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# QUICK START GUIDE

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CloudNine Discovery Portal

LAW to Relativity Bridge

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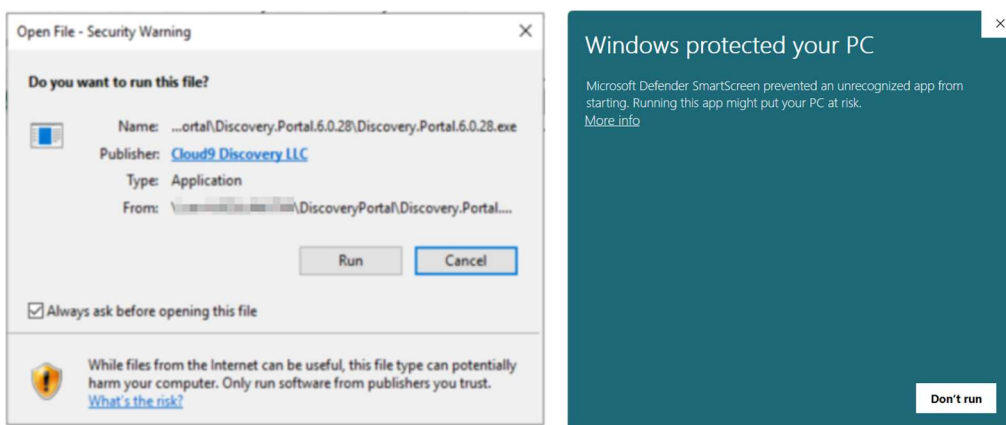
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# Overview

The CloudNine LAW to Relativity bridge is an add-on license for CloudNine Discovery Portal that allows you to transfer data processed in CloudNine LAW to Relativity without exporting from LAW and importing into Relativity. Similarly, data can be transferred from Relativity to CloudNine LAW.

## Installation

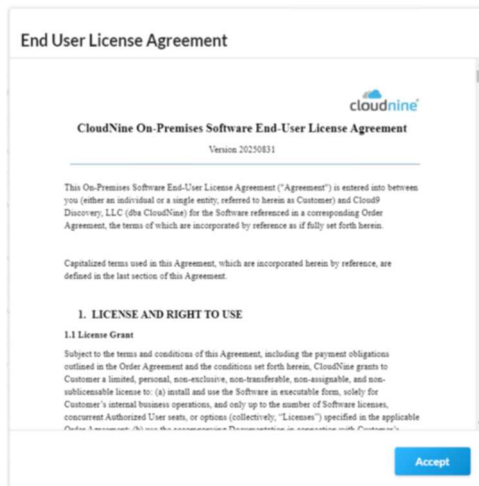
1. Download the DiscoveryPortal.zip file from the link provided.
2. Once downloaded, unzip the files.
3. Double-click the **Discovery.Portal.<version>.exe** to launch the installer.
4. Review any security warning received, the warning should be a result of the installer not being signed. Select **Run** to proceed, or **More info – Run anyway**.



5. CloudNine Discovery Portal initializes and begins updating...

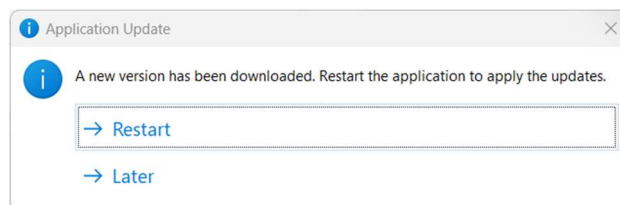


6. Once the installation is completed, CloudNine Discovery Portal launches with the End User License Agreement displayed. Read the EULA, then **Accept** to close the EULA.



CloudNine Discovery Portal is installed, and you are on the Welcome (home) screen, the next step is to establish the settings necessary for the CloudNine LAW to Relativity connections.

**Note:** CloudNine Discovery Portal is self-updating, when you open the application, it will check the version and update to the current version. Once updated, an Application Update message appears. Click **Restart** to apply the updates.



