodians - ALL Custodian 1 Custodian
16	Re_ Price Missing.msg.txt	Re_ Price Missing.msg	Re_ Price Missing.msg	.msg	16 Custodians - ALL Custodian 1 Custodian
17	Re_ Please review new locations changes.msg.txt	Re_ Please review new locations changes.msg	Re_ Please review new locations changes.msg	.msg	17 Custodians - ALL Custodian 1 Custodian
18	Sent email.msg.txt	Sent email.msg	Sent email.msg	.msg	18 Custodians - ALL Custodian 1 Custodian
19	Re_ internship.msg.txt	Re_ internship.msg	Re_ internship.msg	.msg	19 Custodians - ALL Custodian 1 Custodian
20	Re_ internship (1).msg.txt	Re_ internship (1).msg	Re_ internship (1).msg	.msg	20 Custodians - ALL Custodian 1 Custodian
21	FW_ Wild Goose Open Season.msg.txt	FW_ Wild Goose Open Season.msg	FW_ Wild Goose Open Season.msg	.msg	21 Custodians - ALL Custodian 1 Custodian
22	Offer Sheets.xls.txt	Offer Sheets.xls	Offer Sheets.xls	.xls	21 Custodians - ALL Custodian 1 Custodian
23	Wild Goose Open Season.doc.txt	Wild Goose Open Season.doc	Wild Goose Open Season.doc	.doc	21 Custodians - ALL Custodian 1 Custodian

Figure 20

### Three Things to Know about Table View: (see Figure 18)

- 1) The button on the left hand side opens your document in another window.
- 2) All the columns are sortable by Metadata, either Ascending or Descending
- 3) You can change groups by clicking the next arrow on the top or bottom Group selection bar.

# **Section 3:**

## **Searching**

### 3.1 – How to Perform a Basic Search

To perform a search, click the *Advanced Search* button in the tool bar at the top of the screen: (see Figure 21)

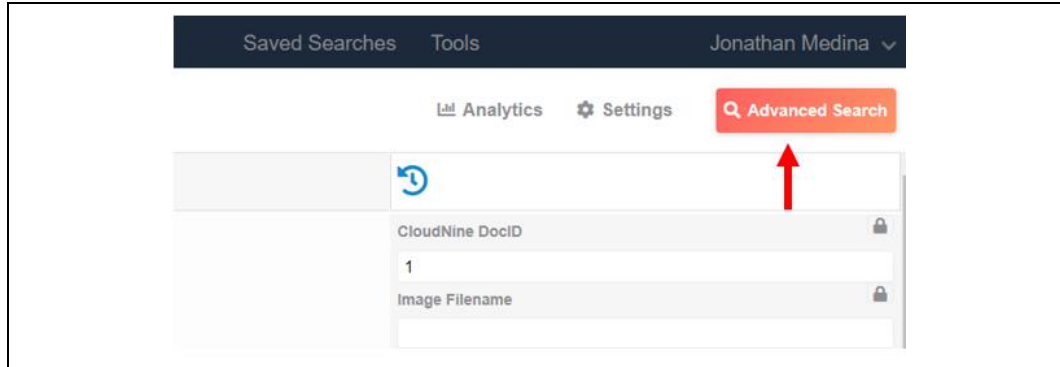


Figure 21

The project search screen will open (the numbered points in Figure 22 correspond to the search steps described below)

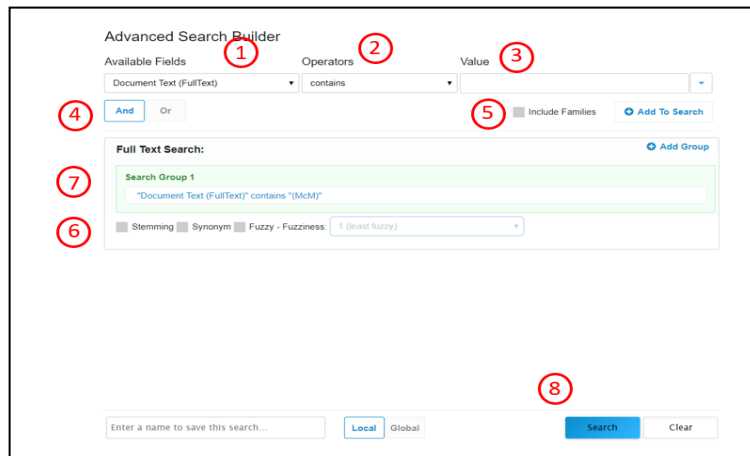


Figure 22

**Follow these steps to perform a search:**

1. Select a field from the *available fields* drop down list. Select *Document Text (Full Text)* if you want to search the full text of the documents.

2. Select an operator from the *operators* drop down list. Values on the operator list will depend on the field that is selected. For example, here's the operator list for the From field: (see Figure 23)

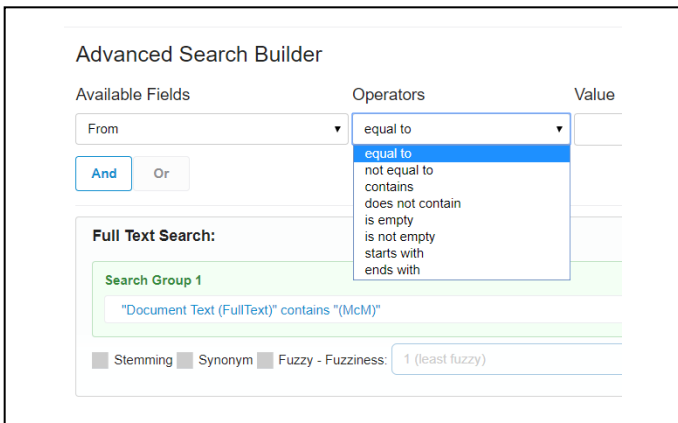


Figure 23

3. Enter the term on which you are searching in the *value* box. Note that when you enter a term, a list appears of terms in the database

that match the term you entered. The number in parentheses following a term on the list tells you the number of occurrences of the term in the database. In this example, I started entering the name "McMahon" in the From field: (See Figure 25)



Figure 25

At this point, I can simply select Scott Tanner from the list. The number in parenthesis next to the auto-populated value is the number of Hits for that particular value.

4. The *and* and *or* buttons are used when doing a Boolean search (that is, combining multiple search terms with an "And" or an "Or". You won't click either button for the first term you enter in a Boolean search. You'll move on to step 6. When you are building a search with multiple search terms, after entering the second (or third, fourth, etc.) search term, click the *And* or *Or* button, and continue with step 5.

5. Click the *Add to Search* button to enter the term you just selected into the search command.
6. When doing a full text search, you can do a stemming search, a synonym search, and/or a fuzzy search by selecting one or more of those options in the *full text searching options* box. Note that if you select fuzzy search, select the degree of fuzziness you are interested in from the drop down menu (the choices go from 1 to 10 with 1 being 'least fuzzy', 5 being 'moderately fuzzy' and 10 being 'very fuzzy').

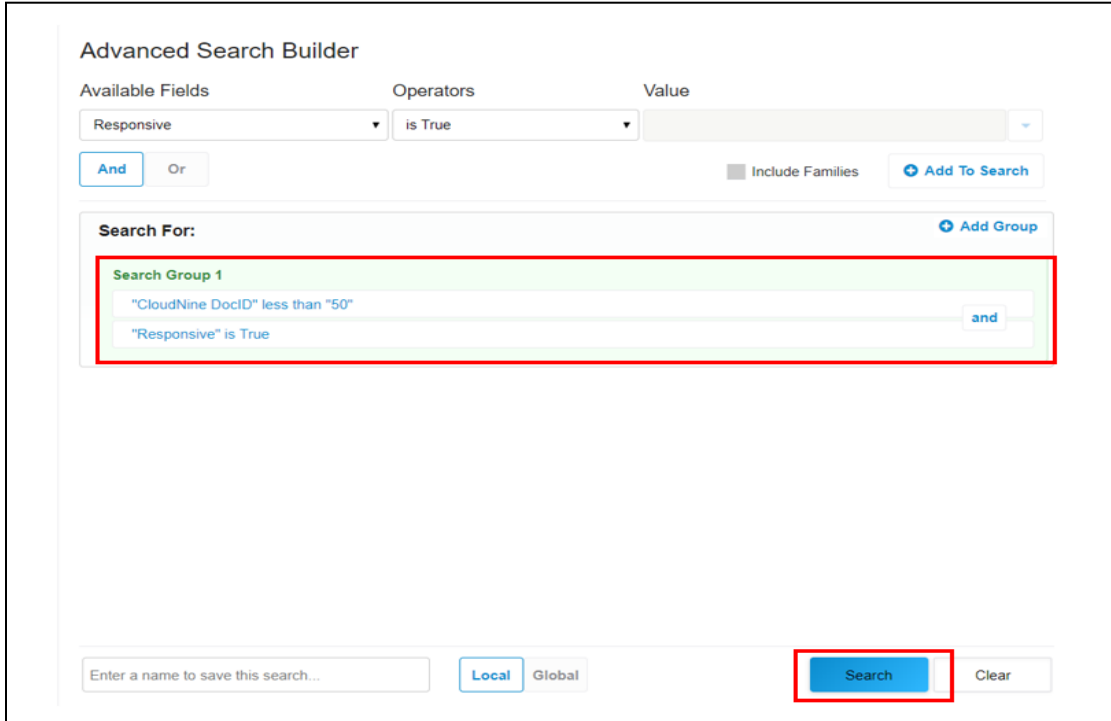


Figure 26

7. As you go through steps 1 through 4, you will “commit” the terms you enter to a search in step 5 by clicking the *Add to Search* button. As you include terms, they will appear in the *Search For* box in this step. Before executing a search, review this box to ensure the search syntax is complete and accurate. (See Figure 26)
8. When you’ve finished building the search you wish to execute, click the *Search* button. (See Figure 26)

After you execute a search, you’ll be brought back to the Database Main Page with your data displayed in the currently accessed view.



