

# CloudNine™ Explore Web

## User Guide

CloudNine™ Explore Web Version 7.11.75

- **About the Case Dashboard**
- **Searching**
- **Near-Duplicate & Email Threading**
- **Reviews**
- **Administering CloudNine™ Explore Web**

# CloudNine™ Explore Web User Guide

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CloudNine™ LAW  
CloudNine™ Concordance®  
CloudNine™ Explore  
CloudNine™ Explore Web

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# CloudNine™ Explore Web

User Guide

Welcome to Explore

Chapter

1

## Welcome to Explore



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### Resources:

- [Customer Support](#)
- [Release Notes](#)
- [Subscribe to Release Notifications](#)

### Found in this Answer Center:

- [System Requirements](#)
- [Licensing Information](#)
- [Installation Instructions](#)

CloudNine™ Explore and CloudNine™ Explore Web help legal professionals and their service providers meet the increasing demands in the discovery of printed and electronic documents.

In practice, Explore and Explore Web support several key processes.

## Prefilter large document sets

CloudNine™ Explore is a standalone prefiltering module available with the CloudNine™ LAW suite. Use it to implement high volume electronic discovery productions. CloudNine™ Explore indexes, filters, and produces export sets. Culled documents are passed directly to CloudNine™ LAW for full expansion and production. For more information see **Filtering**.

## Tag documents

You can tag documents as part of the prefiltering process in CloudNine™ Explore. Tags can be used to easily identify documents as needed. For example, you can tag documents that are responsive or need to be converted to TIFF. Tagging makes your projects easier to produce. For more information see **Tagging**.

## Reporting

CloudNine™ Explore offers reporting on document time-line, exceptions, export exclusion and inclusion, file types, language and much more. See **Creating Reports** for details.

## Export to CloudNine™ LAW

You can generate an export set in CloudNine™ Explore and send it to a CloudNine™ LAW case or a native file output directory. The export function also allows you to override filtering to include entire e-mail threads containing a filtered document or to only export filtered items with a specified tag. See **Exporting** for details.

## Analyze and Review using CloudNine™ Explore Web

You can connect to your data via Web browser, conduct analysis, reviews, and more by connecting CloudNine™ Explore to CloudNine™ Explore Web. For more information see [Using CloudNine™ Explore Web](#).



# CloudNine™ Explore Web

User Guide

## CloudNine Explore Web

Chapter

2

## CloudNine Explore Web

### *Installation*

#### **System Requirements**

CloudNine™ Explore Web requires a Web server for hosting the CloudNine™ Explore Web application's Web site.

<b>Computer/Processor</b>	8 core 2.5+ GHz
<b>Memory (RAM)</b>	32+ GB  It is recommended that systems have 4GB of RAM per 1 processing core.
<b>Hard Drive</b>	Solid State Drive w/ 100 GB+ free space
<b>Display</b>	1080p monitor resolution
<b>Network</b>	10/100 Mbps. Gigabit recommended.  MS Domain network required
<b>Operating System</b>	Microsoft Windows 10 or 11  Microsoft Windows Server 2016 (version 1809)  Microsoft Windows Server 2019 (version 1903)

	Only 64-bit versions of Microsoft Windows are supported.
<b>IIS</b>	IIS 10+  IIS 10+ is included in Windows Server 2016 and Windows 10.
<b>Supported Client Browsers</b>	Chrome 78 or later  Mozilla Firefox 68 or later  Microsoft Edge 40 or later  It is important to keep Internet browsers up-to-date. Browser vendors release often and, in most cases, auto update. Installing these updates are important for the security of your environment and allows Explore Web to use features of the modern web.

## **Web Server Relationship to other CloudNine Explore Components**

It is best practice to host CloudNine Explore Web on a dedicated machine to be assigned as your Web Server; ideally, no other CloudNine Explore components should be installed on this machine.

CloudNine Explore Web connects to a Management Store database, and to case databases and folders located on other server(s).

Ensure that your CloudNine Explore Web installation matches the version number of your CloudNine Explore install. If you upgrade your CloudNine Explore environment, you'll need to upgrade your CloudNine Explore Web server as well.

## **Web Site Security**

To ensure that the CloudNine Explore Web application's Web Site is secure, it's important to configure the Web server with appropriate accounts and settings. This includes proper Windows Server security and account setup, proper IIS security and account setup, use of HTTPS for the Web site, and proper SQL Server security and accounts.

In addition, user accounts set up in the CloudNine™ Explore Web application need appropriate access to required directories and cases.

For the configuration of the server components, it is highly recommended that you consult with your IT resource. If the Web site is expected to be public facing vs internal or an intranet, then security setup should be of greater concern.

Using HTTPS is essential for the Web site's security. To ensure cookies are HTTP-only and secure when settings up HTTPS, do the following:

1. Add the following information to the web.config file in the <system.web>: `<httpCookies httpOnlyCookies="true" requireSSL="true" />`



2. Set the IIS Forms Authentication to require SSL:
  - a. In the Internet Information Services (IIS) Manager, select IIS Authentication.
  - b. Right-click Forms Authentication, and then select Edit.
  - c. Select the Requires SSL check box.



d. Click OK to save your changes.

## CloudNine Explore Web Accounts

CloudNine Explore Web User accounts and their role(s) determine what the User can do (create reviews, access specific cases, etc).

