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# QUICK START GUIDE

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## Data Uploads with CloudNine Discovery Portal

*A complete guide for uploading native and load file data into CloudNine Review, using CloudNine Discovery Portal.*

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# Introducing CloudNine Discovery Portal

CloudNine Discovery Portal is the gateway for transferring and processing your eDiscovery data into CloudNine applications. With simple, easy-to-use workflows you can upload and process raw, unprocessed eDiscovery data from its original state (email, e-doc, archives, forensic images, etc) or already processed eDiscovery data (load file ready) to CloudNine Review.

The CloudNine Discovery Portal workflow streamlines uploading and processing steps and provides status emails during each phase of processing.

## System/Internet Requirements

Check [system requirements](#) for minimum setting recommendations for CloudNine Discovery Portal. You will need the following:

- 64-bit operating system.
- 10/100 Mbps. Gigabit recommended.

**NOTE:** 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 upload speed.

## Installing CloudNine Discovery Portal

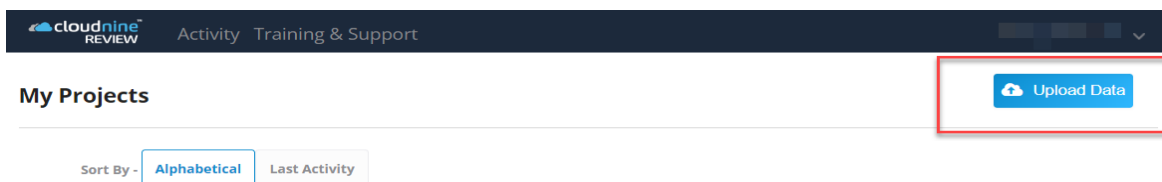
The CloudNine Discovery Portal download is available on the **My Project** page of CloudNine Review. If you are new to CloudNine Review, see **First-time Login Instructions**. If you are an existing user, you can skip ahead to **Downloading CloudNine Discovery Portal**.

## First-Time Login to CloudNine Review

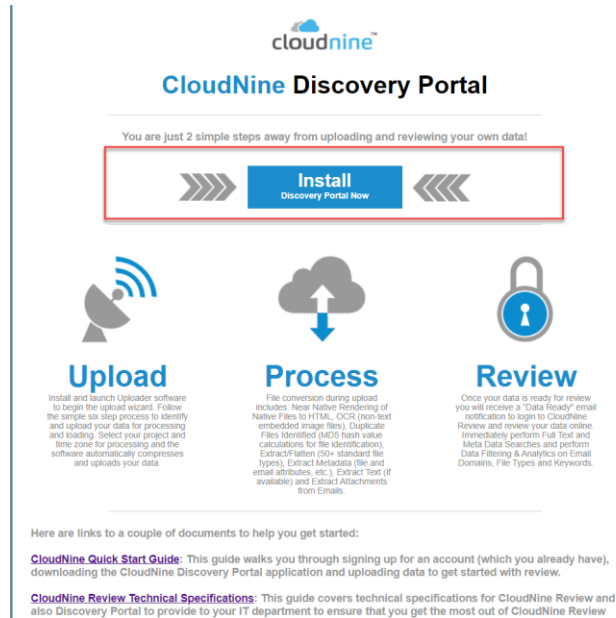
1. Your user account is created in CloudNine Review, you should receive an email providing a temporary password link. Click the link in the email to create a new password.
  - Alternatively, click <https://login.cloudnine.com/u/login/> to access the CloudNine Review login page.
2. On the **Welcome Login** screen, enter your **Email address**, then click **Continue**.
3. You are now on the **Enter Your Password** screen. If you know your **Password**, enter the password, then click **Continue**.
  - If you do not know the password, select **Forgot Password** and **Enter Your Email** address to receive a password reset email.
4. The first time you log in, you will set up your multi-factor authentication with **Auth0**. See the Knowledge Base article, [Creating Your Multi-Factor Authentication](#) for more detailed information on multi-factor authentication.

## Downloading CloudNine Discovery Portal

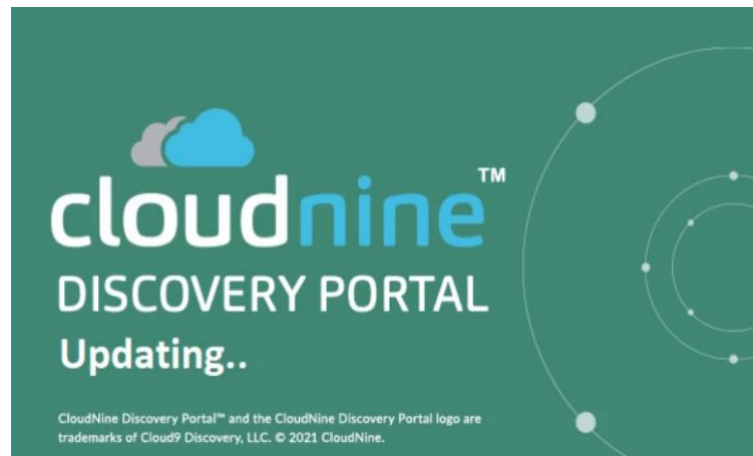
1. Click the link <https://login.cloudnine.com/u/login/> to access the login page of CloudNine Review.
2. Enter your **Email address** and click **Continue**.
3. Enter your **Password** and click **Continue**.
4. Verify Your Identity.
5. You are now on the **My Projects** page of CloudNine Review. Click the **Upload Data** option in the top right corner.



6. The CloudNine Discovery Portal Install page opens. Click **Install Discovery Portal Now** to download the installation.