## Configuring the Bridge – CloudNine LAW to Relativity Connection

In this section you will configure the settings necessary to establish the connection between CloudNine LAW and Relativity. Requirements to the connection are:

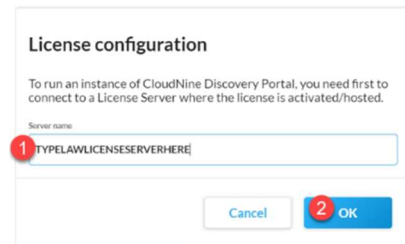
- CloudNine LAW's License Server.
- Add on **Discovery Portal Connector R** license.
- **CloudNine LAW connection information:** SQL Server, SQL Database Name, Username and Password.
- **Relativity Connection information:** Relativity URL, Relativity Login, and Relativity Password.



## License Configuration

The first window is the License configuration.

1. Beneath **Server name**, enter the host server that houses your **CloudNine LAW License Server**. The License Server entered must have the **Discovery Portal Connector R** license.
2. Click **OK**.

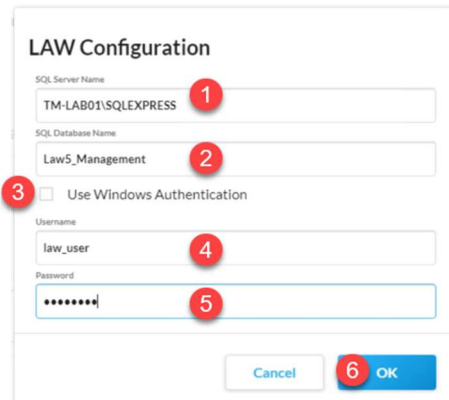


The 'License configuration' dialog box contains a text field for 'Server name' with the placeholder text 'TYPE LAW LICENSE SERVER HERE'. Below the field are 'Cancel' and 'OK' buttons. Red numbered callouts 1 and 2 point to the text field and the 'OK' button respectively.

## LAW Configuration

Next is LAW Configuration. In this window you will:

1. Enter the **SQL Server Name** used for CloudNine LAW.
2. Enter the **SQL Database Name** that stores LAW Case information; the default database created by LAW is **LAW5\_Management**.
3. Select **Use Windows Authentication** if SQL is configured for Windows Authentication.
4. Enter the **Username** used to connect to SQL.
5. Enter the **Password**.
6. Click **OK**.



The 'LAW Configuration' dialog box has several fields: 'SQL Server Name' (1) with 'TM-LAB01\SQLEXPRESS', 'SQL Database Name' (2) with 'Law5\_Management', a checkbox for 'Use Windows Authentication' (3), 'Username' (4) with 'law\_user', and 'Password' (5) with masked characters. 'Cancel' and 'OK' (6) buttons are at the bottom. Red numbered callouts 1 through 6 highlight each field and the final button.

## Connect to Relativity

Finally, you will enter information to connect to Relativity.

1. Enter the **Relativity URL** you wish to connect to.
2. Type in your **Relativity Login**.
3. Enter your **Relativity Password**.
4. Click **OK**.



The 'Connect to Relativity' dialog box contains three fields: 'Relativity URL' (1) with 'http://', 'Relativity Login' (2) with 'Test@cloudnine.com', and 'Relativity Password' (3) with masked characters. 'Cancel' and 'OK' (4) buttons are at the bottom. Red numbered callouts 1 through 4 highlight each field and the final button.

# CloudNine LAW – Relativity: Transferring Data

CloudNine Discovery Portal is installed, and the connection between LAW and Relativity is set. You are now ready to push data from CloudNine LAW to Relativity. A Tag field is used to identify the records in the LAW database that will be sent to Relativity.

## Before you Begin: Preparing the CloudNine LAW Database

In addition to your normal workflow processing in LAW, you will need the following