There are currently two roles available for User accounts in CloudNine™ Explore Web:

- **Administrator** - The administrator is an account for managing all User accounts and can create, update, and delete Users, reset passwords, and assign Users to cases. They may also create and manage other administrator accounts.



Administrator accounts have access to all cases. The administrator account should be used only for the staff that require this high level of access to manage other Users.

- **User** - The standard User account has access only to the cases that they have been assigned to and can be granted full access or read-only access. A standard User account with full access can apply filters, create and run searches, perform filter and search analysis, and create and apply tags in the assigned cases. Users with read-only access can only view case data in CloudNine™ Explore Web.

To manage Users and case assignments, CloudNine™ Explore Web uses Clients for grouping. When a case is created in CloudNine™ Explore, a Client can be assigned as a case property via the New Case Settings or the Edit Case Settings dialog box.

To assign a User to a case in CloudNine™ Explore Web, the User must first be assigned to a Client. Once the User is assigned to a Client, that User can be assigned to any cases associated with the Client.

Users can only be given access to cases that are also associated with the same Client as their User account. Access to each case is explicit and must be configured for each User.

In CloudNine™ Explore Web, Users are assigned to Clients on the Create User > Edit [administrator name] page, or Add Users: [client name] page.

## Installing CloudNine Explore Web

### Prerequisites for Installation

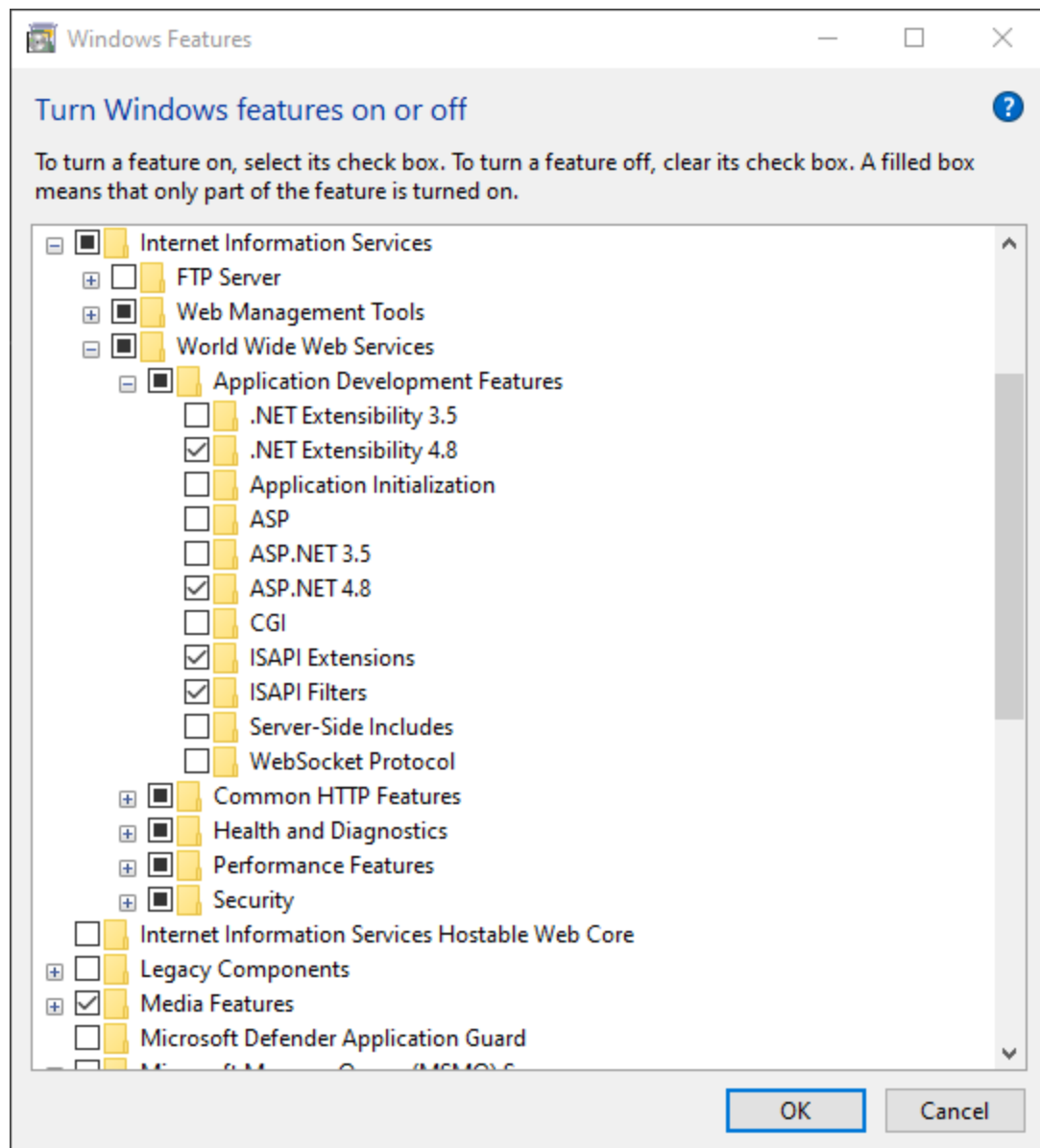
- CloudNine™ Explore Web is intended for 64-bit systems only and should fail on 32-bit systems.
- You must have at least IIS 6.0 installed in order to install Explore Web.
- Explore Web requires an installation of CloudNine™ Explore desktop. If you have never run Explore desktop previously, you should run it at least once before installing Explore Web to allow the appropriate database to be created.