7. The **Discovery.Portal.<version>.exe** downloads to your default download location. Navigate to your download location and double-click to initialize the self-installing executable.



8. First-time users receive the **End User License Agreement (EULA)**. Review the agreement and click **Accept** to proceed to the **CloudNine Discovery Portal Welcome** screen.

**NOTE:** CloudNine Discovery Portal is designed to be installed and launched at the **User** level. If you install or run as an Administrator, some features may not be available.

CloudNine Discovery Portal is **self-updating**. When launched, it verifies the version and will automatically be updated to the current version.

# Review and Prepare Your Data

As a best practice, you should always review your data. This will help you determine:

- **The type of data:** Do you have Native files (raw, unprocessed) or Load file (already processed) data?
- **Size of data:** How large is the data set you wish to upload?
- **How is the data organized?** Is data organized by volume, folders, custodian, etc?

The type, size, and organization of data can be used to determine how you wish to upload the data. Often, data is uploaded in “batches” based on a folder structure or custodian. There are many advantages to uploading the data in batches which include but are not limited to:

- Batches are typically smaller and will not take as long to upload.
- Review can begin when the first batch is uploaded and ready.
- If issues are encountered, it is easier to troubleshoot.

There is no limitation to the data size you upload through CloudNine Discovery Portal. For the reasons mentioned above, we do recommend organizing and uploading data in manageable batches.

CloudNine Review has a tree-view function that follows the file path of documents through folders and subfolders, which is also captured in the original path field in CloudNine Review. This is extremely useful when uploading in batches by custodian or folder.

The [Sending/Uploading Data to CloudNine Review](#) knowledge base article may be an additional resource when reviewing your data and determining how to send your data to CloudNine Review.

**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 that **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.

# Upload Data to CloudNine Review

CloudNine Discovery Portal is used to upload data to existing or new projects in CloudNine Review. Native (raw, unprocessed) electronic files or processed data (load file ready) can be loaded into CloudNine Review.

## CloudNine Discovery Portal: Loading Native/Raw Data to CloudNine Review

On the **Welcome to CloudNine Discovery Portal** screen, you will initialize the workflow for loading data to CloudNine Review.

1. Under **Select Data From:** select the first option, **File System (e.g., File Share, Hard Drive, Forensic Image, etc)**.
2. Choose the **CloudNine Review** option from the **Review Data Using:** section.

CloudNine Discovery Portal

### Welcome to CloudNine Discovery Portal

What would you like to do?

**Select Data From:**

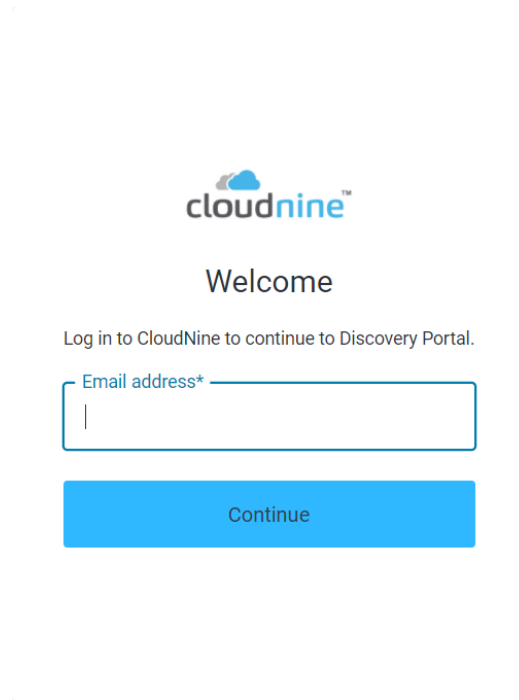
- ☒ File System (e.g., File Share, Hard Drive, Forensic Image, etc)
- ☐ CloudNine Analyst
- ☐ CloudNine LAW
- ☐ CloudNine Explore
- ☐ CloudNine Concordance

**Review Data Using:**

- ☒ CloudNine Review
- ☐ Law Cloud
- ☐ CloudNine Analyst

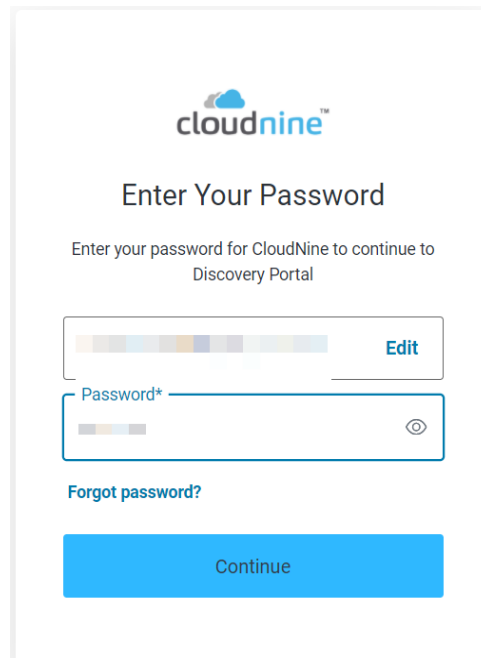
3. Click **Continue**.

4. The **Log in to CloudNine to continue to Discovery Portal** screen appears. Enter your **CloudNine Review Email address**, then click **Continue**.



The screenshot shows the CloudNine login interface. At the top is the CloudNine logo. Below it is the heading "Welcome". Underneath is the instruction "Log in to CloudNine to continue to Discovery Portal." There is a text input field labeled "Email address\*" with a cursor inside. Below the input field is a blue button labeled "Continue".

