



CLOUD CONNECTOR – CLOUDNINE REVIEW

Send Microsoft 365 Data to CloudNine Review

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About CloudNine's Cloud Connector

CloudNine Cloud Connector automates the extraction and upload of Microsoft 365 data directly into CloudNine Review. By eliminating the need for PST generation and manual downloads, it ensures a faster, more secure data transfer process.

Prerequisites

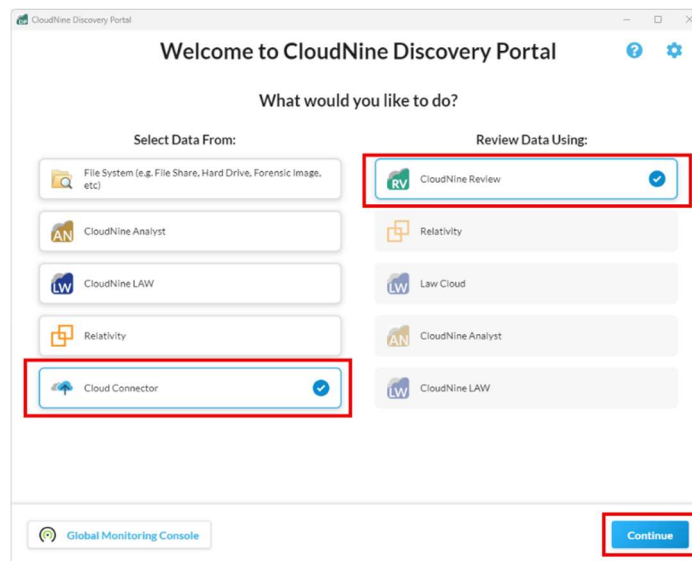
- Registered Application in Microsoft Entra ID with Microsoft Graph API permissions.
- Connector established in CloudNine Review.
- CloudNine Discovery Portal downloaded and installed locally.
 - <https://install.ediscovery.co/>.

CloudNine Discovery Portal

The CloudNine Discovery Portal bridges Cloud Connector and CloudNine Review, providing the essential configuration for seamless data uploads. This guide covers the specific steps required to establish your connection and initialize the transfer process.

Step 1: Welcome to CloudNine Discovery Portal

When you launch CloudNine Discovery Portal, you are presented with the **Welcome to CloudNine Discovery Portal** screen.



1. Beneath **Select Data From:** choose **Cloud Connector**.
2. Under **Review Data Using**, **CloudNine Review** is automatically selected.
3. Click **Continue**.

4. You are prompted to **Log In to CloudNine**. Enter the **Email address** you use for CloudNine Review, then click **Continue** and enter your **Password** for CloudNine Review. Verify using the two-factor authentication method you have implemented for CloudNine Review.
5. The **What kind of cloud data are you Uploading?** prompt appears. Choose **Microsoft 365**, then select the **Connection** from the drop-down menu list of active CloudNine Review connectors and click **OK**.

The screenshot shows a dialog box titled "What kind of cloud data are you uploading?". It contains two main options: "Microsoft 365" (Unprocessed data in M365 or O365) and "eDiscovery exported Data" (Exported data from Microsoft eDiscovery Purview...Coming Soon). Below these is a "Select Connection" dropdown menu with "C9365Connector" selected. At the bottom right, there are "Cancel" and "OK" buttons. Red boxes highlight the "Microsoft 365" option, the "Select Connection" dropdown, and the "OK" button.

6. You will now sign in to Microsoft. Enter the **Microsoft login credentials** linked to the Registered App set up in Microsoft Entra ID for the third-party connection.

The screenshot shows a "Sign in to your account" window. It features the Microsoft logo, the text "Sign in", and a text input field labeled "Email, phone, or Skype". Below the input field is a link that says "Can't access your account?". There are "Back" and "Next" buttons. At the bottom, there is a "Sign-in options" link. The window title bar says "Sign in to your account" and the menu bar includes "File", "Edit", "View", "Window", and "Help".