## 3.2 – Navigating your Search Results

For the purpose of this section, we are going to assume that you are set on the default Vertical Document List View.

The document list in the left frame will now include only the documents retrieved in your search. The number of documents that were retrieved will appear in the bottom right hand corner of the screen. (see Figure 27)

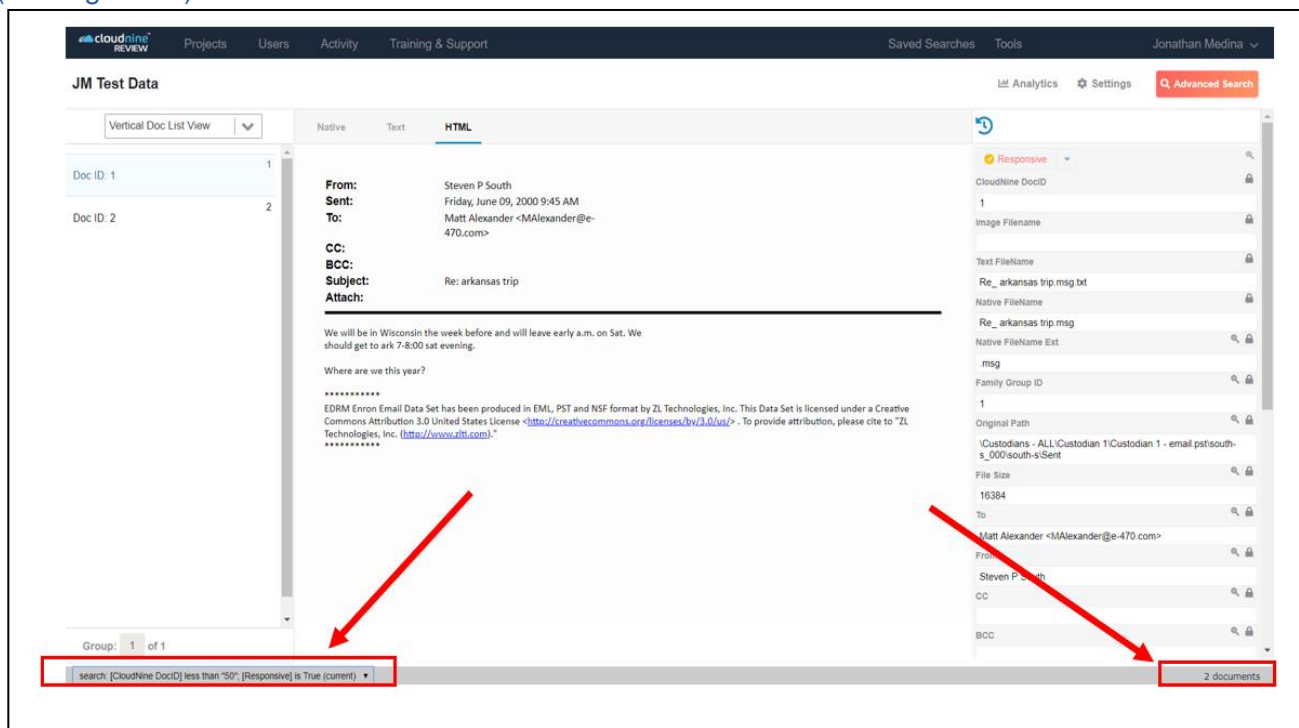


Figure 27

The Current search parameters are also displayed on the bottom left of the screen. (see Figure 27)

If you've done a full text search, hits will be highlighted in the Text tab. In this example, I searched on the term "petroleum" and it highlighted the term in the text: (see Figure 28)

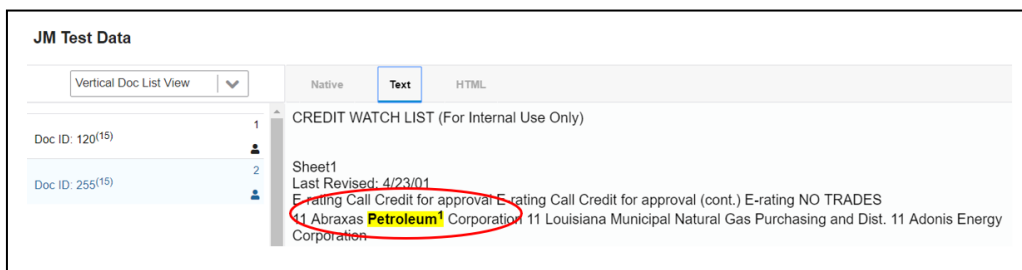


Figure 28

If you hover your cursor over the area at the bottom of the viewer screen, a hit navigation panel will appear so you can quickly navigate from one hit to another by clicking the left and right arrows: (see Figure 29)

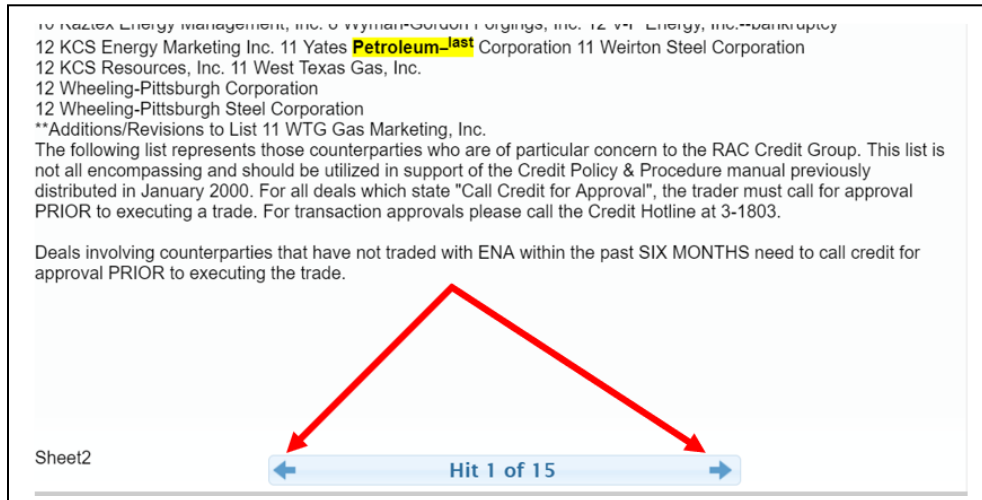


Figure 29

After doing a search, when you return to the search screen, the *Search Group 1* will be populated with your last search: (see Figure 30)

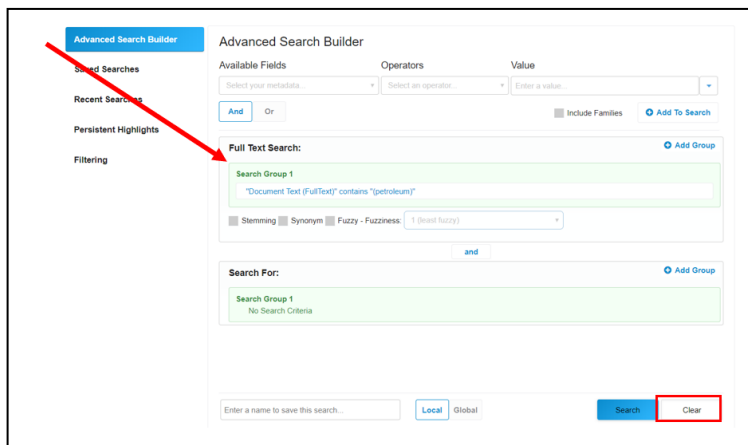


Figure 30

Click the *Clear* button in the bottom right corner before starting a new search. (see Figure 30)

### 3.3 – Recent and Saved Searches

You can easily get back to recent searches you've done: (see Figure 31)