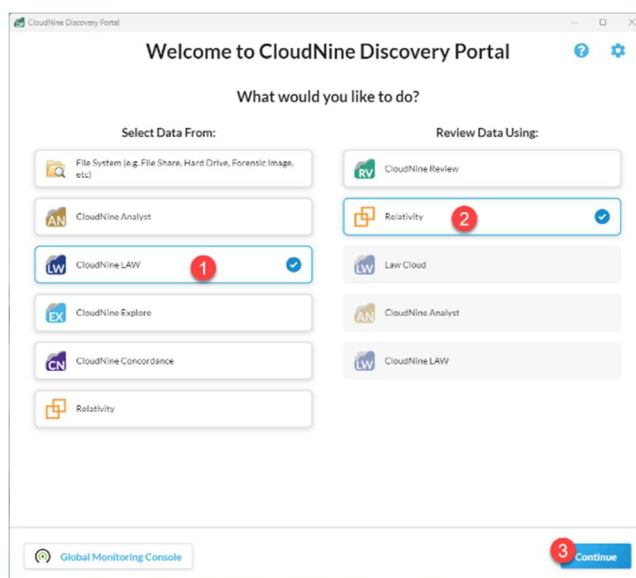
- Create a document-level Tag Field (Index-Modify Fields).
- Isolate and tag the document records that will be pushed to Relativity.
- Assign unique numbering (document-level or page-level) on records being pushed to Relativity.
  - Batch Process – Numbering.
  - Batch Update (can increment document-level Text Field such as Control Number, DocID2, etc).
- Update user-created fields to maintain attachment information (BegAttach2, EndAttach2, AttachNo, Record Type). The attachment and record type fields are populated during the export process. Since you are not exporting, you may wish to populate fields to maintain the relationship.

To view / update attachment fields:

  - Search Results grid view – select **View-Attachment Fields**. The fields are populated based on the BegDoc# field. Copy/Paste attachment information into the user-created fields.
  - Run the Expanded Populate Record Types script to populate user created beg/end attachment fields. Download the script [here](#).

## Step 1: Select CloudNine LAW to Relativity Workflow

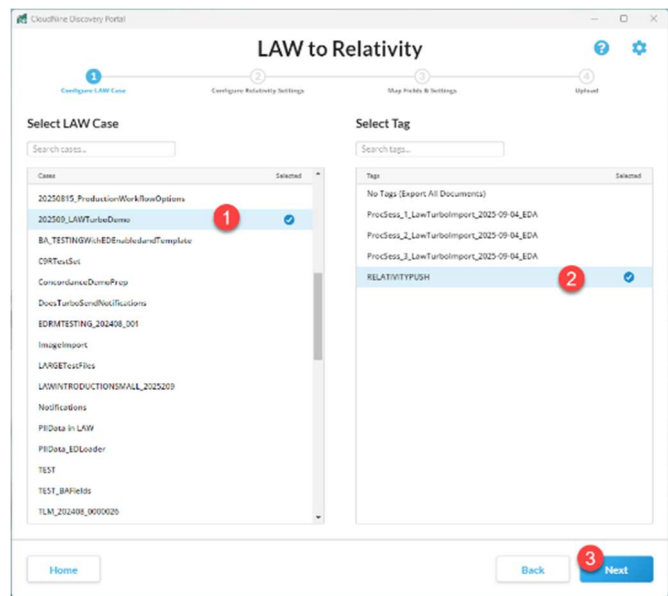
1. On the Welcome to CloudNine Discovery Portal screen, **Select Data From:** choose **CloudNine LAW**.
2. Under **Review Data Using:** select **Relativity**.
3. Click **Continue** to proceed to the next screen.



## Step 2: Configure LAW Case

On this screen you will select the LAW case and Tag field used to identify the records that will be pushed to Relativity.

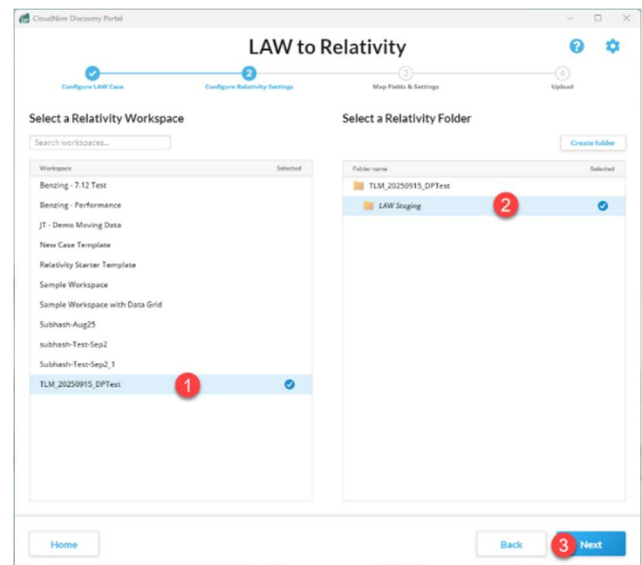
1. Under **Select LAW Case**, use **Search cases...** or the scroll option to locate and select the LAW case you wish to transfer your data from. Once the case is selected, any Tag field in the selected LAW case is displayed under the **Select Tag** column.
2. From the **Tag** list, select the Tag used to identify the records that will be sent to Relativity. The **No Tags (Export All Documents)** option is available if you do not have any tag fields in the database or if you wish to export all document records to the Relativity project.
3. Click **Next** to advance to the Configure Relativity Settings.



