

CLOUD CONNECTOR: DATA TRANSFER TO CLOUDNINE REVIEW

Transfer Microsoft 365 and Microsoft Purview Data to CloudNine Review

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About CloudNine's Cloud Connector

CloudNine's Cloud Connector automates the extraction and upload of Microsoft 365 and Microsoft Purview data directly into CloudNine Review. By eliminating PST creation and manual downloads, it streamlines transfer while improving speed and security. This guide is intended for users who have already configured the required Microsoft Entra ID app registration and CloudNine Review connector.

Prerequisites

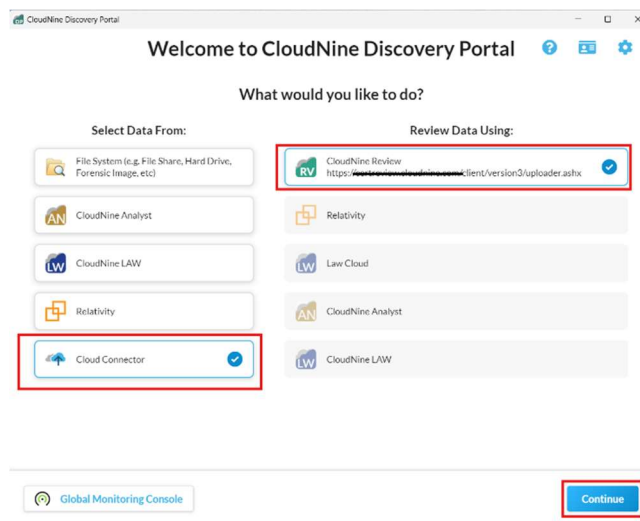
- A registered application in Microsoft Entra ID with Microsoft Graph API permissions
- A connector configured in CloudNine Review
- CloudNine Discovery Portal downloaded and installed locally
 - Download CloudNine Discovery Portal from <https://install.ediscovery.co/>

CloudNine Discovery Portal

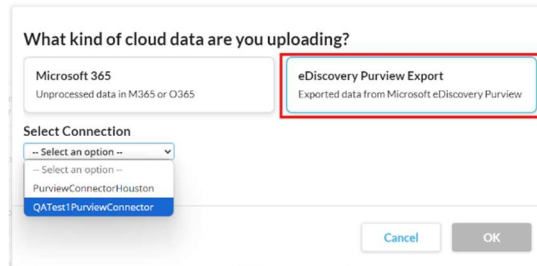
CloudNine Discovery Portal connects Cloud Connector and CloudNine Review and provides the configuration needed for data transfer. This guide walks you through connecting Microsoft 365 or Microsoft Purview and transferring data into a CloudNine Review case.

Step 1: Welcome to CloudNine Discovery Portal

When you open CloudNine Discovery Portal, the **Welcome to CloudNine Discovery Portal** screen appears. Use this screen to select the source and destination for your data transfer before signing in and choosing the appropriate connector.

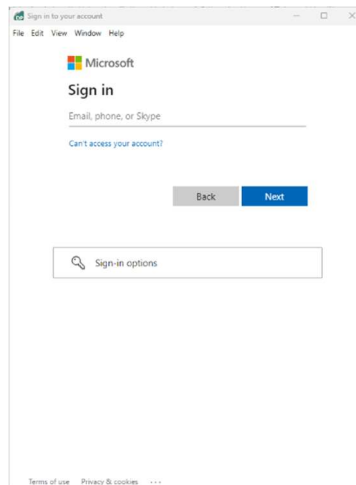


1. Under **Select Data From**, select **Cloud Connector**.
2. Under **Review Data Using**, confirm that **CloudNine Review** is selected.
3. Select **Continue**.
4. Enter your CloudNine Review email address and password, then complete two-factor authentication if prompted.
5. When prompted to choose the cloud data type, select **Microsoft 365** or **eDiscovery Purview Export**.
6. Under **Select Connection**, choose the connector that matches the selected data type, then select **OK**.