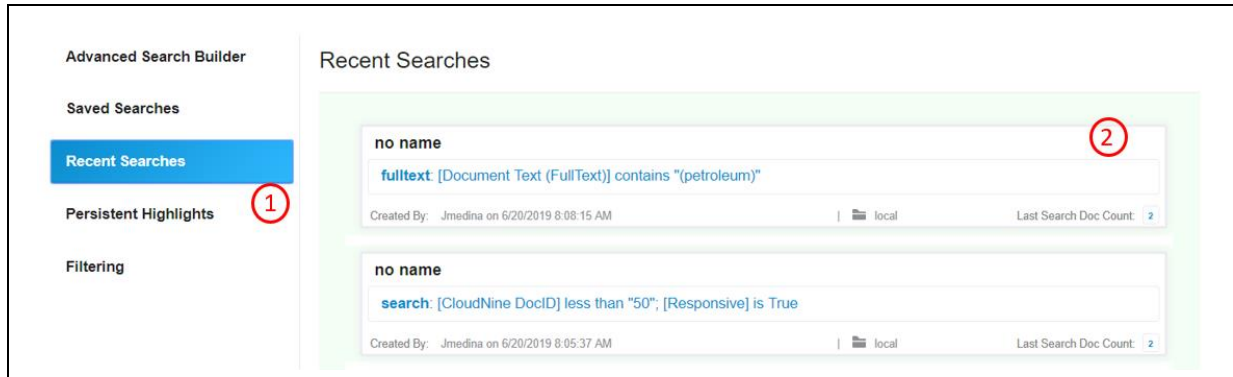
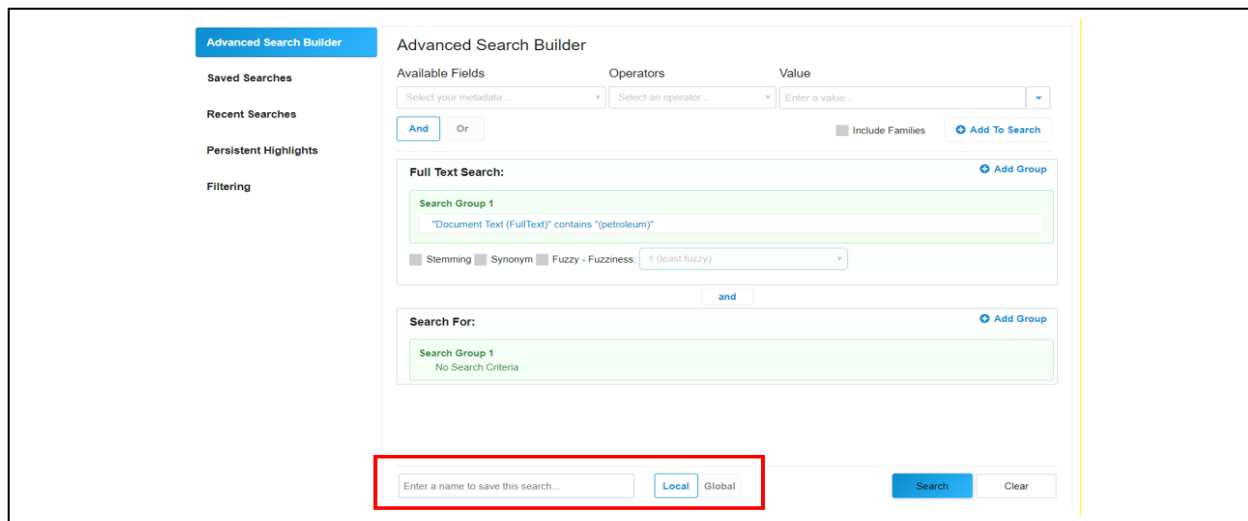


Figure 31

1. Click the *Recent Searches* button in the top left part of the search screen for a list.
2. Hover your cursor over the search of interest and an arrow will appear. Click it to re-execute the search.



Note that "recent searches" does not carry over from one login session to another. The list will only include recent searches within your current session.

Figure 32

You can, however, save searches that you may want to use again. Once you have entered in at least one search criteria the *Save Search Options* box will show: (see Figure 33)

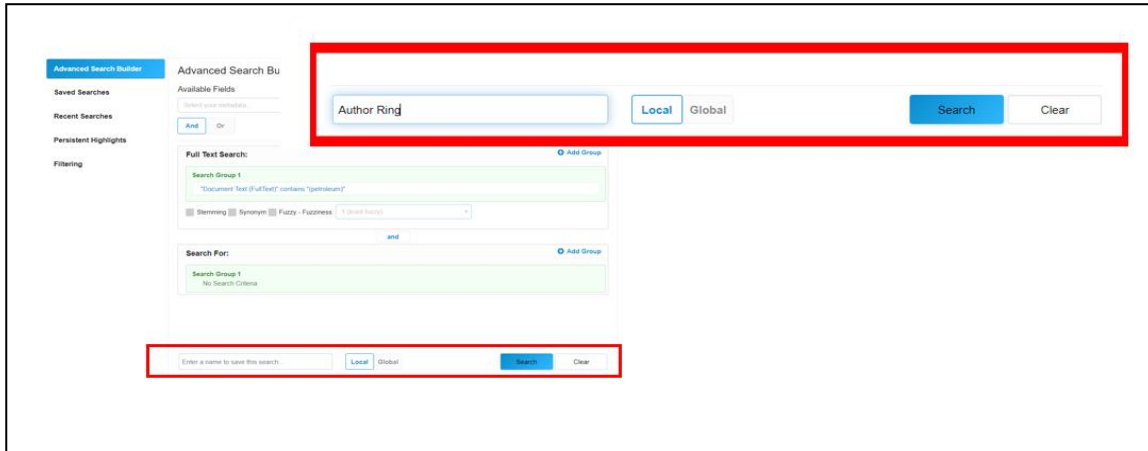


Figure 33

Give the saved search a name and click *Local* to save it for your own private use, or *Global* to save it for use by all users. Note, that the Saved Search function saves search commands, not search results. Once you've saved a search, you can re-launch it at any time, or you can edit it and then re-launch it.

In the top left corner of the search box, click the *saved searches* button for a list of saved searches. Hover your cursor over a search on the list and buttons will appear to re-launch the search, edit the search, or delete the search.

You can also access and launch saved searches from the database main page. Click the *Saved Searches* button at the top right of the screen for a list: (see Figure 34)

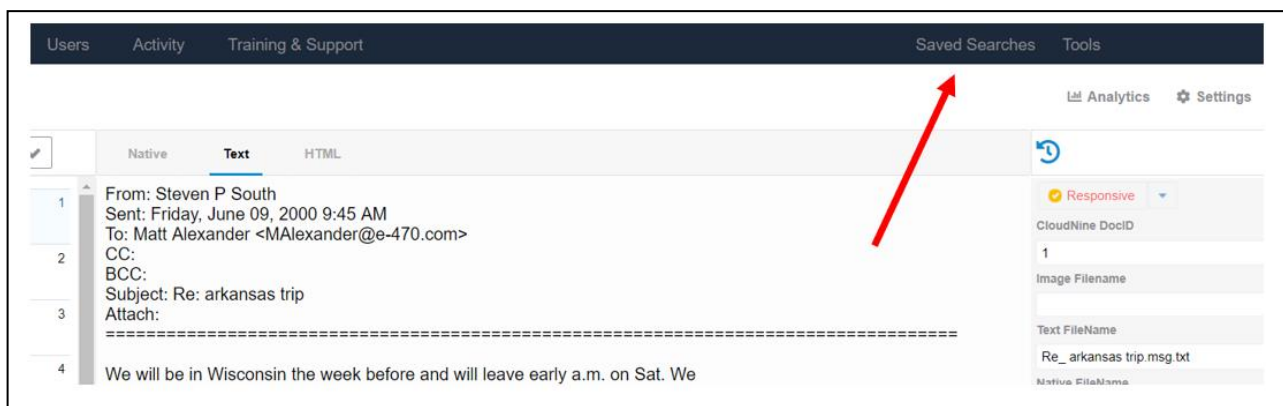


Figure 34

CloudNine also provides a Quick Search function. When a field is created, there's an option to make it a quick search field. On the database main page, hover the cursor over a field. If it's a quick search field, a search icon will appear: (see Figure 35)

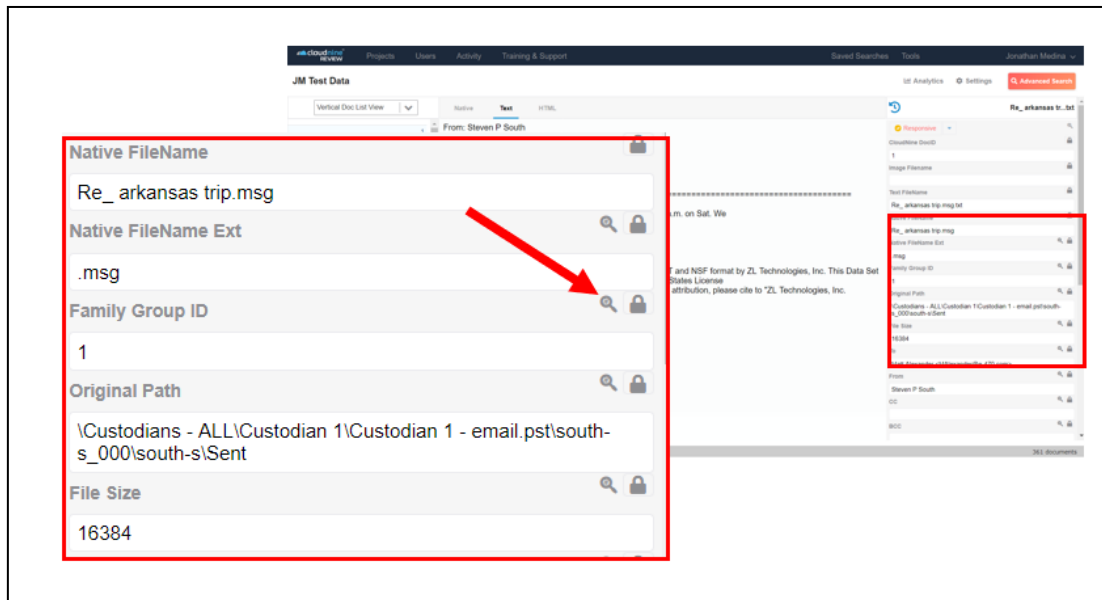


Figure 35

Click the search icon to search for the value in the field. In this example, CloudNine would search for all documents with a Family Group ID equal to 1.

# **Section 4:**

## **Working with Documents**

## 4.1 - Annotating and Manipulating Images

When viewing images, use the image tools panel to annotate, manipulate, re-size, redact, or print images. It permits these functions:

Pan	Delete
Zoom	Note
Best Fit	Highlight
Fit Width	Free Hand
Full Size	Confidential
Rotate	Privileged
Print	Black Redact
Save	White Redact

The image tools panel is found in the top right corner of the viewer frame. Click the *Image Tools* button to expand the list, and select a feature: (see Figure 36)



Figure 36

After selecting an annotation tool, drag your cursor back over the image and click in the appropriate area to execute the feature (for example, if you are redacting, click and drag a box around the area to redact).