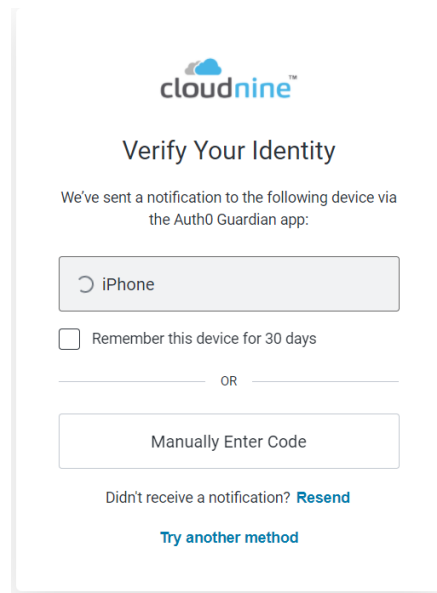
5. Enter your CloudNine Review **Password**, then click **Continue**.



The screenshot shows the CloudNine login interface. At the top is the CloudNine logo. Below it is the heading "Enter Your Password". Underneath is the instruction "Enter your password for CloudNine to continue to Discovery Portal". There is a password input field labeled "Password\*" with a cursor inside. To the right of the input field is an "Edit" button. Below the input field is a blue button labeled "Continue".

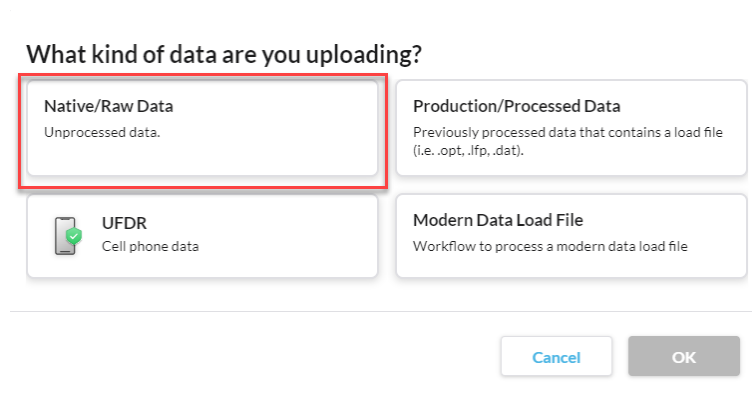


6. The **Verify Your Identity** screen appears, use the **Auth0** method you established with your first log-in to CloudNine Review.



The screenshot shows the 'Verify Your Identity' screen in the CloudNine Review application. At the top is the CloudNine logo. Below it, the title 'Verify Your Identity' is centered. A message states: 'We've sent a notification to the following device via the Auth0 Guardian app:'. Below this is a button labeled 'iPhone' with a circular arrow icon. Underneath is a checkbox labeled 'Remember this device for 30 days'. A horizontal line with 'OR' in the center separates this from a button labeled 'Manually Enter Code'. At the bottom, there is a link 'Didn't receive a notification? Resend' and another link 'Try another method'.

7. Once verified, the popup **What kind of data are you uploading?** appears and has four options to choose from:



The screenshot shows a popup titled 'What kind of data are you uploading?'. It contains four selectable options, each in a rounded rectangle. The first option, 'Native/Raw Data', is highlighted with a red border and includes the subtext 'Unprocessed data.'. The second option is 'Production/Processed Data' with subtext 'Previously processed data that contains a load file (i.e. .opt, .lfp, .dat)'. The third option is 'UFDR' with a green checkmark icon and subtext 'Cell phone data'. The fourth option is 'Modern Data Load File' with subtext 'Workflow to process a modern data load file'. At the bottom right of the popup are two buttons: 'Cancel' and 'OK'.

- **Native/Raw Data:** Data that has not undergone any processing to expand container files, extract metadata, extract native files, or extract text files. This is eDiscovery data in its original collected format.
- **Production/Processed Data:** Data is processed and contains the corresponding .DAT load files for metadata along with links to the native and text files. If images exist, a .LFP or .OPT file is available for image uploads.

- **UFDR:** Cell phone data provided in a UFDR file, a summary report of data collected from a smart phone or other smart devices.
- **Modern Data Load File:** Data collected from cell phones, group messages, social media, etc and provided in a delimited load file format such as a CSV or DAT file.

Select **Native/Raw Data** to upload unprocessed data, then click **OK**.

## Select a CloudNine Review Case

You are now on the **Select a CloudNine Review Case**.

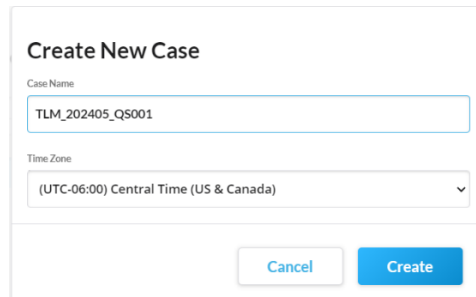
On this screen, you will:

1. Enter an **Upload name** (required),
2. Select an existing CloudNine Review Project from the **Case Name list**, or
3. **Create Case** to upload data to.

**NOTE:** You must have **Admin** rights to a CloudNine Review project to upload data. If an existing project does not appear in the **Case name** list, you do not have **Admin** rights to that project.