## Step 3: Configure Relativity Settings

Next, you will select the Relativity Workspace and Relativity Folder where the records will be uploaded.

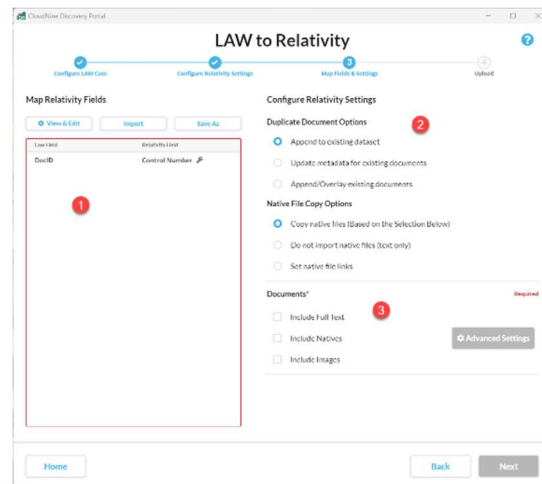
1. Select the **Relativity Workspace** from the **Workspace** list.
2. Choose an existing **Relativity Folder** or the **Create folder** option to create a new Relativity folder to load the data to.
  - a. The **Create folder** option becomes available when the top folder is selected. Once created, you may need to double-click the root folder to expand and see the created folder. A folder created in Discovery Portal is temporary until the data is received and loaded into Relativity. Once loaded, the folder appears in your Relativity workspace.
3. Click **Next** to advance to the Map Fields and Settings.



## Step 4: Map Fields and Configure Settings

You are now on Map Fields and Settings. On this screen, you will:

1. Map Relativity Fields.
2. Configure Relativity Settings and select Document types.



### Map Relativity Fields

Field mapping is essential when pushing data between CloudNine LAW and Relativity. When you map fields, you are instructing CloudNine Discovery Portal to pull data from the specified LAW fields and push the same data to the specified field in Relativity. There are three options when mapping fields.

- **View & Edit:** Opens the View/Edit Field Mapping window to map LAW fields to Relativity fields. After your initial setup, you can save the mapped fields as a template to use with future uploads.
- **Import:** Import a saved Field Mapping Template.
- **Save As:** Saves a Field Mapping Template to use when pushing data to Relativity.

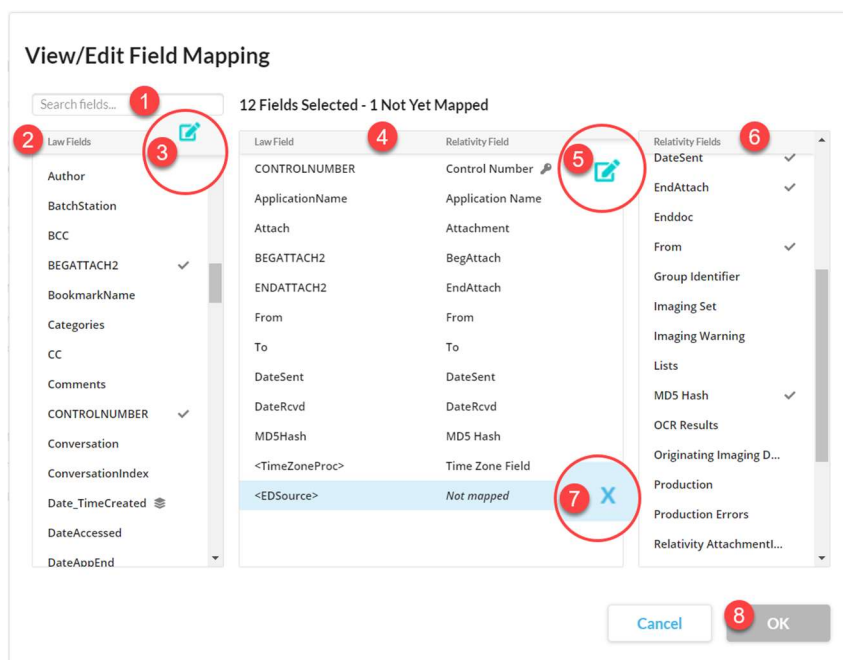
**Note:** Accelerate your workflow by creating and leveraging Field Mapping Templates that standardize project scope, processes, and procedures.