## 4.2 – Creating Fields

Before a document can be tagged for a field, the tag field must first be created. You can create a field by accessing the “Modify Fields” in the Tools Menu located at the top right-hand portion of your screen. Then, click the New Field icon to add a new field.

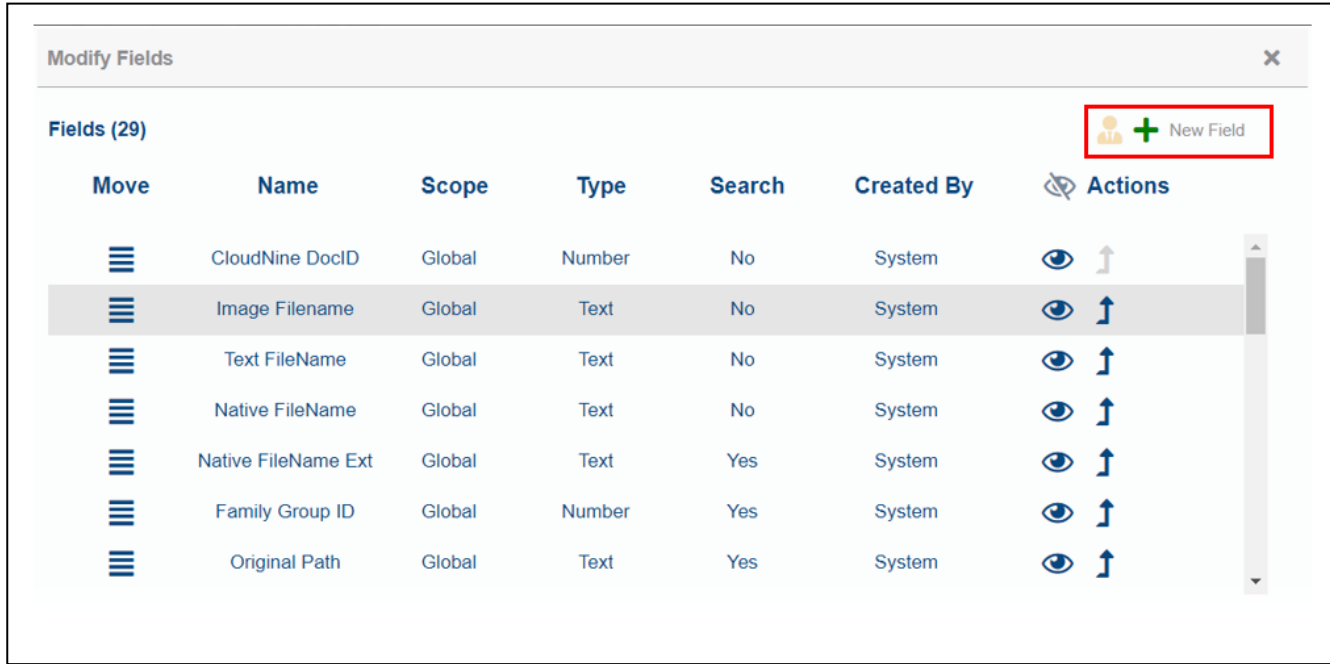


Figure 37

The New Field Option will open up a menu, where you can:

- Assign a Name to the Field
- Change the Field Scope to Global or Local
- Change the Field type
- Make the Field Quick-searchable

The Field Scope field determines who can and who cannot view your tag fields. Just like saved searches, global fields can be seen by everyone while Local fields can be seen only by you. You must have *Create Global Fields* rights set up by your administrator to be able to create global fields.

There are a variety of field types available for use in CloudNine, but the most commonly used, is the yes/no field. This is selected by default, and is used in all our examples throughout this Section.

Quick-Searchable fields will have the ability to launch a quick search directly from the document pane, by selecting the Magnifying glass next to the tag field. To see the magnifying glass, hover over the tag in question and click the magnifying glass to run the search: (See Figure 38 on Next Page)



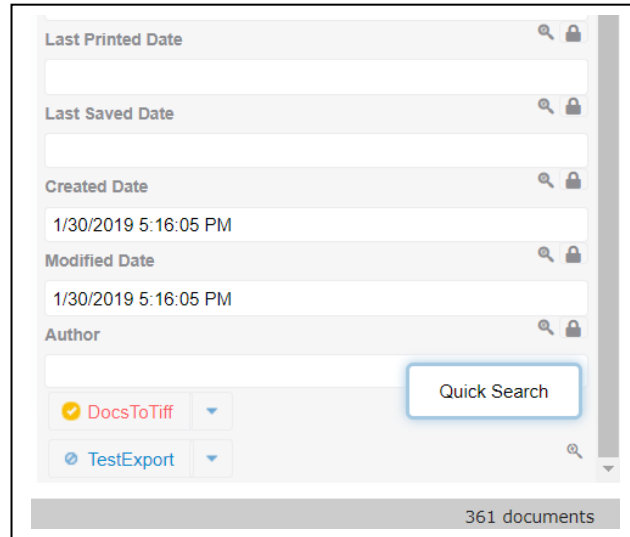


Figure 38

When the search is completed, a popup Quick Search window will appear in the center of the screen. You can navigate, tag and view documents related to that quick search inside this window without losing your place in the original search. (See Figure 39)

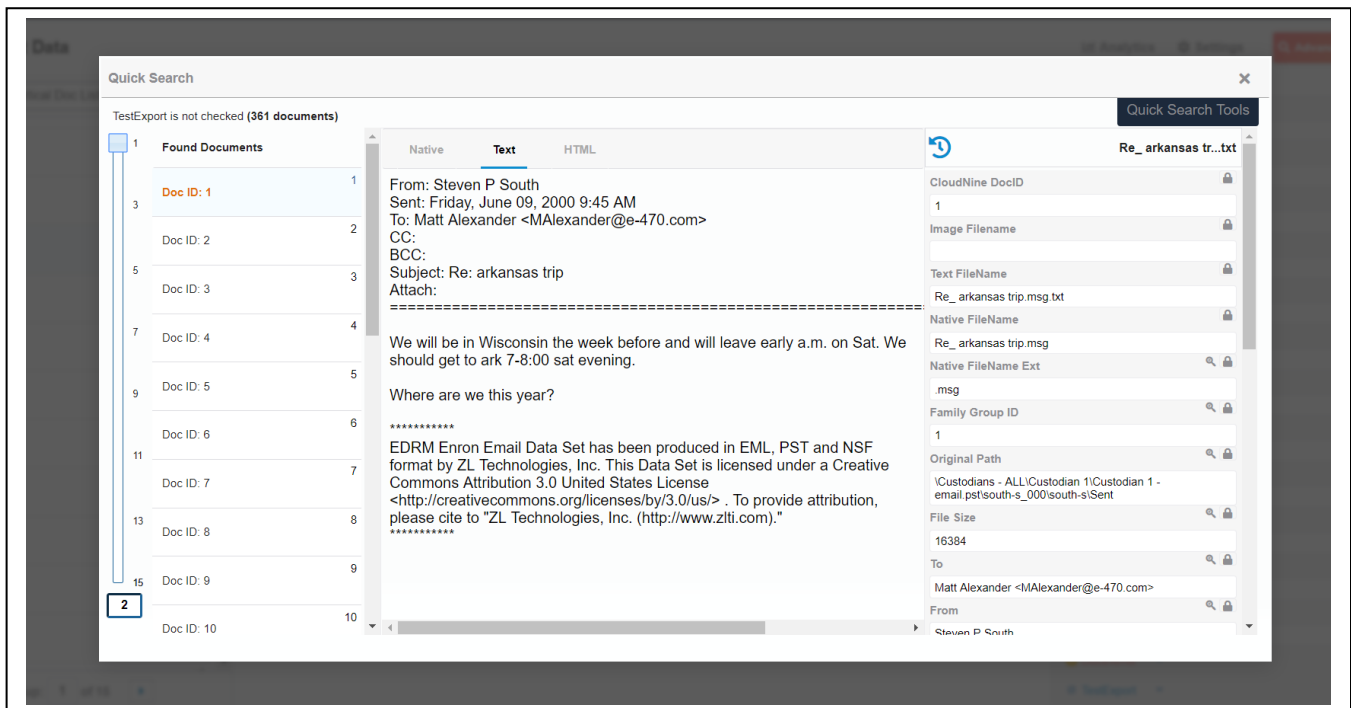


Figure 39

### 4.3 - Tagging Documents

A database may contain tag fields, for example, a “Privileged” tag field and a “Responsive” tag field. Tagging documents works the same way in every view available. To tag a document, click on the field. You can also click on the drop down arrow for tag options: (see Figure 40)

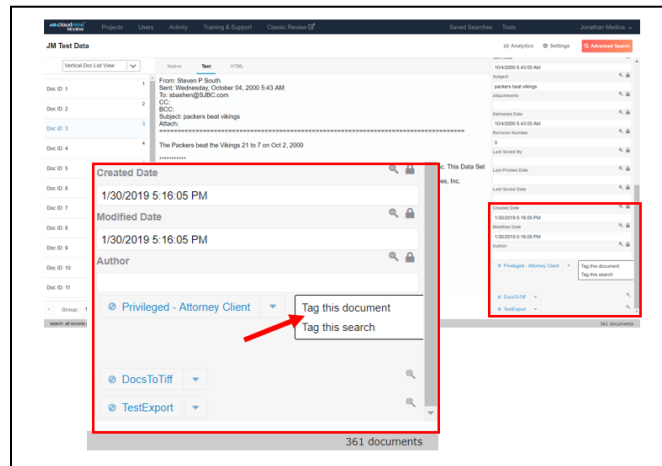


Figure 40

To tag the document you are viewing, select *tag this document* or simply click the tag itself. The document is tagged when the text turns orange, and the “Not” sign turns to a check mark. (See Figure 41)

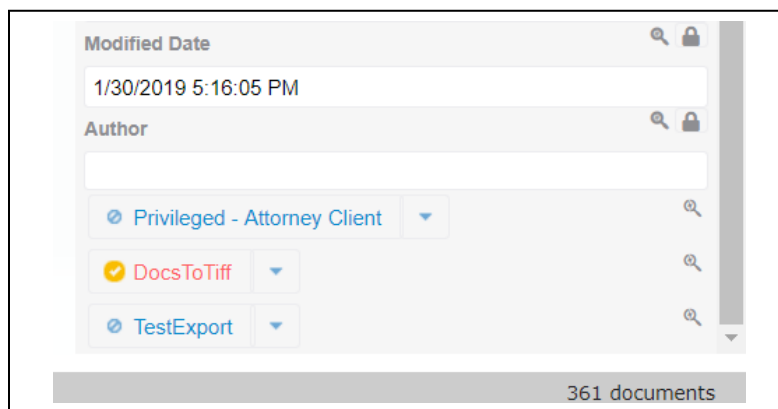


Figure 41

To tag all the documents on the current list, select *tag this search*. (See Figure 40) This option will open the Group Tag Menu that we will cover in Section 4.4 – Group Tagging Documents.