Note: Connectors are configured in CloudNine Review. Before you begin, make sure at least one connector is available for each supported data type you plan to use, including Microsoft 365 and Microsoft Purview eDiscovery export. You can configure multiple connectors for the same data type to support administrative or access-control requirements.

7. Sign in to Microsoft using the account associated with the **registered app** configured in **Microsoft Entra ID** for this third-party connection.



Step 2: Cloud Connector to Review – CloudNine Case

After you sign in and select the appropriate cloud data type and connector, the **Cloud Connector to Review**: **Select a CloudNine Review Case** screen appears. On this screen, you name the upload and choose the CloudNine Review case that will receive the data.

The screenshot shows the 'Cloud Connector to Review' interface. At the top, there is a progress bar with three steps: 1. CloudNine Case, 2. Configure Connector, and 3. Upload. The current step is 'Select a CloudNine Review Case'. Below the progress bar, there is a form with the following elements:

- Upload name* (Max 100):** A text input field containing 'DATA REQUEST_ID11111'.
- Search Cases...:** A search input field.
- Create Case:** A button to create a new case.
- Case Name:** A list of cases. The first case, 'Documentation_M365_202604_001', is highlighted in blue and has a 'Selected' status with a checkmark icon. The second case, 'TLM_20260414_TEST001', is listed below it.
- Navigation:** At the bottom, there are three buttons: 'Home', 'Back', and 'Next'. The 'Next' button is highlighted with a red box.

1. In **Upload name**, enter a descriptive name for the transfer.
2. From the **Case Name** list, select the existing CloudNine Review case that should receive the uploaded data.
 - a. If you need to create a new case, select **Create Case**, enter the **Case Name**, choose the appropriate **Time Zone**, and then select **Create**.
 - b. The new case appears in italics in the **Case Name** list and is selected by default. It is created in CloudNine Review after the upload completes.
3. Select **Next** to continue.

Step 3: Cloud Connector to Review – Configure Connector

On the **Configure Connector** screen, select the data you want to collect and define the settings for the transfer. The options on this screen depend on the cloud data type you selected in Step 1. Follow the instructions for the applicable workflow below.

Microsoft 365

The following configuration options are available when using data from Microsoft 365.

CloudNine Discovery Portal

Cloud Connector to Review

CloudNine Case | Configure Connector | Upload

Select/Create Custodian

1 Name(Exc>Last Name,First Name)
 Custodian ID(Exc:email@xyz.com)

Collection Options

2 Collect Calendar Items
 Collect Email
 Collect One Drive

Filter by Date

3 no date is selected, all will be included

Start Date: mm/dd/yyyy
End Date: mm/dd/yyyy

*Date Range Filter applies only to Emails and Calendar Items, and not OneDrive Collection

Password List

4 Enter Password File
Browse...

Select the accounts 5

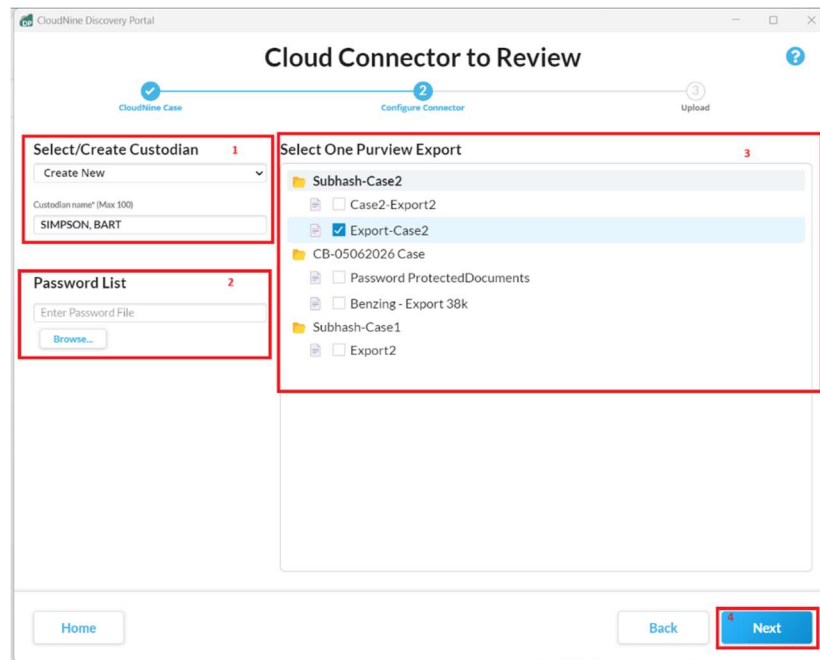
FirstName	LastName	Custodian ID
<input type="checkbox"/>		@ondemandreview.com
<input type="checkbox"/>		@cloudnine.com
<input checked="" type="checkbox"/>	DevOps	devops@ondemandreview.com
<input checked="" type="checkbox"/>	Quality Assurance	DMARC@ondemandreview.com
<input checked="" type="checkbox"/>	QA	QA@ondemandreview.com
<input type="checkbox"/>		@ondemandreview.com
<input type="checkbox"/>	Tech Support	support@ondemandreview.com