Step 2: Cloud Connector to Review – CloudNine Case

You have selected the Cloud Connector to CloudNine Review workflow. You logged into CloudNine Review, selected the cloud data (Microsoft 365) and Connector, and connected to Microsoft. You are now on the Cloud Connector to Review, Select a CloudNine Review Case.

Cloud Connector to Review

1 CloudNine Case 2 Configure Connector 3 Upload

Select a CloudNine Review Case

Upload name* (Max 100)
DATA REQUEST_ID11111

Search Cases... Create Case

Case Name	Selected
Documentation_M365_202604_001	<input checked="" type="checkbox"/>
TLM_20260414_TEST001	<input type="checkbox"/>

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1. Type the required **Upload name**.
2. Select an existing CloudNine Review project from the **Case Name** list. The selected project is highlighted, and a check mark appears under Selected.
 - a. If this is a new project, select **Create Case** to open the **Create New Case** window. Enter a **Case Name**, select the **Time Zone**, then click **Create**.
 - b. The new case appears italicized in the **Case Name** list and is selected by default. This case is not created in CloudNine Review until the data upload is complete.
3. Click **Next** to proceed to the next screen.

Step 3: Cloud Connector to Review – Configure Connector

On this screen you will select and configure the data to collect and transfer to CloudNine Review.

CloudNine Discovery Portal

Cloud Connector to Review

CloudNine Case Configure Connector Upload

1 Select/Create Custodian

Name(Ex:Last Name,First Name)
 Custodian ID(Ex:email@xyz.com)

2 Collection Options

Collect Calendar Items
 Collect Email
 Collect One Drive

3 Filter by Date

If 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

4 Password List

Enter Password File
Browse...

5 Select the accounts

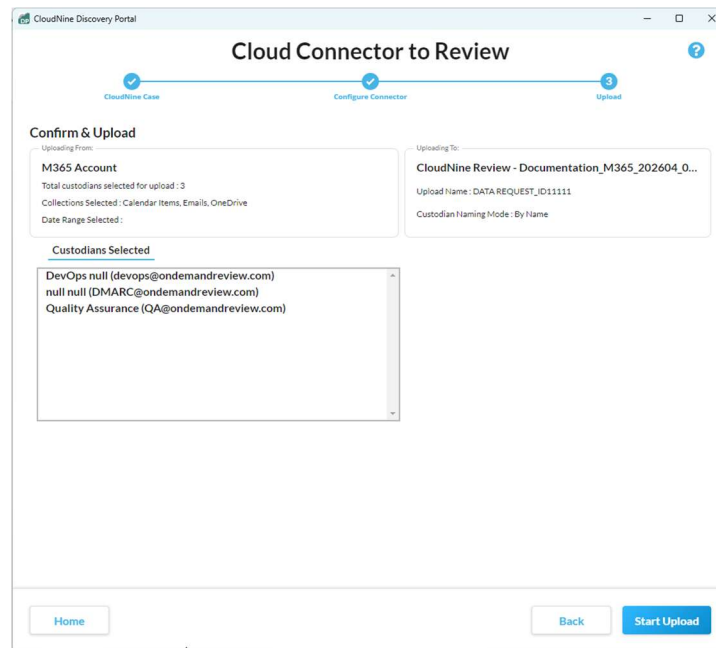
FirstName	LastName	Custodian ID
<input type="checkbox"/>		@ondemandreview.com
<input type="checkbox"/>		@cloudnine.com
<input checked="" type="checkbox"/>	DevOps	devops@ondemandreview.com
<input checked="" type="checkbox"/>	Quality Assurance	DMARC@ondemandreview.com
<input checked="" type="checkbox"/>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

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- 1. Select/Create Custodian:** Choose how the custodian field is populated in CloudNine Review. There are two options: Name or Custodian ID.
- 2. Collection Options:** Choose the data you wish to upload: Calendar items, Email, and/or One Drive.
- 3. Filter by Date:** Enter a Start and End date range for email and calendar items to only send data that fall within the date range selected.
- 4. Password List:** Browse to select a text (.txt) file of known passwords used for the selected accounts. The text file should contain one password per line.
- 5. Select the accounts:** Choose the account(s) you wish to collect from Microsoft 365 and upload to CloudNine Review.
- 6. Select Next.**