## IIS Installation

### Windows 10

1. Open the **Windows Features** dialog.
2. Expand the **Internet Information Services** feature.
3. Turn on both the **Web Management Tools** and **World Wide Web Services** features.
4. Expand **World Wide Web Services**, and ensure that both **.NET Extensibility 4.8** and **ASP.NET 4.8** are also turned on.

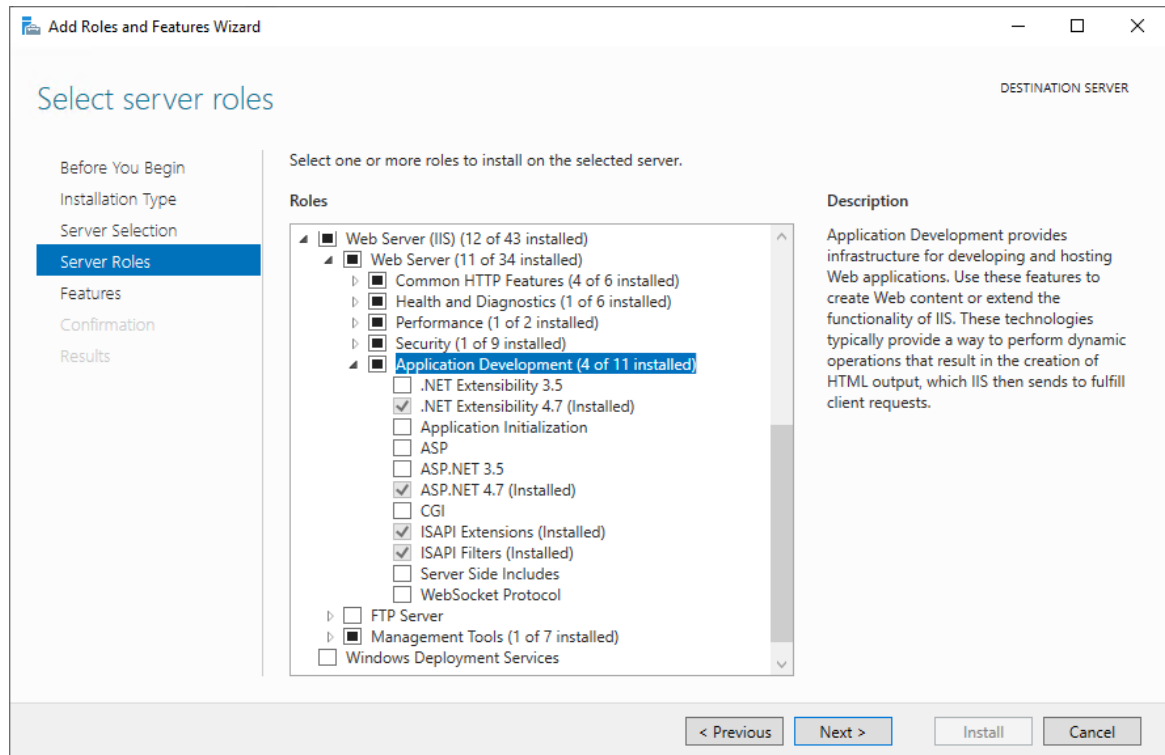
5. Click OK to close the **Windows Features** dialog and accept these changes.



## Windows Server

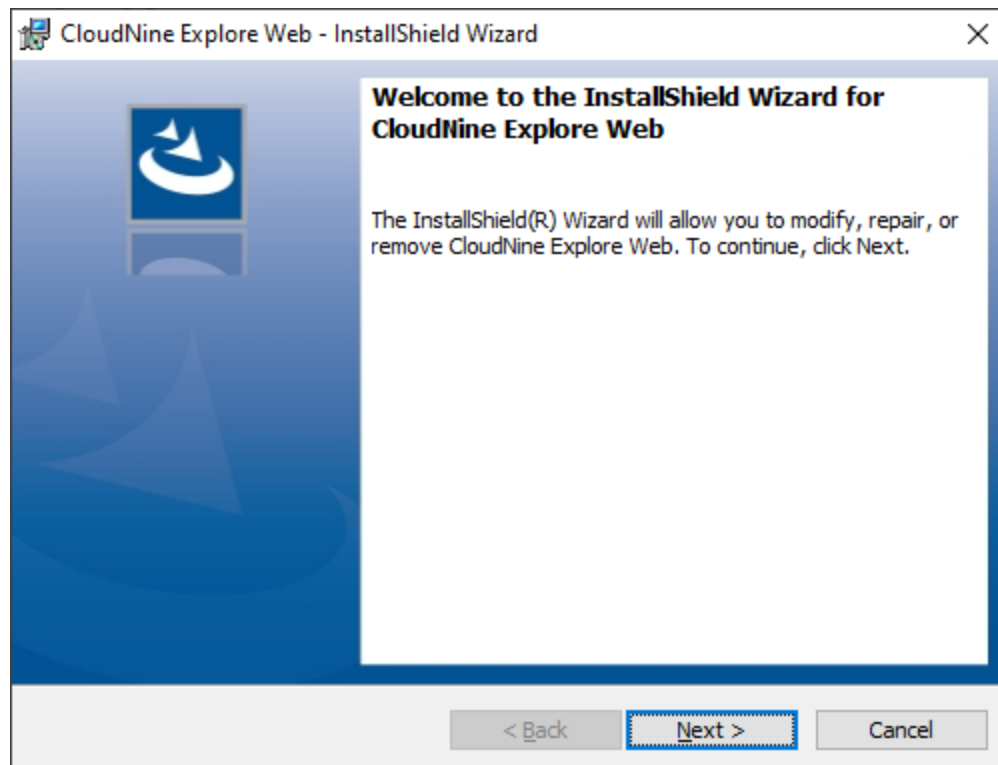
1. Run the **Add Roles and Features Wizard**.
2. Under **Server Roles** section, add the **Web Server (IIS)** feature.