#### View & Edit

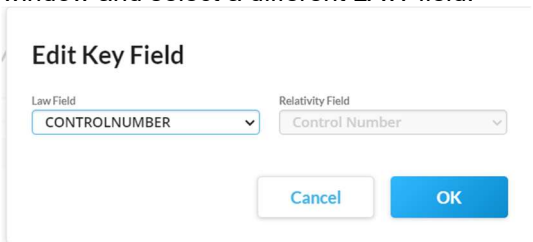
Click the **View & Edit** button to open the **View/Edit Field Mapping** window. Here, you will map LAW fields to Relativity fields.

The **Key** field is required and is a unique identifier for each record in the database. The key field is often referred to as the Control Number, Document ID, Image Tag, Key, Media ID, etc. This field is used to connect database records and data to document files (Native, Text, Images). The field is also the common denominator between LAW and Relativity, making it possible to push data and files between the applications.

## Navigating the View/Edit Field Mapping



	Option	Description
1	Search fields...	Dynamic search to locate the LAW and Relativity Fields, as you type in the <b>Search fields...</b> area, results are returned in both the LAW Fields and Relativity Fields columns.
2	LAW Fields	Lists all (@)custom, (_, (<>))system, metadata, and user-created fields available in the LAW database.
3	LAW Fields editor	<p>Select to create custom fields by merging two or more existing fields into a single field. There are some custom fields already available that combine the date and time fields. These fields contain an @ before the field name.</p> <p>Click the LAW fields option to open the <b>Manage LAW custom fields</b> window. (see Manage LAW Custom Fields).</p>
4	Fields Selected - Mapped	Shows the number of LAW Fields Selected, and the number Not Yet Mapped. A list displays the selected LAW Fields alongside their corresponding mapped Relativity Fields.
5	Edit Key Field	The <b>Key</b> field is the common record identifier between LAW and Relativity. In LAW, this can be any unique identifier (DocID, DocID2, Control Number, <BegDoc>, etc.). In Relativity, the Key field is Control Number. By default, Discovery Portal will select the LAW DocID field to map to the Control Number.

		<p>To use a different LAW field, click to open the <b>Edit Key Field</b> window and select a different LAW field.</p> 
6	Relativity Fields	Fields available in the Relativity workspace. The fields must exist in Relativity to be available for mapping. A check mark appears next to a selected field.
7	Delete	Removes a selected field from the list. Click to highlight the field selected/mapped. Once highlighted, the delete (X) option appears.
8	OK	<p>Closes and saves the Selected and Mapped Fields.</p> <p><b>Note:</b> If this option is grayed out, the Key field is not selected, or you have selected fields that are not mapped.</p>

## Field Mapping

1. From the LAW fields column, select a Field. The Field appears under Fields Select – Not Yet Mapped and is highlighted.
2. In the Relativity Fields column, select the Field you wish to map to.
3. Repeat until you have selected and mapped all desired fields.
4. Click OK to close the View/Edit Field Mapping.

## Custom LAW Fields

The Custom LAW fields option allows you to combine the data from two or more LAW fields into one custom field. For example, you can create a custom field that combines the Custodian and <EDFolder> data.

### Create new field

1. Click the **LAW fields editor** option to open the **Manage LAW custom fields**.
2. Select **Create new field**, then **Continue**.
3. In **Manage LAW custom fields**, enter a **Field name**, then select two or more fields in the order you wish the field data to be merged.
4. Select **Use parent value for all documents in a family** to update attachment records with the same value.
5. Click **Save** to save to the LAW Fields column on the Field Selecting/Mapping screen.