## 4.4 – Group Tagging Documents

Group Tagging allows users to tag an entire search worth of documents for a Tag field without having to tag them one by one. For example, this can be extremely helpful when trying to tag a certain set of documents for *Responsive* or *Non-Responsive*, or even help with sorting emails based on their “to” or “from” fields. You can access the Group Tag Documents option from the *Tools* menu at the top right of your screen.

There are three kinds of Group Tagging Available in CloudNine, which are shown in [Figure 42](#).

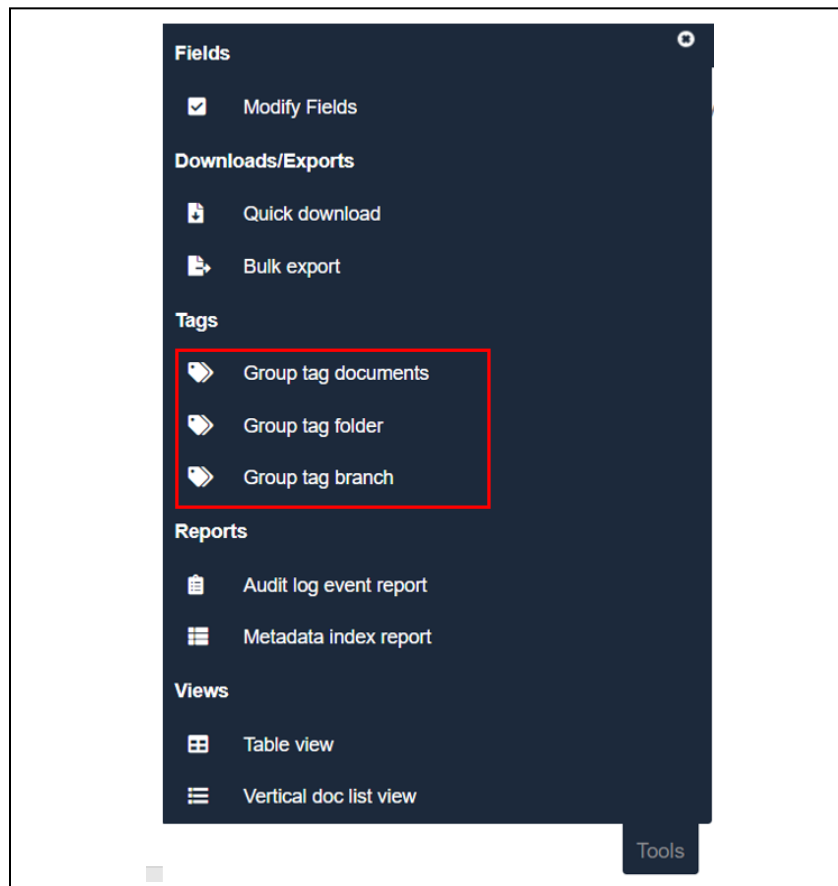


Figure 42

Group Tag Documents can be used in all three views, while Group Tag Folder and Group Tag Branch can be used in Native Tree View only.

## 4.4(a) – Group Tag Documents

When you select the Group Tag Documents option from the tools menu, a form will pop up in the middle of the screen: (See Figure 43)

Figure 43

The steps below correspond to the numbers in Figure 43.

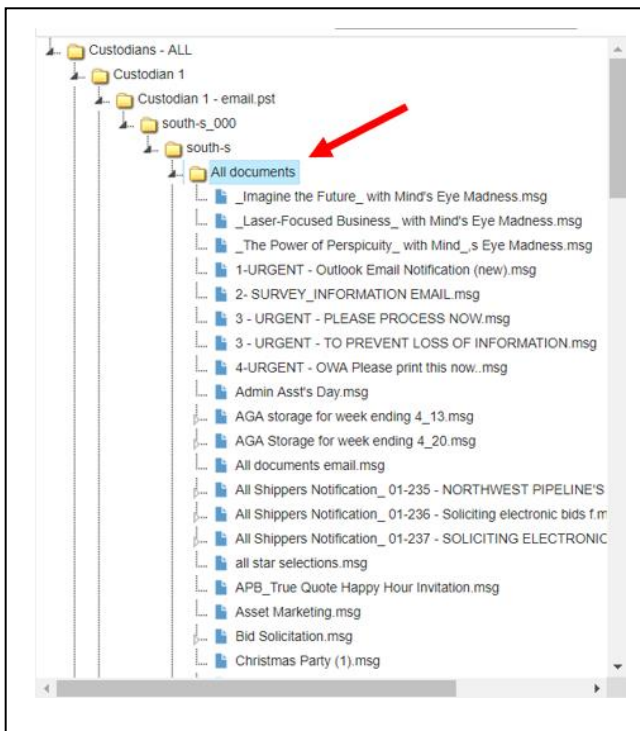
- Step 1. The first thing displayed is the warning that **this action is permanent and cannot be undone**. So, you should make absolutely sure you have selected the desired document set to be tagged.
- Step 2. A list of available fields is present to tag against. Only fields that you can see will be displayed to tag from. Choose the radio button next to the field you wish to tag and set the desired result to True or False. Currently only Yes/No Fields can be group tagged.
- Step 3. Choose whether to include family groups or not. Family groups are a list of documents that are directly linked to one another through parent-child relationships.
- Step 4. Verify the number of documents to be tagged. The original number will reflect the number of documents in the search, if you added family members, this will increase. If the Tag is correct, then click “Apply Tag” to apply it to the documents.

The documents in your search have been successfully tagged for the selected field. If you wish to undo your action simply follow the same steps, except change True to False. Note, this will remove the tag from ALL Documents in the search, meaning any documents you had tagged before the Group Tag will now be untagged.

## 4.4(b) - Group Tag Folders and Branches

Group Tagging Folders and Branches works a bit differently than Group Tagging documents, especially in that it only works in Native Tree View. Group Tag Folder and Group Tag Branch both require the native path to be documented in the metadata.

**\*\* If there is no native path to the documents, or they were provided to you from the other side without a folder path in the load file, this view will be less than ideal.**



Selecting the Group Tag Folder option from the menu will open up the same menu as the Group Tag Documents option, but the functionality of the Tag will be different. Instead of applying it to the *entire search*, the tag will only be added to the documents *inside of the currently selected folder*. (See Figure 44)

Selecting Group Tag Branch, will again open the same menu as Group Tag Documents, but instead of applying the tag to the search, it will apply the tag to every document within the *currently selected folder and all the additional folders contained within the currently selected folder*.

Figure 44

# **Section 5:**

## **Administrative Functions**

## 5.1 - Downloading Documents

To download a document to your computer, select *quick download* from the tools menu: (See Figure 45)

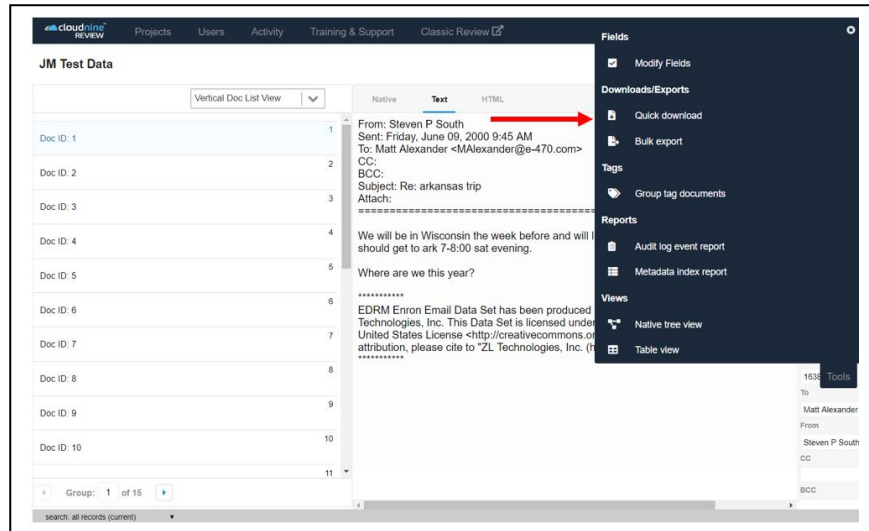


Figure 45

If you are currently viewing an image of the document when selecting download, an options box will appear that lets you choose to download the document with annotations and/or redactions. It also lets you choose to download the current page, the entire document, or a range of pages. After making selections, click the “start download” button and the document will download to your computer.