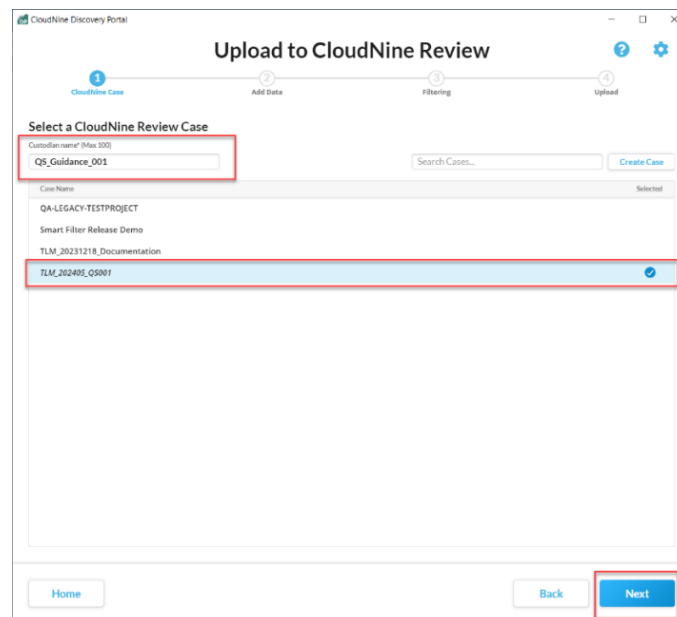
## Create Case

1. Select **Create Case**. The **Create New Case** popup opens.
2. Enter a **Case Name**, then select the **Time Zone** for the case.



The 'Create New Case' popup form contains two input fields. The first is 'Case Name' with the text 'TLM\_202405\_QS001' entered. The second is 'Time Zone' with a dropdown menu showing '(UTC-06:00) Central Time (US & Canada)'. At the bottom are 'Cancel' and 'Create' buttons.

3. Click **Create**. The case appears in the **Case Name** list, italicized, and selected for the import.



The 'Upload to CloudNine Review' screen shows a progress bar with four steps: 1. CloudNine Case, 2. Add Data, 3. Filtering, and 4. Upload. Below the progress bar is a section titled 'Select a CloudNine Review Case'. It includes a search bar with 'Q5\_Guidance\_001' entered and a 'Create Case' button. A list of cases is shown below, with 'TLM\_202405\_QS001' selected and highlighted in blue. At the bottom are 'Home', 'Back', and 'Next' buttons.

4. Enter the **Upload name** for the data.
5. Click **Next** to advance to the **Select Data for Upload** screen.

**NOTE:** If you create a new case, you will be an **Admin** to the CloudNine Review case.

The new case created through CloudNine Discovery Portal is temporary and is not created in CloudNine Review until the upload is completed and data is received by CloudNine Review.

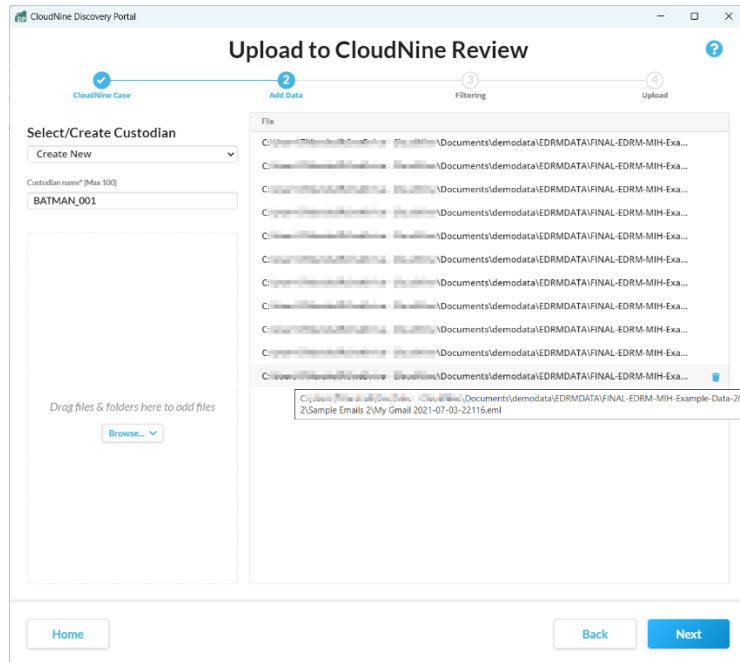
## Select/Create Custodian and Select Data for Upload

On this screen there are two sections: Select/Create Custodian and Select Data for Upload.

The screenshot shows the 'Upload to CloudNine Review' window in the CloudNine Discovery Portal. The interface is divided into two main sections. The left section, 'Select/Create Custodian', features a dropdown menu set to 'Create New' and a text input field for 'Custodian name\*' (Max 100) containing the text 'Batman'. A red circle with the number '1' is placed over this section. The right section, 'Select Data for Upload', contains a large rectangular area for dragging files and folders, with the text 'Drag files & folders here to add files' and a 'Browse...' button. A red circle with the number '2' is placed over this section. At the top, a progress bar indicates the current step is 'Add Data' (step 2 of 4). At the bottom, there are 'Home', 'Back', and 'Next' buttons.

1. **Select/Create Custodian:** Here you will choose the custodian for the data you are loading or select **Create New** from the drop-down then enter the **Custodian name**. Only one custodian can be assigned to the data selected for upload.
2. **Select Data for Upload,** choose the data to upload to the CloudNine Review case. Select folders/files using either of the following options.
  - Drag and Drop any number of files and folders into the area marked **Drag files & folders here to add files**.
  - Select the **Browse...** drop-down and select either **Add files...** or **Add folders...** to navigate and select the files/folders you wish to upload to CloudNine Review. Once selected, choose **Open** (files) or **Select Folder** (folders) in the bottom right corner.

Discovery Portal lists the selected files or files found in the folder selected. You can continue to add files via drag/drop or browse file/folder selection methods until you have selected all files you wish to upload.