6. A **Confirm & Save** window opens. Verify, then click **OK**.

## Edit existing field

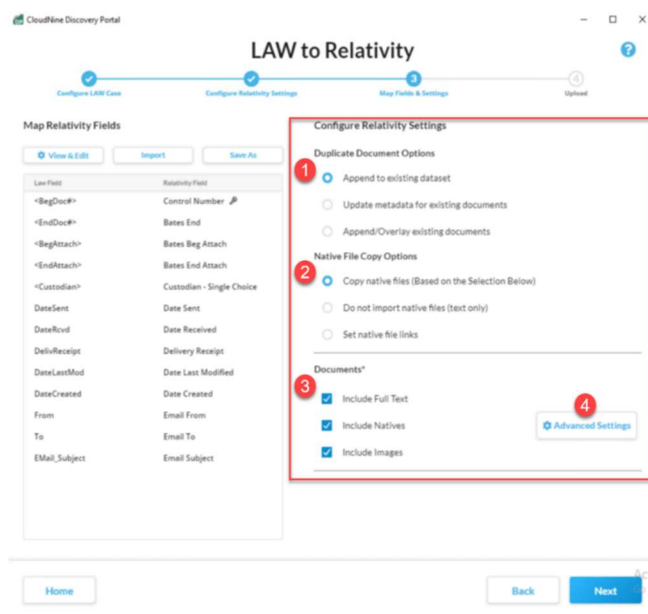
The Edit existing fields is available if you have created Custom fields in CloudNine Discovery Portal.

1. Select the **Edit existing field** option,
2. From the custom field list, choose the field that needs to be edited.
3. The **Manage LAW custom fields** window opens, make changes to the field, then click **Save**.
4. On the **Confirm & Save window**, review the changes, then click **OK** to return to **View/Edit Field Mapping**.

On **Map Fields & Settings**, selected and mapped fields now appear under the **Map Relativity Fields** section.

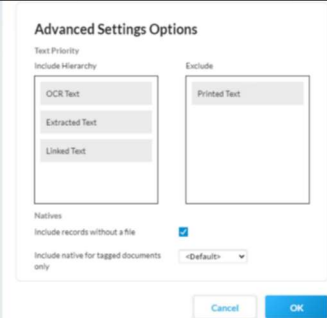
## Configure Relativity Settings

The Configure Relativity Settings determines how duplicate records, native files, and document types are pushed from CloudNine LAW to Relativity.



The table below outlines the available configuration settings to help you select the most appropriate options based on your project's requirements.

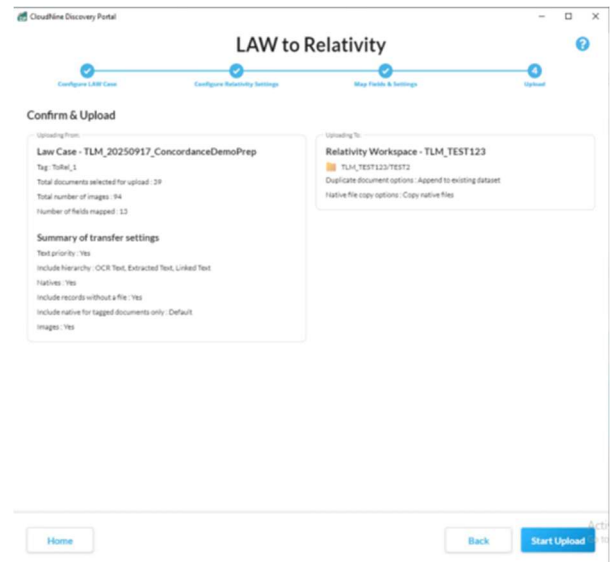
	Setting	Description
1	<b>Duplicate Document Options</b>	Determines how records with duplicate key values are sent to Relativity.
	Append to existing dataset	Adds new Document Records only. Any <b>existing</b> records are <b>ignored</b> . CloudNine Discovery Portal will report skipped files as an error, logging them in the JobSummary log.
	Update metadata for existing documents	<b>Only</b> existing records are updated with metadata information. Any <b>new</b> document records are <b>ignored</b> , not imported, and logged in the JobSummary.log file.
	Append/Overlay existing documents	New document records are added to the Relativity workspace. Overlays data for existing records.
2	<b>Native File Copy Options</b>	How the Native file is copied to Relativity.
	Copy native files (Based on Selection Below)	Native files are copied to the Relativity workspace. Users can open and view documents in Relativity.