## 5.2 - Generating Reports

You can generate and download a report of the data that's been recorded for the documents. Do a search so the document list includes only those documents to be included in the report. Select *metadata index report* from the Tools menu: (See Figure 46)

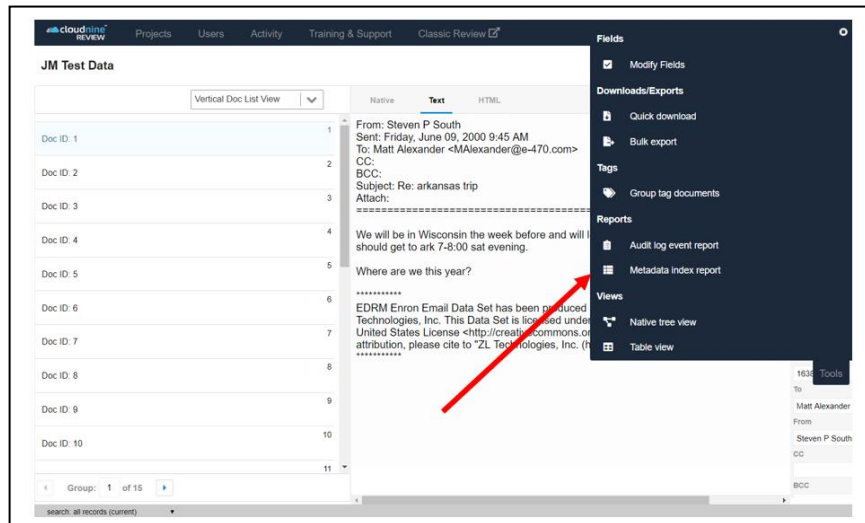


Figure 46

In the *Metadata Index Report* box, enter a name for the report, select the fields to be included in the report, select the field on which you want the report to sort, and choose whether you want to view it in the browser, or download it as a .csv or .dat file.: (See Figure 47)



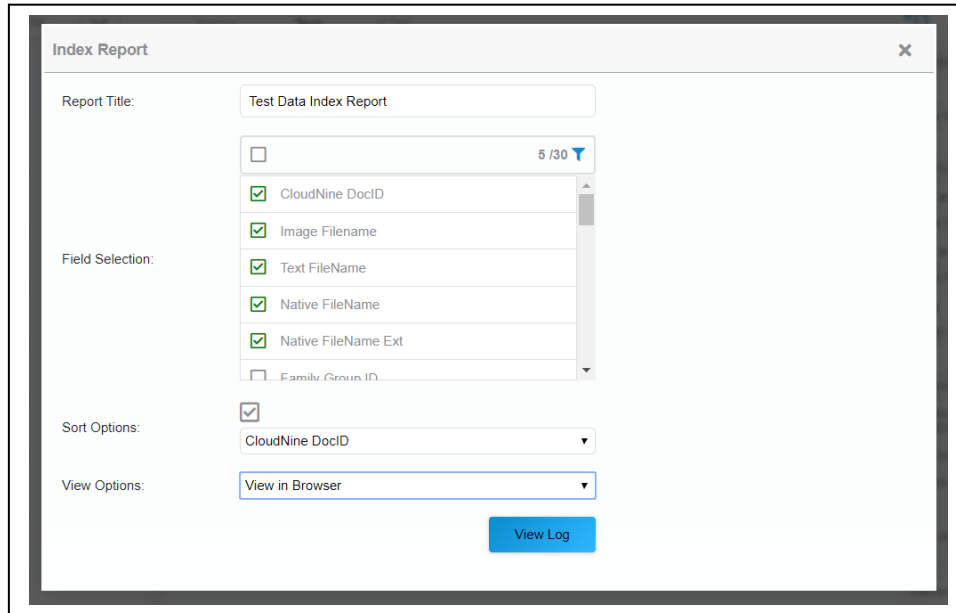


Figure 47

Click the *View Log* at the bottom of the screen to see the report.

**JM Test Data Index Report**  
 Project: JM Test Data  
 Record Count: 361  
 Created By: Jonathan Medina  
 Created On: 6/23/2019 10:05:27 PM

[download CSV file](#) [download DAT file](#)

DocNumber	ImageFileName	TextFileName	NativeFileName	FileExt
1		Re_ arkansas trip.msg.txt	Re_ arkansas trip.msg	.msg
2		opal gas day 10.msg.txt	opal gas day 10.msg	.msg
3		packers beat vikings.msg.txt	packers beat vikings.msg	.msg
4		RE_ packers beat Bears.msg.txt	RE_ packers beat Bears.msg	.msg
5		RE_ packers beat raiders.msg.txt	RE_ packers beat raiders.msg	.msg
6		packer year.msg.txt	packer year.msg	.msg
7		packers beat chargers.msg.txt	packers beat chargers.msg	.msg
8		packers beat the steelers.msg.txt	packers beat the steelers.msg	.msg
9		Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000.msg.txt	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000.msg	.msg
10		Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000 (1).msg.txt	Re_ FW_ Agenda - BC Gas Customer Meeting - November 20, 2000 (1).msg	.msg
11		Christmas Party.msg.txt	Christmas Party.msg	.msg
12		Christmas Party (1).msg.txt	Christmas Party (1).msg	.msg
13		all star selections.msg.txt	all star selections.msg	.msg
14		Re_ barrett.msg.txt	Re_ barrett.msg	.msg
15		RE_ barrett dec invoice.msg.txt	RE_ barrett dec invoice.msg	.msg
16		Re_ Price Missing.msg.txt	Re_ Price Missing.msg	.msg
17		Re_ Please review new locations changes.msg.txt	Re_ Please review new locations changes.msg	.msg
18		Sent email.msg.txt	Sent email.msg	.msg
19		Re_ internship.msg.txt	Re_ internship.msg	.msg
20		Re_ internship (1).msg.txt	Re_ internship (1).msg	.msg
21		FW_ Wild Goose Open Season.msg.txt	FW_ Wild Goose Open Season.msg	.msg
22		Other Sheets.xls.txt	Other Sheets.xls	.xls
23		Wild Goose Open Season.doc.txt	Wild Goose Open Season.doc	.doc
24		BLS Summary.doc.txt	BLS Summary.doc	.doc
25		Storage Services Agreement.doc.txt	Storage Services Agreement.doc	.doc
26		internship.msg.txt	internship.msg	.msg

Figure 48

If you are viewing the report in the browser, click *download CSV file* or *download DAT file* in the top right corner to download the report to your computer. (See Figure 48)

## 5.3 Export Request Form

There are two ways to produce data out of CloudNine. First, the Production Request Form, can be found on the Training & Support Menu, and will send the required information directly to Client Services, who will begin the production process for you. The second method, the Bulk Export Utility, will be covered in length in Section 5.4.

We recommend using the Production Request Form if:

- You wish to have special processing on the export.
- The export is large (over 4 GB in size).
- You wish to produce this data set to the other side with agreed-upon specifications
- You have a reseller who handles your exports for you.
- You are unsure about any step in the Bulk Export Utility.

To access the Production Request Form, go to the Support tab in the Database main screen Navigation Bar and click Export Request Form: (see Figure 49)

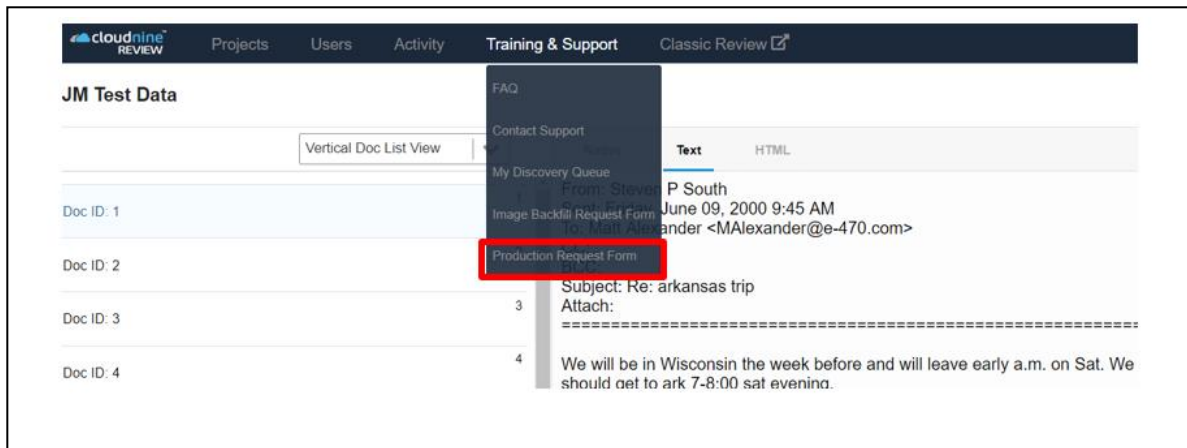


Figure 49

Once you click the Production Request Form, a pop-up form will appear: (See Figure 50)

**Production Request Form** ✕

The following questions are used to assist in the preparation of productions from CloudNine™. Please provide as much detail as possible in order to facilitate a timely and accurate production.

**Production Information:**

Typical turnaround time for a production request is 48 hours. Turnaround time depends on the size and complexity of the production request. After the production request has been submitted, you will be notified whether or not your deadline can be met. Production requests submitted after 6PM Central Time will be processed the next business day.

Database Name:  Date Needed:

---

**Contact Information:**

Contact Name:  Phone Number:

Company/Firm:  Email Address:

---

**Search Information:**

Please provide the name of the Global Tag field or Global Saved Search used for the production. Do not change the value of the Global Tag field or Global Saved Search for any documents until production is complete.