3. After selecting the files and folders to upload, click **Next** to advance to the **Pre-Upload Filtering** screen.

## Pre-Upload Filtering

When uploading native files to CloudNine Review, you have the option to inventory and exclude files from the upload process. For example, you may choose to exclude specific file types, or you may choose to filter by date range.

For this document, all selected files will be uploaded. To learn more about the Pre-Upload Inventory and Filter option, review the Knowledge Base articles: [CloudNine Discovery Portal: How do I process/upload native files to CloudNine Review](#), or [Is there a way to identify file types or inventory data before uploading?](#)

CloudNine Discovery Portal

## Upload to CloudNine Review

CloudNine Case Add Data Filtering Upload

### Pre-Upload Filtering

Users have the option to take inventory of data and then cull data prior to processing. All filtering is done in place prior to upload. Options include date range and file type.

**Do you want to cull data prior to processing?**

☐ Yes - the defaulted option is to inventory by file extension

☐ Use Enhanced file type identification - Inventory by the file header. Note this option will increase the inventory time

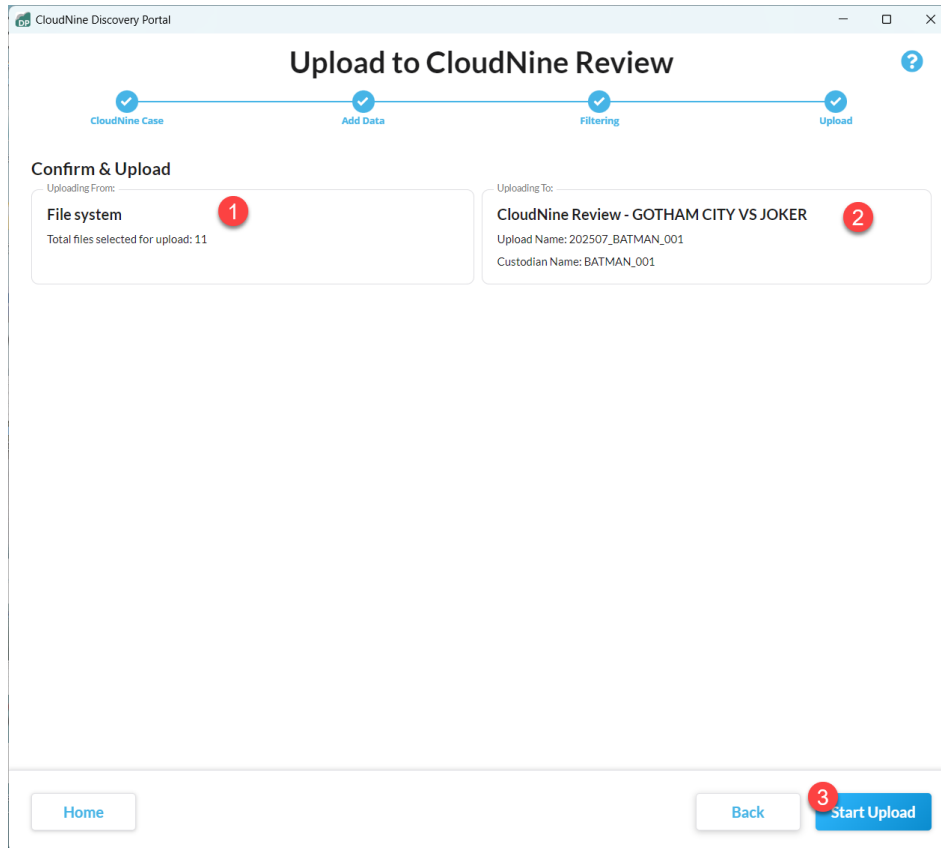
☒ No

Home Back Next

1. Select **No** (default selection) under **Do you want to cull data prior to processing?**
2. Click **Next** to advance to the **Confirm & Upload** screen.

## Confirm & Upload

The **Confirm & Upload** screen is your last chance to verify file counts, the **CloudNine Review Case**, Upload Name, and the **Custodian Name** you are uploading to.



CloudNine Discovery Portal

### Upload to CloudNine Review

CloudNine Case Add Data Filtering Upload

#### Confirm & Upload

Uploading From:

**File system** 1

Total files selected for upload: 11

Uploading To:

**CloudNine Review - GOTHAM CITY VS JOKER** 2

Upload Name: 202507\_BATMAN\_001

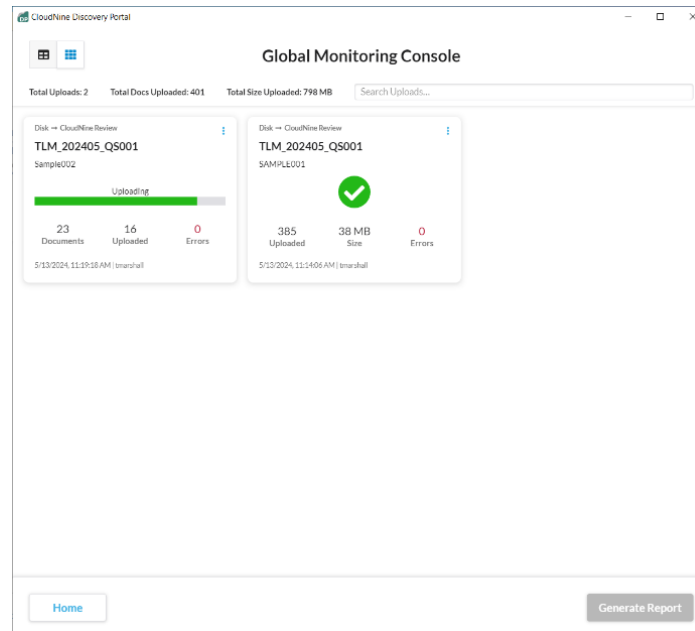
Custodian Name: BATMAN\_001

Home Back Start Upload 3

1. Verify the **File System: Total files selected for upload: <file count>** is the number of files, not expanded, selected for upload.
2. Under **Uploading to:** Confirm the **CloudNine Review - <Case Name>**, **Upload Name**, and **Custodian Name**.
3. Select **Start Upload** to initialize the data upload.