- Expand **Web Server (IIS)**, then **Web Server**, and finally **Application Development**.
- Ensure that both the **.NET Extensibility 4.7** and **ASP.NET 4.7** features are also added.
- Finish the **Add Roles and Features Wizard** to save these changes.



## CloudNine™ Explore Web Installation

- Run the CloudNine Explore Web installation executable. The **Welcome** screen displays.



2. Click **Next**. The **Destination Folder** screen displays.
3. By default CloudNine Explore Web installs in <SysDrive>:  
\inetpub\wwwroot\EdaWeb. You can click **Change** to alter the installation location. When you have your installation location specified, click **Next** to continue. The **IIS Application Configuration** screen displays.

**CloudNine Explore Web - InstallShield Wizard**

**IIS Application Configuration**

Specify the port for the IIS Web Site and a user name and password for the IIS Application Pool.

Specify the port that the IIS Web Site will run on.

Port Number:  
80

Application Pool Identity

Default Application Pool Identity  
 Specific User:

User name:  
[ ] Validate User

Password:  
[ ]

Note: This user account should have access to any network resources used by CloudNine Explore and must be in the form DOMAIN\Username.

InstallShield

< Back Next > Cancel

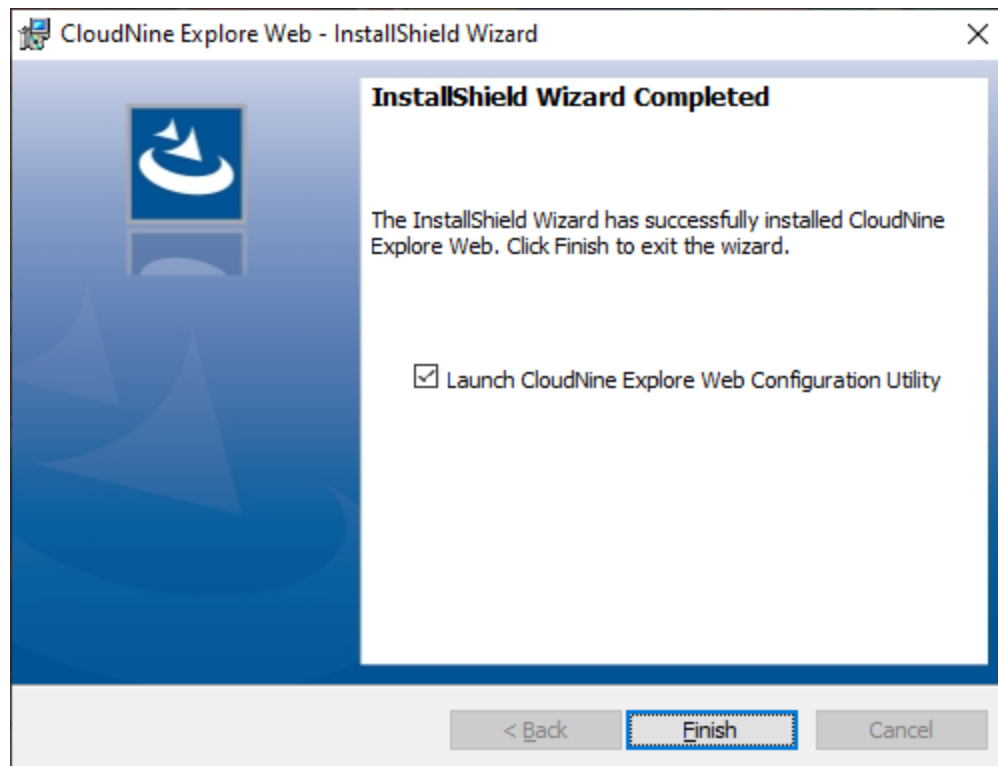
4. The **Port Number** field defaults to **80**. The default value, 80, may conflict with the default IIS site configuration. The **Application Pool Identity** is the identity that the IIS application will run as. Select one of the following options:

- **Default Application Pool Identity** - The **Default Application Pool Identity** option uses the default user set up when IIS was initially configured. This default user usually has rights on the local system but not on a network. The **Default Application Pool Identity** option should only be used if the CloudNine™ Explore data will be hosted locally on the same server where CloudNine™ Explore Web is installed.
- **Specific User** - The **Specific User** option allows CloudNine™ Explore Web to be run under a specific user account. This option should be used when CloudNine™ Explore Web will require access to data stored on a network resource. The user specified should also have access to the data location for CloudNine™ Explore.
  - If you selected the **Specific User** option, in the **User name** and **Password** fields, type the user name and password for the user with access to the domain and network containing the CloudNine™ Explore data. Click the **Validate User** button.