Global tag field to search:  OR Global saved search:

Figure 50

## 5.4 Bulk Export Utility

If you would rather handle your own export and production of documents, the Bulk Export tool will allow you to export documents and document data in several forms. Through Bulk Export you can export:

- Native documents
- Document text
- Metadata
- Images in Tiff or PDF Form
- Load Files for Production

The Bulk Export tool is not a correct fit for every export and has its own set of limitations.

To get to the Bulk Export Utility, click on the tool bar on the upper right hand of the screen: (see [Figure 51](#))

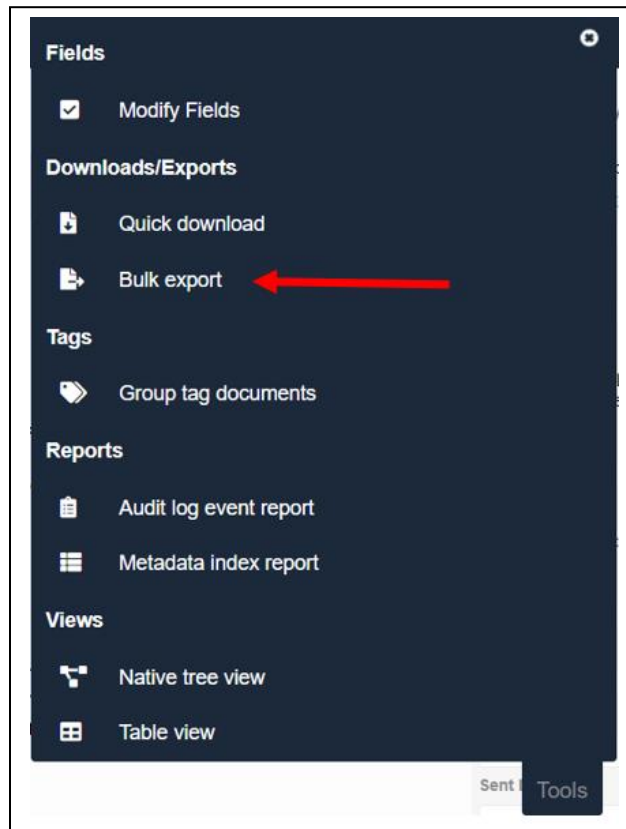
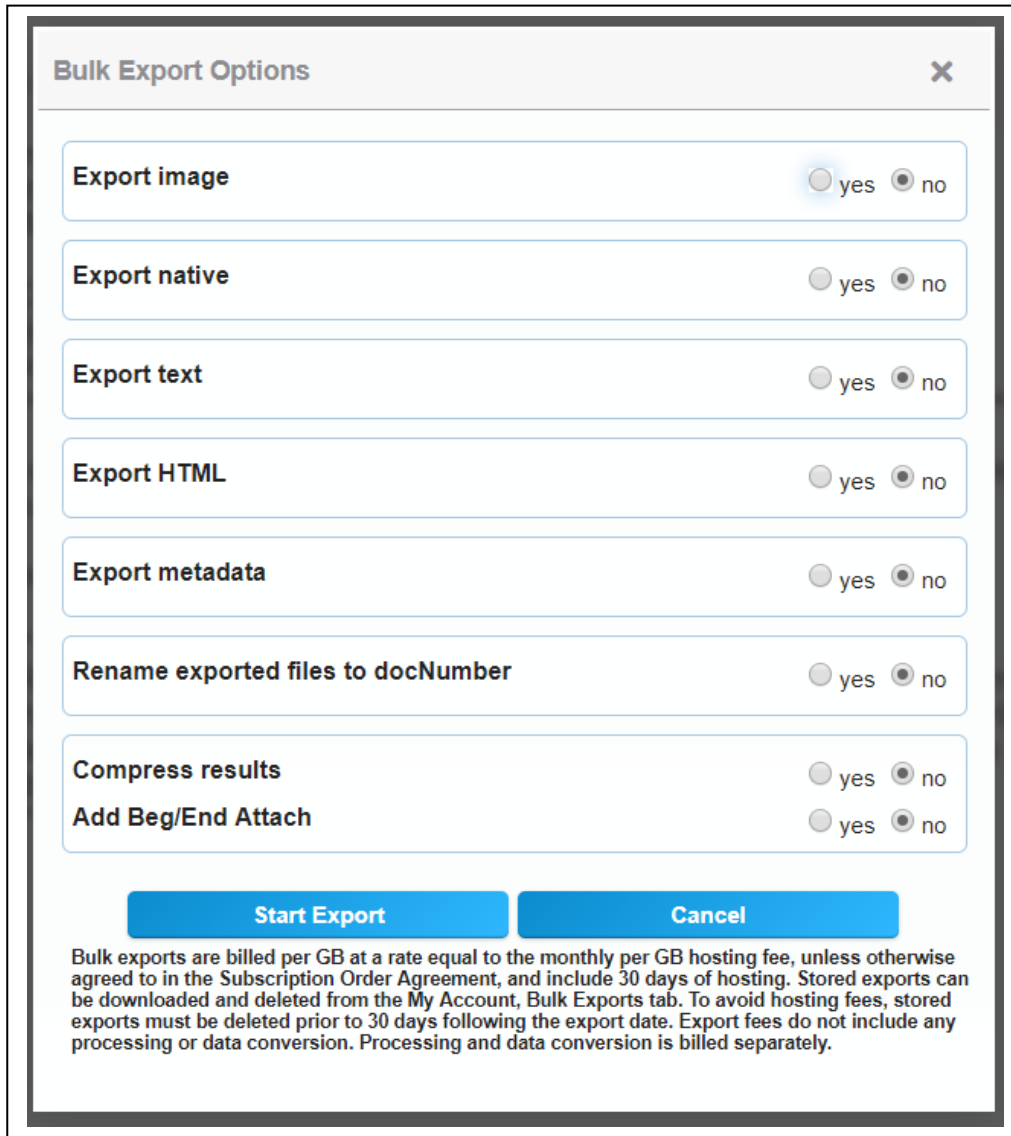


Figure 51

This will open up a pop-up form that gives you the options for creating your export. (See Figure 52)



The image shows a pop-up window titled "Bulk Export Options" with a close button (X) in the top right corner. The window contains several rows of options, each with a label and two radio buttons for "yes" and "no". The "no" option is selected for all options. At the bottom, there are two blue buttons: "Start Export" and "Cancel". Below the buttons is a paragraph of text providing details about billing and hosting for bulk exports.

Option	Yes	No
Export image	<input type="radio"/>	<input checked="" type="radio"/>
Export native	<input type="radio"/>	<input checked="" type="radio"/>
Export text	<input type="radio"/>	<input checked="" type="radio"/>
Export HTML	<input type="radio"/>	<input checked="" type="radio"/>
Export metadata	<input type="radio"/>	<input checked="" type="radio"/>
Rename exported files to docNumber	<input type="radio"/>	<input checked="" type="radio"/>
Compress results	<input type="radio"/>	<input checked="" type="radio"/>
Add Beg/End Attach	<input type="radio"/>	<input checked="" type="radio"/>

**Start Export** **Cancel**

Bulk exports are billed per GB at a rate equal to the monthly per GB hosting fee, unless otherwise agreed to in the Subscription Order Agreement, and include 30 days of hosting. Stored exports can be downloaded and deleted from the My Account, Bulk Exports tab. To avoid hosting fees, stored exports must be deleted prior to 30 days following the export date. Export fees do not include any processing or data conversion. Processing and data conversion is billed separately.

Figure 52

As you can see, you have a wide variety of export options available using the utility. The bullets below correspond to the different options you are given.

- Export Image – Exports the TIFF or PDF image of the document. Covered fully in Section 5.4(a)
- Export Native- Exports the native file version of your document, if the native is available.
- Export Text- Exports any extracted or OCR text, if available.
- Export Metadata- Exports a CSV or DAT file for metadata in your search. Covered fully in 5.4(b)
- Export – This document or all documents in current search.

## 5.4(a) Exporting Images

When you select to export images from CloudNine, a drop down menu will appear giving you a set of increased options. (See Figure 53)

**Bulk Export Options** [X]

**Export image**  yes  no  
export fees apply.

**Export with annotations**  yes  no

**Export with redactions**  yes  no

**Create LFP file**  yes  no

**Export as**  tiff  pdf

**Image options**  single page  multi-page  
per page charges apply for conversion to multi-page images.

Figure 53

To burn in annotations and redactions, simply select the yes radio buttons listed next to each option on the menu. *Currently, the only way to include burned in redactions or annotations is to do an export, then reload the burned in images into CloudNine. If this is something that you need to do, please contact our Client Services department at (713)462-6464, and they will assign it a project number.*

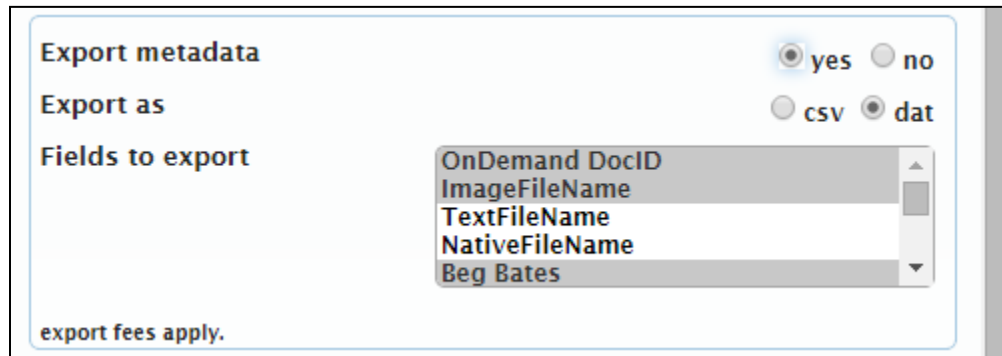
The next option, allows you to create a LFP file for your production. LFP files are compatible with IPRO and can be used to produce load ready data to the other side.