## Global Monitoring Console

CloudNine Discovery Portal compresses the files and then uploads them to CloudNine Servers. The Global Monitoring Console provides status updates for the upload process.



The Complete status indicates the files are uploaded to CloudNine Review servers. Once received, the files are processed to CloudNine Review.

## 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.

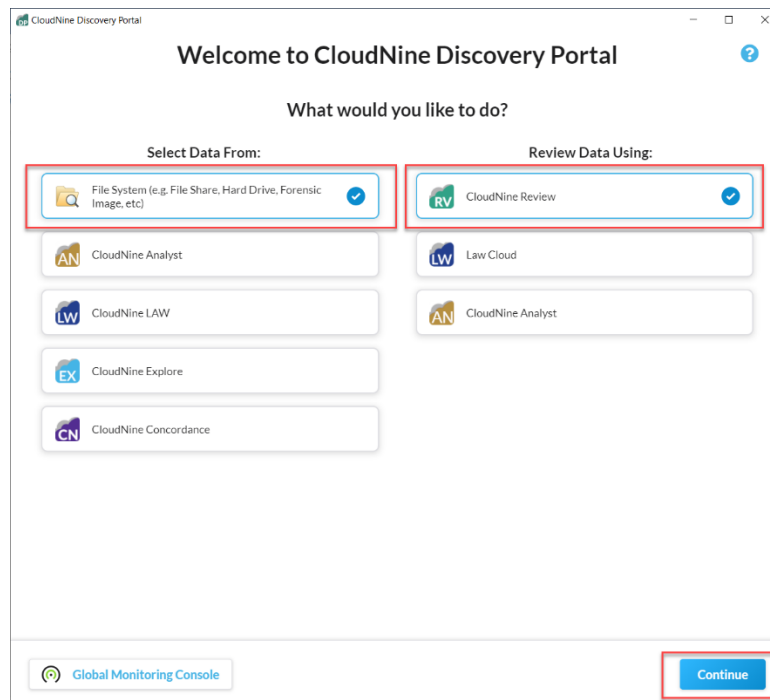
- **Email 3:** (CloudNine Discovery Portal Analytics Complete) arrives after data has been completely indexed and analytics have finished.



## Upload Production / Processed Data

If you have already processed files and data with corresponding load files, use CloudNine Discovery Portal to upload data to CloudNine Review.

1. Launch CloudNine Discovery Portal.




2. On the **Welcome to CloudNine Discovery Portal / What would you like to do?** screen, under **Select Data From:**, choose **File System**.
3. Under **Review Data Using:**, select **CloudNine Review**.
4. Click **Continue**.
5. The Login to CloudNine screen appears; enter your **Email address** and **Password** for CloudNine Review then **Verify Your Identity**.
6. The **What kind of data are you uploading?** screen appears. Select **Production/Processed Data**.

What kind of data are you uploading?

Native/Raw Data  
Unprocessed data.

Production/Processed Data  
Previously processed data that contains a load file (i.e. .opt, .lfp, .dat).

 UFDR  
Cell phone data

Modern Data Load File  
Workflow to process a modern data load file

Cancel OK

7. Click **OK** to advance to the next screen, **Select a CloudNine Review Case**.
8. Enter an **Upload name**; this could be the production or volume name of the data set.
9. Select a CloudNine Review case from the **Case name** list or click **Create Case** to create a new case.

CloudNine Discovery Portal

### Upload to CloudNine Review

1 CloudNine Case 2 Add Data Loading Options 3 Map Fields 4 Upload

Select a CloudNine Review Case

Upload name\* (Max 500)  
GOVDOCS\_PROD001

Search Cases... Create Case

Case Name	Selected
TLM_202405_Q5001	<input checked="" type="checkbox"/>

Home Back Next

10. Click **Next**. You are now on the **Select Processed Data and Supporting Files** screen.

## Select Processed Data and Supporting Files

There are two options for loading your production/processed data to CloudNine Review:

- **Self-Service Loading:** Uses a load file to load data, natives, text, and images into an existing CloudNine Review case or a new case. You can also overlay data to existing records in a CloudNine Review case.

- **CloudNine Client Services:** Sends the data to our Client Services team for loading.

CloudNine Discovery Portal

### Upload to CloudNine Review

1 CloudNine Case 2 Add Data Loading Options 3 Map Fields 4 Upload

#### Select Processed Data and Supporting Files

Select the Native .DAT load file

C:\20200731\_GOVDOCS\_001\20200731\_GOVDOCS\_001.dat Browse... Clear

Select the Image .OPT or .LFP load file

Enter file path... Browse... Clear

☒ Load Data as New Records

☐ Overlay Data onto Existing Records Beg Dates (BegDoc)

#### Self-Service Loading

☐ Bypass manual loading, and send the data to our Client Services team for loading

#### Select Production/Processed Data

Select the root folder that contains the natives, text, image, and load files of the processed data

Processed Data Path

Enter folder path... Browse... Clear

#### CloudNine Client Services

Home Back Next

This section provides instructions for self-service loading new records.