The **Validate User** button confirms the user credentials for the domain, not the user's network access to CloudNine Explore resources.

5. Click **Next**. The **Ready to Install** screen displays.
6. Click **Install**. The installation completes and the Wizard Completed screen displays.



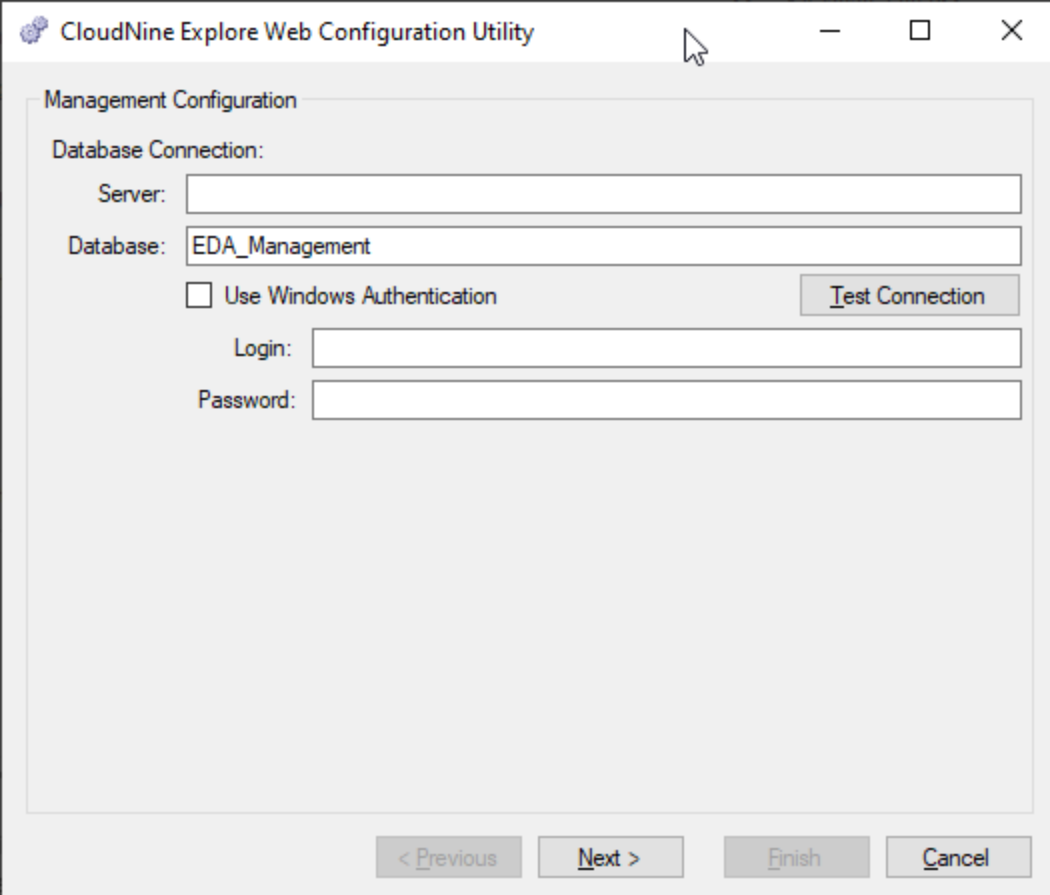
7. You will need to configure the database settings and create the initial administrator account for CloudNine Explore Web using the CloudNine Explore Web Configuration Utility. To proceed with configuration, leave the **Launch CloudNine Explore Web Configuration Utility** box checked and click **Finish**. If you want to complete configuration later, deselect the checkbox and you can run the configuration utility from Windows Start at a later time.

## **CloudNine Explore Web Configuration Utility**

The CloudNine™ Explore Web Configuration Utility is used to setup the management store and the initial administrator for CloudNine™ Explore Web after installation. The CloudNine™ Explore Web installation adds the utility to the CloudNine™ LAW programs location and it can be accessed from the Start Menu. The utility can be run at any time to configure the Management Database, but will only create the initial administrator if there are no other administrators in the Management Database.

1. Run the Explore Web Configuration Utility. This will run automatically after installation of Explore Web if you select Launch CloudNine Explore Web Configuration Utility. Alternately you can run the utility by selecting CloudNine Explore Web Configuration Utility from the CloudNine LAW folder in Windows Start.
2. The **Management Configuration** screen displays.





CloudNine Explore Web Configuration Utility

Management Configuration

Database Connection:

Server:

Database:

Use Windows Authentication

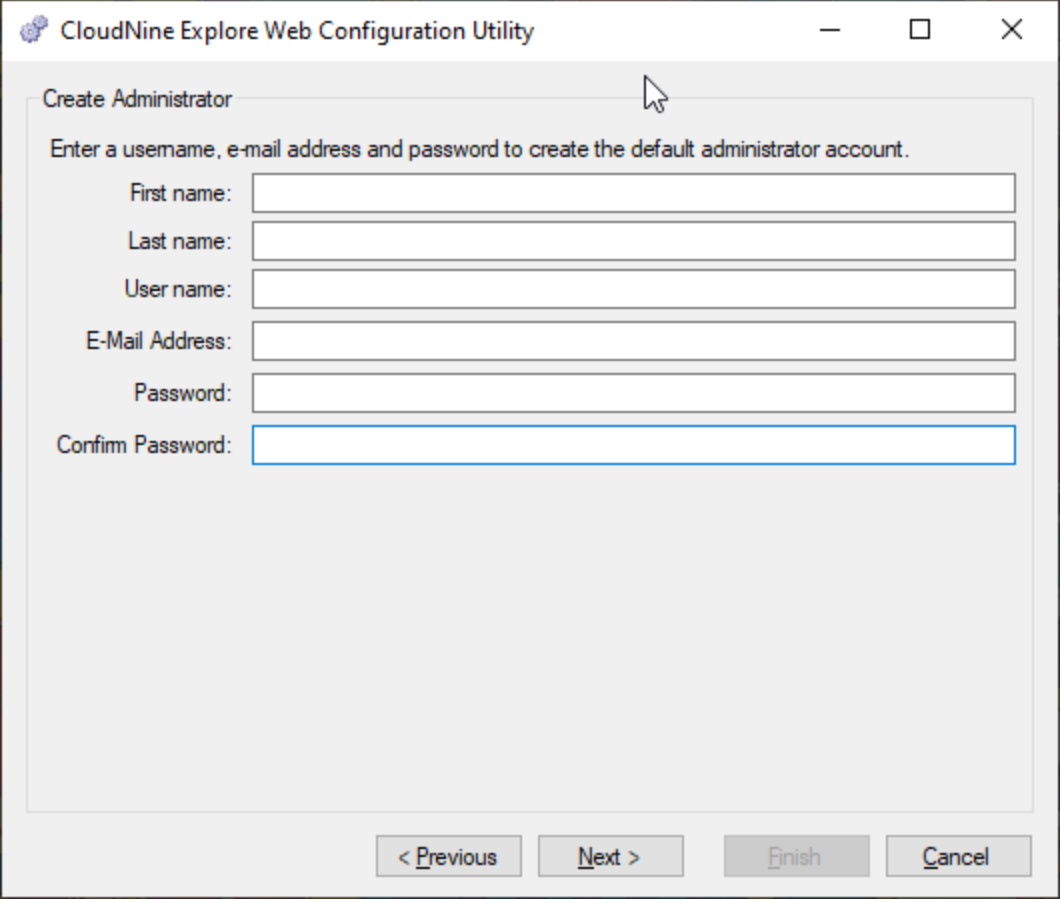
Login:

Password:

< Previous   Next >   Finish   Cancel

3. For **Server**, enter the computer name for the CloudNine Explore SQL database server. You can use localhost as your **Server** if your database server is running on the same computer where the CloudNine Explore cases are created.
4. **Database** defaults to EDA\_Management. This needs to be the database containing the cases that CloudNine Explore Web will be accessing.
5. Select your authentication method:
  - a. Select **Use Windows Authentication** if you want to use your current Windows login as credentials for connecting to SQL Server.
  - b. You can use SQL Authentication by deselecting **Use Windows Authentication** and then entering valid **Login** and **Password** details for a user account that has access to the database.

6. Click **Test Connection** to verify the connection to the database. A message displays indicating whether the connection succeeded. If the connection failed, review what was entered as your **Server** and contact your database administrator to verify you have the correct information. Also the supplied credentials (either Windows login or specified Login/Password) must have the SQL Server dbcreate permission enabled for it.
7. Click **Next**. The **Create Administrator** screen displays.



The screenshot shows a window titled "CloudNine Explore Web Configuration Utility" with a "Create Administrator" tab. The window contains a form with the following fields and instructions:

- Instruction: "Enter a username, e-mail address and password to create the default administrator account."
- Fields: "First name:", "Last name:", "User name:", "E-Mail Address:", "Password:", and "Confirm Password:".
- Buttons: "< Previous", "Next >", "Finish", and "Cancel".

8. If this is the first time running CloudNine Explore Web Configuration Utility, you will be prompted to input information to create the initial administrator for CloudNine Explore Web. All fields on the **Create Administrator** screen are required, and the password fields must meet CloudNine Explore Web password requirements.
  - a. Enter the administrator's **First name**.
  - b. Enter the administrator's **Last name**.

- c. Enter the administrator's **User name** for logging into CloudNine Explore Web.
- d. Enter the administrator's **E-mail Address**.
- e. For **Password** and **Confirm Password**, enter the administrator's CloudNine Explore Web password.

#### Password Requirements:



- Must be at least 8 characters, including spaces
- Cannot exceed 150 characters
- Must contain one number
- Must contain one special character from this list: ` ~ ! @ # \$ % ^ & \* ( ) - \_ + = [ ] { } | \ / : ; " ' < > , . ?
- Must not be the same as your previous password
- Must not contain your user name or e-mail address

9. Click **Next**. The **Summary** screen displays.
10. Review the details displayed. If you need to edit any settings, click **Previous** to go back and make applicable changes. Click **Finish** to complete the configuration. The database settings will be added and if no administrators exist, the initial CloudNine Explore Web administrator is created.

## Additional Steps for CloudNine Explore Web Setup

Once the CloudNine™ Explore Web installation and configuration is completed, there are several additional tasks that may need to be performed. Details for these tasks are in the following sections.