Home | Back | 6 Next

1. Under **Select/Create Custodian**, choose whether CloudNine Review should populate the custodian field by **Name** or **Custodian ID**.
2. Under **Collection Options**, select the data types to upload, such as calendar items, email, and OneDrive content.
3. If needed, use **Filter by Date** to enter a start and end date for email and calendar items.
4. If applicable, use **Password List** to browse to a text file containing known passwords for the selected accounts, with one password per line.
5. Under **Select the accounts**, choose the Microsoft 365 accounts you want to collect and upload.
6. Select **Next** to review the upload settings.

Microsoft Purview eDiscovery export

The following settings are specific to exported data from Microsoft Purview.



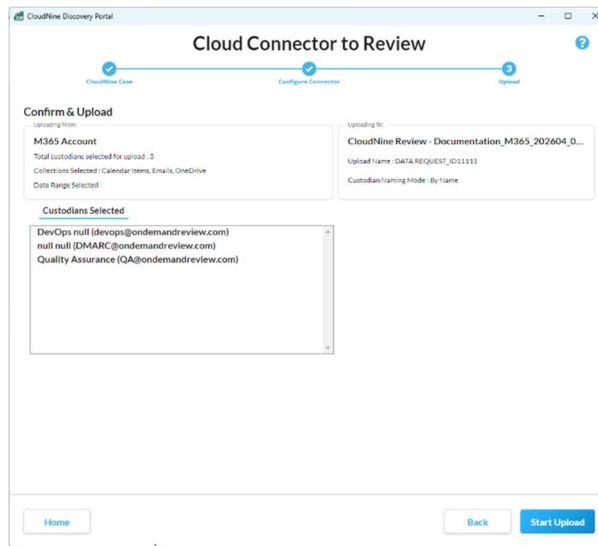
1. Under **Select/Create Custodian**, choose an existing custodian or select **Create New** and enter a custodian name.
2. Under **Password List**, select **Browse** to choose a text file containing known passwords for the imported data, with one password on each line.
3. Under **Select One Purview Export**, review the available Microsoft Purview exports, then select the export you want to import into CloudNine Review.
4. Select **Next** to continue to the **Confirm & Upload** screen.

Step 4: Cloud Connector to Review – Upload

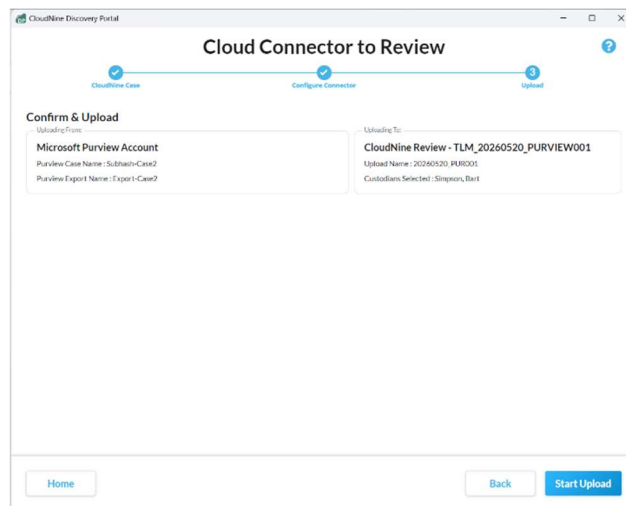
On the **Confirm & Upload** screen, review the selected data source, transfer settings, and destination case before starting the upload. If you need to make changes, select **Back** to return to the previous screen. When you are ready to begin the transfer, select **Start Upload**.