- Under **Select Processed Data and Supporting Files:**
  - Click **Browse...** next to **Select the Native .DAT load file**. Navigate and select the .DAT file you wish to upload; once selected, click **Open**.
  - For Images, **Browse...** to **Select the Image .OPT or .LFP load file**. Select the OPT or LFP file, then click **Open**.
- Choose **Load Data as New Records** (default selection).

CloudNine Discovery Portal

## Upload to CloudNine Review

1 CloudNine Case 2 Add Data Loading Options 3 Map Fields 4 Upload

Select Processed Data and Supporting Files

Select the Native .DAT load file

C:\From\_Law\20230328\_VOL001\20230328\_VOL001.dat [Browse...](#) [Clear](#)

Select the Image .OPT or .JFP load file

C:\From\_Law\20230328\_VOL001\20230328\_VOL001.jpg [Browse...](#) [Clear](#)

☒ Load Data as New Records

☐ Overlay Data onto Existing Records Beg Bates (BegDoc)

3. Click **Next** to advance to the **Field Mapping** screen.

## Field Mapping

Field mapping is a major step when uploading production/processed data to CloudNine Review. You must map fields from the DAT load file to system fields in CloudNine Review. If fields are not mapped, the data in the DAT load file will not be available in CloudNine Review.

CloudNine Discovery Portal

## Upload to CloudNine Review

1 CloudNine Case 2 Add Data Loading Options 3 Map Fields 4 Upload

Search Dat Fields

Dat File Fields [View](#)

Beg Bates

NativeFilePath

Not mapped ✓

TextFilePath

1

1 Field Selected - 1 Not Yet Mapped

Dat File Fields CloudNine Review Fields

Not mapped Beg Bates (BegDoc)

2

CloudNine Fields [View](#)

Application

AttachList

Attachments

AttachRange

Author

BCC

Beg Attached

Beg Bates (BegDoc) ✓

CC

Comments

Conversation Thread ID

Convid

ConvTopic

Created Date

Custodian

Delivered Date

DupCustNames

3

[Auto Map](#)

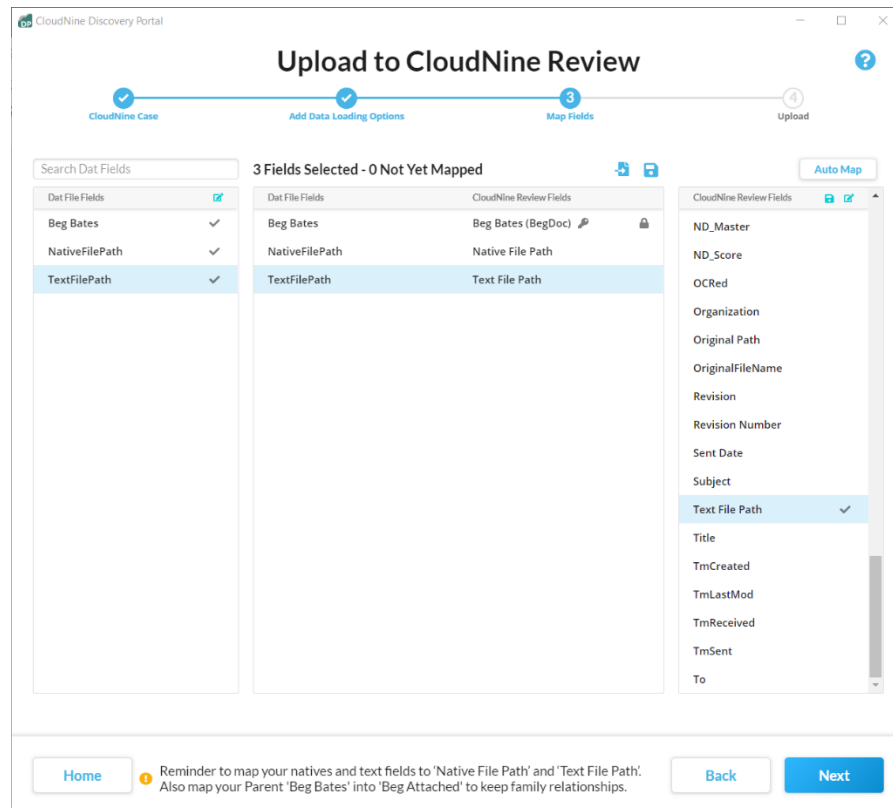
[Home](#) Please make sure to map the Beg Bates (BegDoc) for your key field [Back](#) [Next](#)

There are three sections to Field Mapping:

1. **DAT File Fields:** All fields found in the DAT (data) file are listed here.
2. **Field Mapping:** Displays the DAT Field and Mapped CloudNine Review Field. Not mapped indicates the field is selected from the DAT or CloudNine Review Field but is not mapped.
3. **CloudNine Review Fields:** Lists the fields available in CloudNine Review the data fields can be mapped to.

At a minimum, you will need to map the BegBates (**Key** field that connects data, natives, text, and images). If you have text and native files, you will need to map the native and text file paths. To maintain family relationships, the Parent identifier (Parent BegBates) must be mapped to the BegAttached field.

1. From **DAT File Fields**, choose the “**Beg Bates (BegDoc)**” that is the **key** field.
2. Select additional fields found from the **DAT File Fields**, mapping them to the best corresponding field in CloudNine Review. The example below illustrates three fields in the **DAT Field List** that are mapped to corresponding fields in CloudNine Review.