	Do not import files (text only)	Native source files are not copied or accessible in the Relativity workspace. The text files are copied and available in the Extracted text field for searching.
	Set native file links	The native source file is not copied into Relativity, but the NativeFilePath field is populated with the path to the native file stored in the LAW directory.
<b>3</b>	<b>Documents</b>	Select the Document Type(s) you wish to send to Relativity. Advanced Settings provides additional settings for text and native files.
	Include Full Text	Sends text files to Relativity. Select <b>Advanced Settings</b> to choose the Text priority and/or exclusions.
	Include Natives	Select to send Native files to Relativity. Choose Advanced Settings for additional native file options.
	Include Images	Select to send Image files to Relativity.
<b>3A</b>	<b>Advanced Settings Options</b>	
	Text Priority	Choose the order of the text state that will be sent. Four types of text may exist: OCR, Extracted, Printed, and Linked. You can drag/drop to change the priority order or drag to the Exclude column to exclude that text type altogether.
	Natives	Advanced Setting options specific to how you include native files.
	Included Records Without a Native (Default)	Enabled by default, this setting will include records that do not have a native file.
	Include native for tagged documents only	This option will push natives for tagged document records only.

After mapping the **LAW fields** to the corresponding **Relativity fields** and configuring the necessary **Relativity** settings, click **Next** to proceed to the **Confirm & Upload** screen.

## Step 5: Confirm & Upload

This screen provides a summary of the data you are sending to Relativity. This is the final review before you begin the upload into Relativity. If changes are needed, select **Back** to return to any previous screens. Once you are confident with your selections, click **Start Upload** to begin the data push to Relativity.

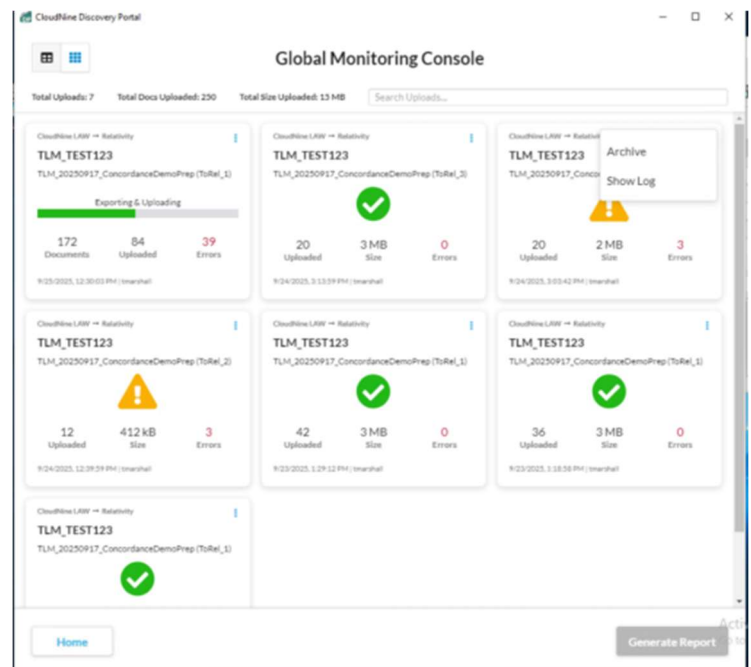


## Global Monitoring Console

The Global Monitoring Console provides real-time visibility into the data transfer process. Upon completion, the status will display as Completed, Completed with warnings, or Error. When the transfer is successful, the documents will appear in the designated Relativity workspace.

All errors and status updates are recorded and accessible in the Log. To view these, click the vertical ellipsis in the upper right corner of the menu, where you will find two options:

- **Archive:** Removes the selected upload from the console.
- **Show Log:** Opens the detailed log file for the upload, including additional information and any identified errors.



For further details on using the Global Monitoring Console, refer to the Knowledge Base [here](#).