You can also choose which file type you would prefer your images exported as, tiff or pdf, as well as whether you want them to be Single or Multi-page documents. Note that there is an additional charge for conversion to Multi-page documents.

- Single Page Image option – Exports every page of a Document as an Individual Tiff Image. (1 document with 10 pages will have 10 separate tiff images)
- Multi-Page Image option – Loads every page of a Document into a single Tiff or PDF file. (1 document with 10 pages will have 1 tiff image file, with 10 pages inside it)

## 5.4(b) Exporting Metadata

Exporting metadata is another feature to our Bulk Export utility. In order to export metadata, simply click the yes radio button next to Export Metadata and a menu will drop down. (See Figure 55)



The screenshot shows a user interface for exporting metadata. It includes three main sections: 'Export metadata' with radio buttons for 'yes' (selected) and 'no'; 'Export as' with radio buttons for 'csv' and 'dat' (selected); and 'Fields to export' which is a scrollable list containing 'OnDemand DocID', 'ImageFileName', 'TextFileName', 'NativeFileName', and 'Beg Bates'. A note at the bottom left states 'export fees apply.'

Figure 55

You can choose to export your metadata as a csv file or dat file. DAT files are primarily used by Concordance and other select Data Review software, so if your opposition will load into Concordance, you may need to export this option.

You can choose to export all fields, which is the default setting, or manually select the fields to export. As you see in Figure 52, we chose to export the CloudNine DocID, ImageFileName and Beg Bates field, but not the TextFileName or NativeFileName. There is also a scroll bar on the right of the fields to export box to allow you to view the full list of fields accessible in CloudNine.

## 5.4(c) Submitting Your Export

After you have chosen all the required selections, and your bulk export is ready to begin, select the “Start Export Button” at the bottom of the form.

The form will disappear and a pop-up will replace it, giving you the total number of pages that will export, and asking to confirm. (See Figure 56)

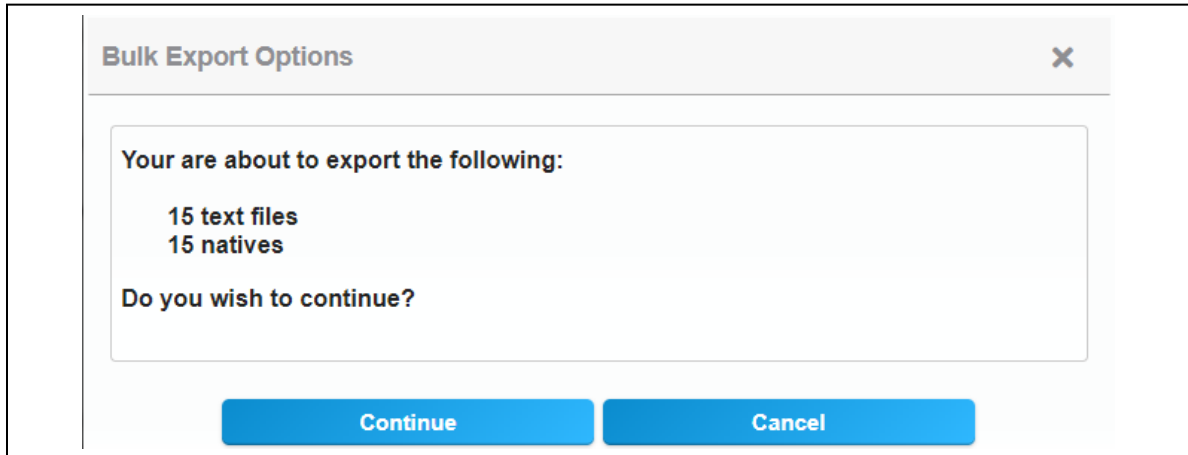


Figure 56

**\*Note\*** The document count and page count are rarely the same. What seems like a very small export due to the document count can become huge. Keep this in mind when scheduling your exports. The larger the export, the longer it will take, and the greater chance that it will exceed Export Limitations. The Bulk Export utility currently has a 4 Gigabyte limitation, for any exports over 4 gigabytes, please use the Production Request Form.

Select continue to begin your export. When begun, another pop-up message will display, telling you that it has begun and that you will receive an email when your export has completed. (See Figure 57)

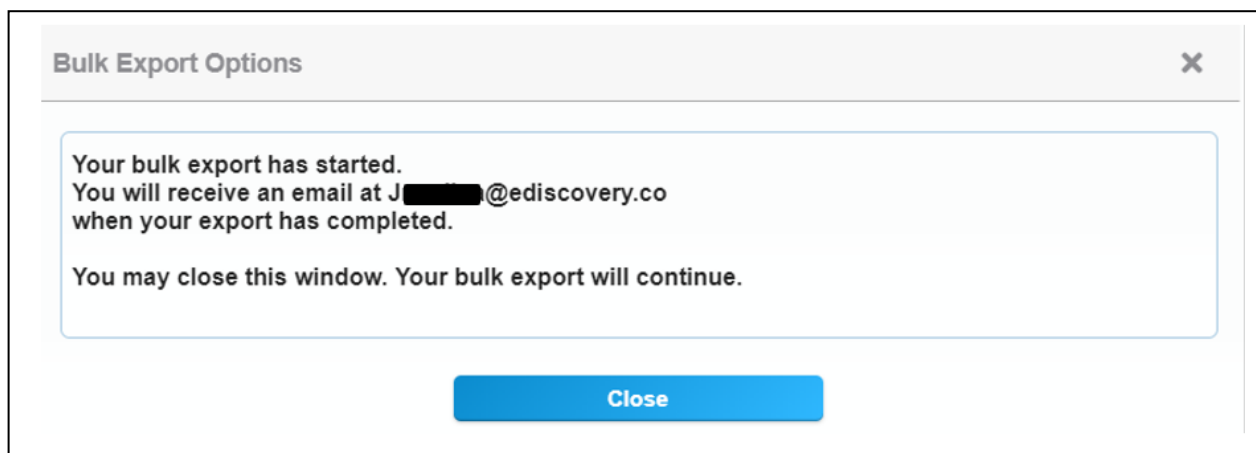


Figure 57



## 5.4(d) Managing your Exports

After you receive your notification email that your bulk export is ready, you need to be able to go download it. You can do so within the project by selecting Bulk Export within the Activity menu. (See Figure 58)

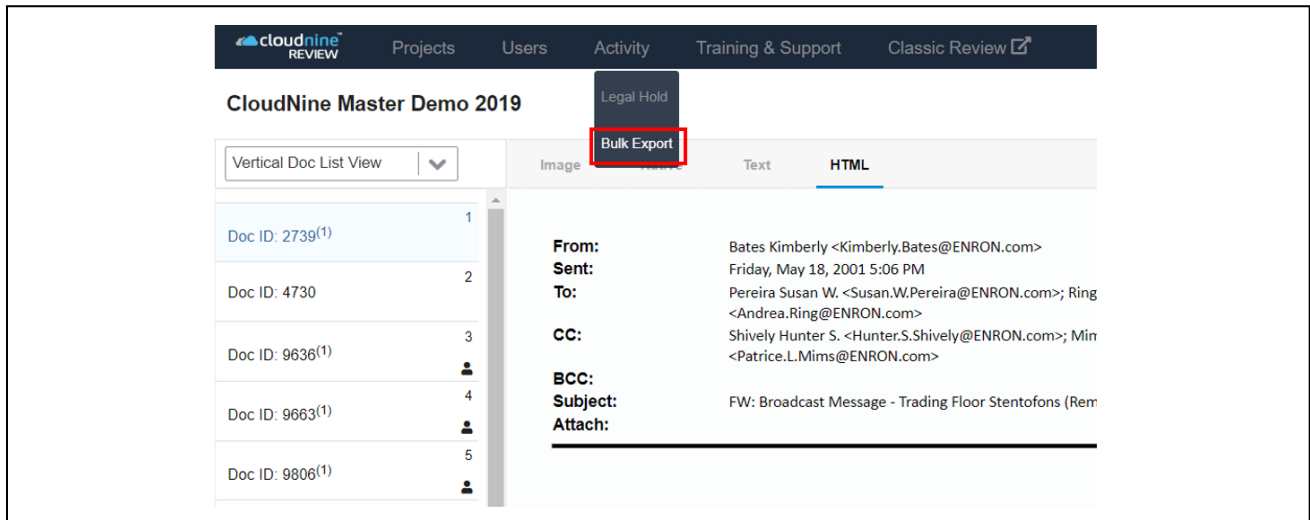


Figure 58

Clicking this button will pull up the list of Bulk Exports shown below in Figure 59:



Figure 59

This menu will give you all the information that you require about your export including the time stamp and size in MB. The First Symbol lets you download your bulk export, the second, lets you delete it. A hosting fee is charged for each bulk export hosted on the server per your contracted agreement.

## Thank you for reading the CloudNine User Guide!

If you have any other questions, or something in this guide is unclear to you, please do not hesitate to email us at:

[support@CloudNine.com](mailto:support@CloudNine.com)

or

Call during business hours @ 713-462-6464.

*Business hours are 9am to 5pm (CST) Monday through Friday for Telephone Support and 8am to 10pm (CST for email support). Any requests made after hours will be answered at the earliest convenience.*