Step 4: Cloud Connector to Review - Upload

You are on now on the **Confirm & Upload** screen. This is the final screen to review the data and configuration settings you are uploading from and the CloudNine Review project you uploading to. Select **Back** to return to the previous screen(s) and make any changes. When you are ready, click **Start Upload** to begin the upload process.

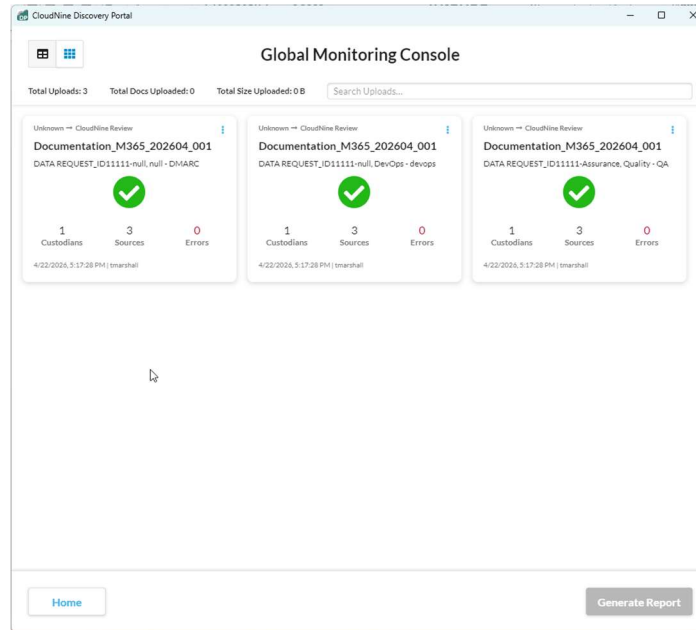


Monitoring the Upload Progress

The data collection and transfer from Microsoft 365 to CloudNine Review. The Global Monitoring Console in CloudNine Discovery Portal and CloudNine Reviews Discovery Queues can be used to monitor the upload progress.

Global Monitoring Console

CloudNine Discovery Portal's Global Monitoring Console provides a complete status when the connection between Microsoft 365 and CloudNine Review is made. Each Selected Account is treated as its own source. In Card View, you will see a card for each selected custodian account. A complete status (green check) indicates the connection has been made and the data transfer is being uploaded to CloudNine Review.



CloudNine Review – Discovery Queue

CloudNine Discovery Portal has completed the connection and initialized the data transfer. Login to CloudNine Review to continue to monitor the progress through **Org Discovery Queue** or **My Discovery Queue**.

To open either Discovery Queue:

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

Upload Name	Project	Engine	Workflow	User	Age	Status	Percent
DATA REQUEST_ID11111-null-DevOps - devops	Documentation_M365_202604_001	Explore		training@cloudnine.com	30 mins	Finished	-
DATA REQUEST_ID11111-null-DMARC	null	Explore		training@cloudnine.com	30 mins	Uploaded	-
DATA REQUEST_ID11111-Assurance, Quality - QA	Documentation_M365_202604_001	Explore		training@cloudnine.com	30 mins	Finished	-
TEST002-Assurance, Quality - QA	TLM_20260414_TEST001	Explore		training@cloudnine.com	6 days 3 hours	Finished	-
TEST002-null-DevOps - devops	TLM_20260414_TEST001	Explore		training@cloudnine.com	6 days 3 hours	Finished	-
TEST002-null-DMARC	TLM_20260414_TEST001	Explore		training@cloudnine.com	6 days 3 hours	Finished	-
TEST-Support, Tech - support	TLM_20260414_TEST001	Explore		training@cloudnine.com	8 days 2 hours	Finished	-

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