**Upload to CloudNine Review**

CloudNine Case Add Data Loading Options **3 Map Fields** 4 Upload

Search Dat Fields

Dat File Fields	CloudNine Review Fields
Beg Bates	Beg Bates (BegDoc)
NativeFilePath	Native File Path
TextFilePath	Text File Path

CloudNine Review Fields

- ND\_Master
- ND\_Score
- OCRed
- Organization
- Original Path
- OriginalFileName
- Revision
- Revision Number
- Sent Date
- Subject
- Text File Path**
- Title
- TmCreated
- TmLastMod
- TmReceived
- TmSent
- To

Home Reminder to map your natives and text fields to 'Native File Path' and 'Text File Path'. Also map your Parent 'Beg Bates' into 'Beg Attached' to keep family relationships. Back Next

3. After mapping fields from the DAT file to fields in CloudNine Review, click **Next** to advance to the **Confirm & Upload** screen.

For more in-depth information on Field Mapping, refer to the Knowledge Base article: [CloudNine Discovery Portal – CloudNine Review: How do I upload processed data \(with load files\) to CloudNine Review.](#)

## Confirm & Upload

The **Confirm & Upload** screen is your last chance to review the data you have selected for upload. When uploading already processed data into CloudNine Review, the CloudNine Discovery Portal provides information about the data upload.

CloudNine Discovery Portal

### Upload to CloudNine Review

CloudNine Case Add Data Loading Options Map Fields Upload

#### Confirm & Upload

Uploading From:

**Processed Data**

.DAT File: 20230328\_VOL001.dat  
Image Load File: 20230328\_VOL001.lfp  
Upload Name: VOL001  
Number of Records Identified in the .DAT: 404  
Number of Mapped Fields: 3  
Number of Native Documents Identified in the Load File: 404  
Number of Text Documents Identified in the Load File: 372  
Number of Image Documents Identified in the Load File: 404  
Number of Image Pages Identified in the Load File: 1656  
Number of Fields Being Created in CloudNine Review: 0

Uploading To:

**CloudNine Review - TLM\_202405\_QS001**

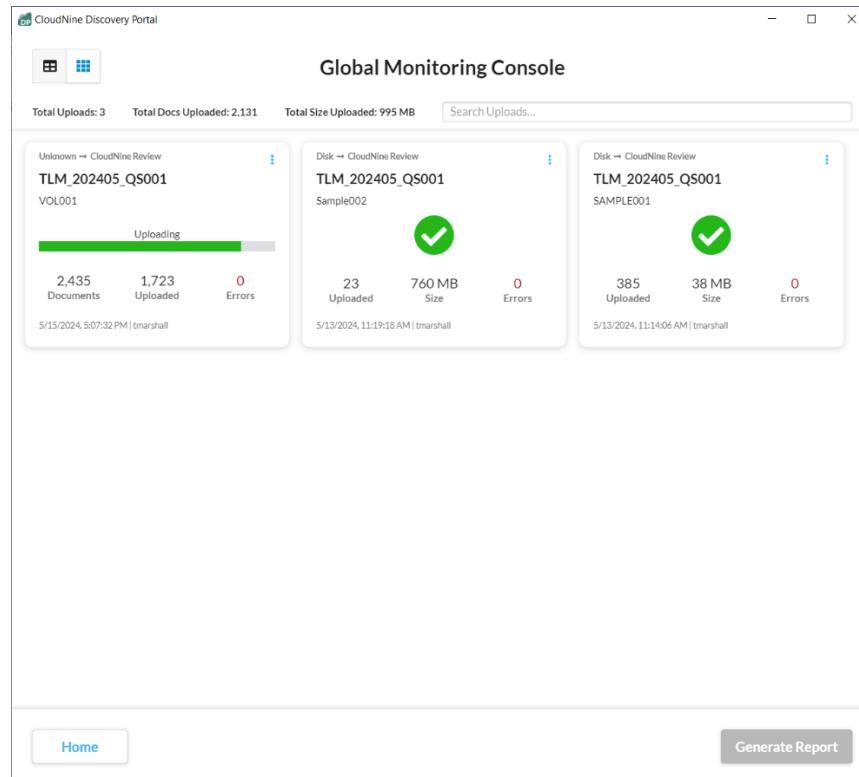
Action: Create new  
.DAT Field Delimiters: Comma/Column: T (020); Quote: p (254); Newline: S (174)  
.DAT File Encoding: ANSI  
.DAT Date Field Format: MM/DD/YYYY

Home Back Start Upload

1. Review the information in the **Uploading From / Processed Data**. Verify the Load Files, Upload Name, Number of Records, Number of Mapped Fields, Number of Native Files, Number of Text Files, and Number of Image files match with the processed data counts.
2. For **Uploading To**, verify the CloudNine Review project you are importing to, Action, and .DAT information.
3. Click **Back** to make any necessary changes. If you are satisfied with the information, click **Start Upload**.

# Global Monitoring Console

The **Global Monitoring Console** appears and shows the status of the upload process.



When the upload is complete, a status with a green check mark appears. This means the upload has been received by CloudNine Servers.

You will receive email notifications about the progress of the import into CloudNine Review.

## Resources

Answer Center: [https://answercenter.ediscovery.co/litigation/ac/ac\\_portal/index.html?welcome.htm](https://answercenter.ediscovery.co/litigation/ac/ac_portal/index.html?welcome.htm)

CloudNine Discovery Portal: <https://kb.cloudnine.com/cloudnine-discovery-portal>

CloudNine Review: <https://kb.cloudnine.com/cloudnine-review>

CloudNine Support Team: Email [support@cloudnine.com](mailto:support@cloudnine.com) or phone 713-462-6464.