- Setup HTTPS for the CloudNine Explore Web Site

- Configure Permissions for Error Logging
- Resolve conflicts in IIS Installation

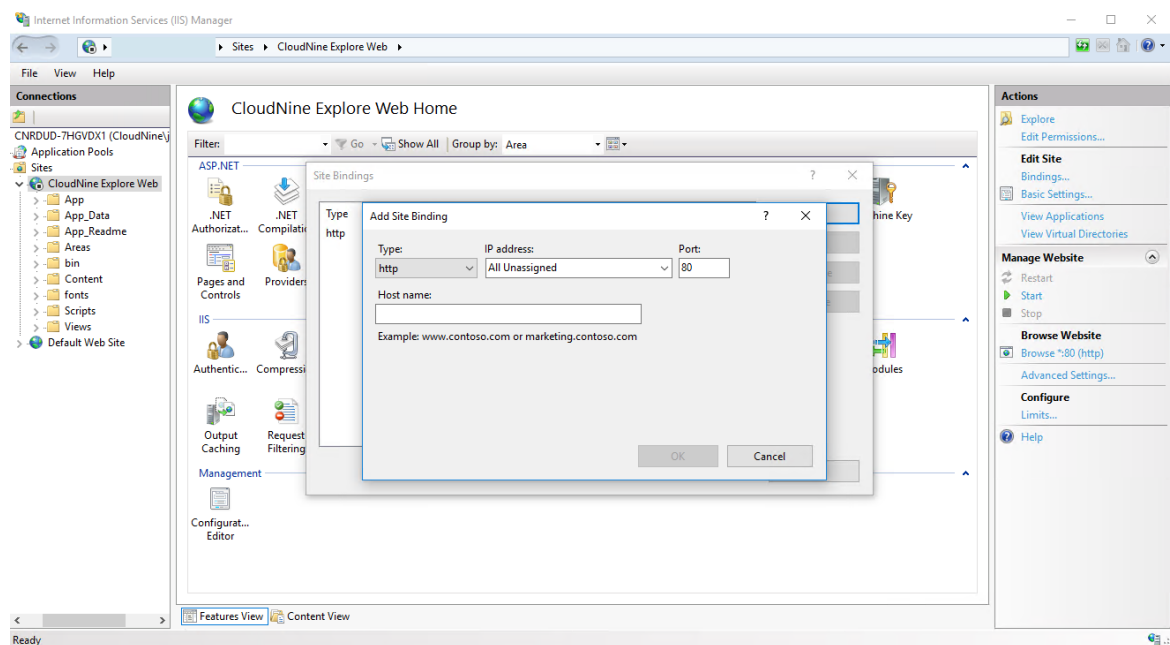
## Setup HTTPS for the CloudNine Explore Web Site

It is highly recommended to have IIS only serve CloudNine™ Explore Web using HTTPS. This can be configured in Internet Information Services Manager (Start > Run > inetmgr).

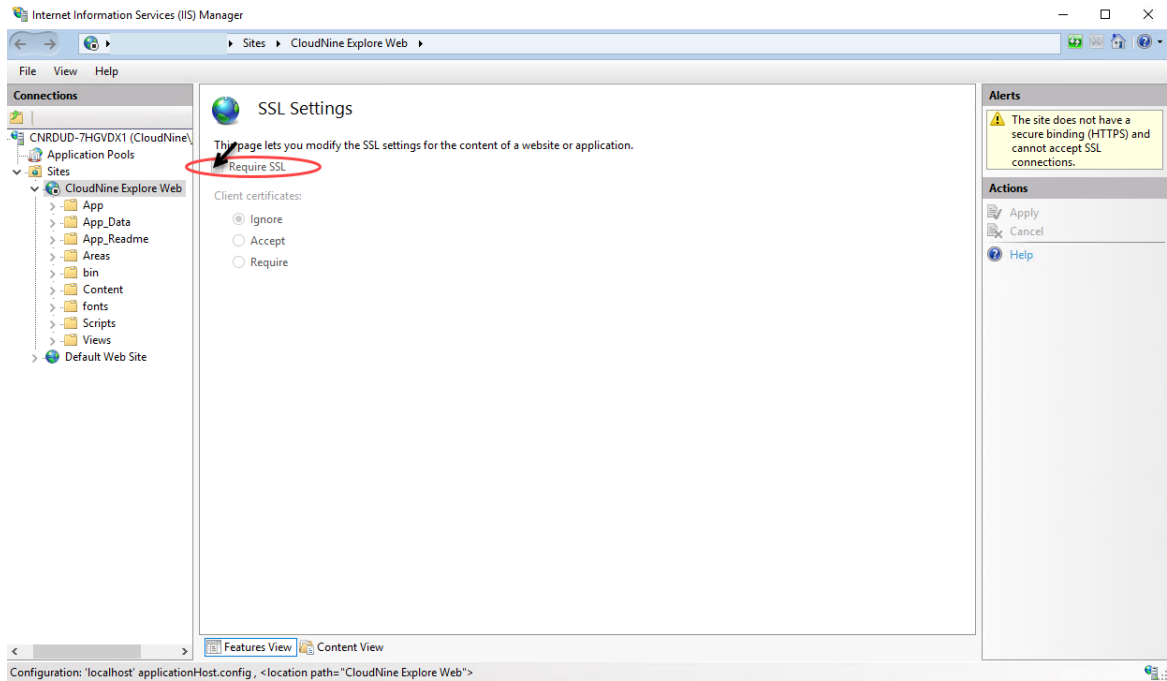


This process is optional but highly recommended to be configured by your IT/security department.