The **Confirm & Upload** screen varies depending on the selected data source. For Microsoft 365, the screen also displays the selected custodians.

Microsoft 365



Microsoft Purview eDiscovery export



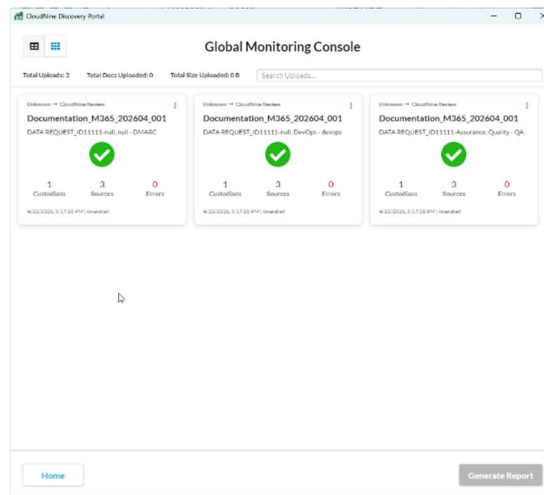
Monitoring the Upload Progress

After the upload begins, you can track progress in CloudNine Discovery Portal and CloudNine Review.

Global Monitoring Console

In CloudNine Discovery Portal, the **Global Monitoring Console** displays status after the connection to Microsoft 365 or Microsoft Purview is established. For Microsoft 365 uploads, each selected

account appears as a separate card in Card View. For Microsoft Purview uploads, only one export can be selected, so only one card appears. A green checkmark indicates that the connection is established and the data transfer to CloudNine Review is in progress.



CloudNine Review – Discovery Queue

After the transfer starts, sign in to CloudNine Review to monitor progress through **Org Discovery Queue** or **My Discovery Queue**.

To open a Discovery Queue:

1. On the **My Projects** page, open the **Training & Support** menu.
 - a. **My Discovery Queue:** Monitor uploads and processes that you initiated.
 - b. **Org Discovery Queue:** If you are a CloudNine Review global admin, monitor uploads and other processes across all projects.

Upload Name	Project	Engine	Workflow	User	Age	Status	Reverts
202602_PUR001	TLM_20260206_PURVIEW001	Explore		QATest@cloudnine.com	14 mins	Initializing, 0% Complete	-
Load01-Assurance, Quality -QA	CB-05120206 365 Connect	Explore		QATest@cloudnine.com	9 days 0 hour	Finished	-
Load	CB-05120206 AdminCaseRights	Explore	New Project	QATest@cloudnine.com	9 days 1 hour	Finished	-
PurviewCase	CB-05120206 PurviewRights	Explore		QATest@cloudnine.com	9 days 1 hour	Finished	-
Load	CB-05072026 PIIProtectPurview	Explore		QATest@cloudnine.com	13 days 4 hours	Finished	-
Load01	CB-05062026 LargePurviewLoad	Explore		QATest@cloudnine.com	13 days 23 hours	Finished	-
Load01	CB-05052026 PurviewTesting	Explore		QATest@cloudnine.com	15 days 4 hours	Finished	-
upload1	Testing Purview	Explore		QATest@cloudnine.com	19 days 0 hour	Finished	-
upload	Testing Purview	Explore		QATest@cloudnine.com	19 days 1 hour	Finished	-
Load01-Assurance, Quality -QA	CB-04302026 M365Check	Explore		QATest@cloudnine.com	20 days 0 hour	Finished	-

You can begin reviewing data in CloudNine Review as soon as one of the selected accounts shows **Finished** in the **Status** column.