1. Configure the site bindings for https. If your organization has a certificate already setup with a certificate authority you can use that. Alternatively, if you are hosting internally and do not have a certificate with an authority, you can setup a machine certificate. It is recommended to check with your IT or security team to determine the appropriate certificate to use.

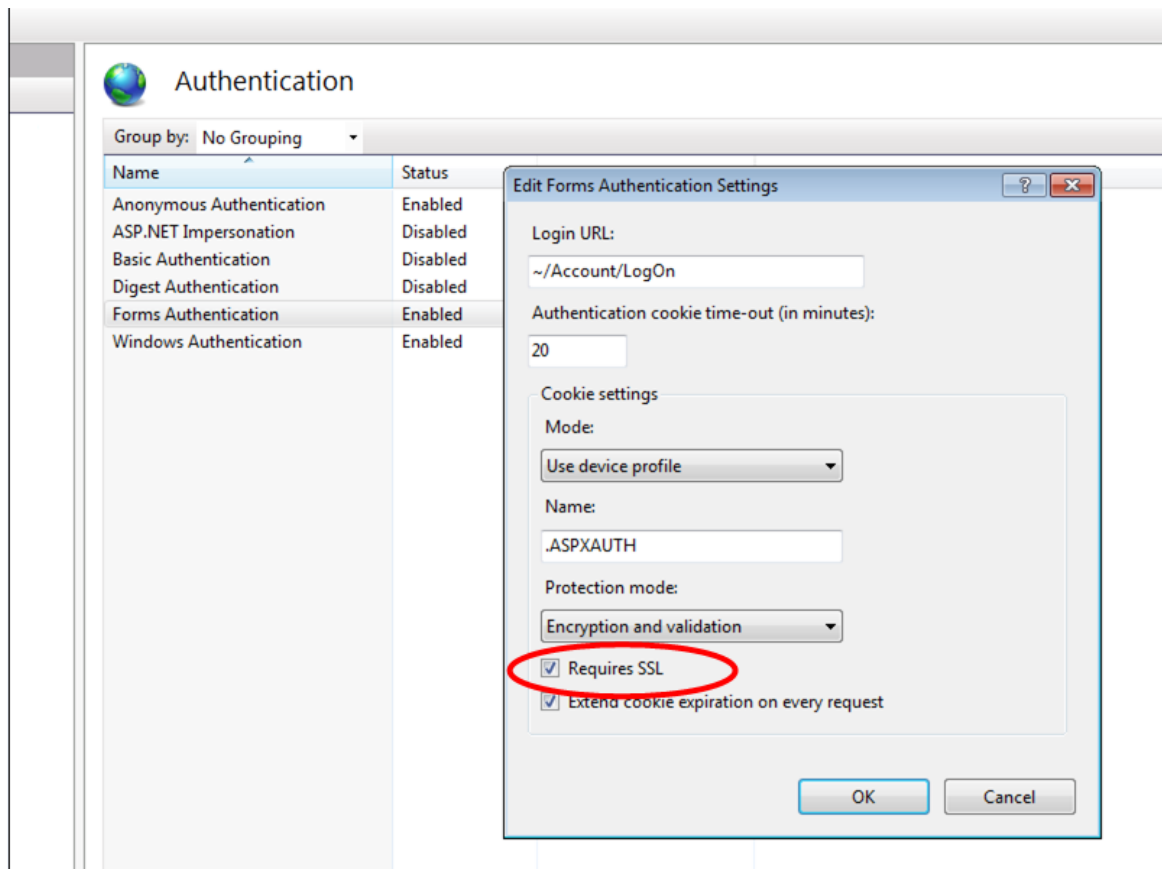


2. Configure IIS SSL settings to require SSL. From Internet Information Services Manager (Start > Run > inetmgr), select SSL Settings for the CloudNine™ Explore Web site and select the **Require SSL** check box.



3. Additionally, the cookies should be setup to be httpOnly and Secure. To configure this, edit the web.config file and add the line below to the <system.web> section  

```
> <httpCookies httpOnlyCookies="true" requireSSL="true" />
```
4. After editing the web.config file, the Forms Authentication for the site has a setting for SSL cookies that overrides the web.config setting and needs to be changed. From Internet Information Services Manager (Start > Run > inetmgr), select the IIS Authentication for the CloudNine™ Explore Web site. Edit the Forms Authentication and select the Requires SSL check box.



## Configure Permissions for Error Logging

The App\_Data\XML\_Logs directory must have its permissions changed to allow read/write/modify access to it by the account that was configured for the application pool of CloudNine™ Explore Web. The App\_Data\XML\_Logs is located in the installation folder for example: C:

\inetpub\wwwroot\EdaWeb\App\_Data\Xml\_Logs.

CloudNine™ Explore Web is configured to use IIS httpErrors for friendly error page redirection and to use ELMAH for error logging and display.

As indicated, the App\_Data\XML\_Logs directory must have permissions changed to allow read/write/modify access to it by the account that was configured for the application pool of CloudNine™ Explore Web.

As configured, the ELMAH logs can be viewed by a browser running local on the Web server by the following url: <https://localhost/elmah.axd>

The ELMAH url presents the error logs in a nicely formatted html display. You may also view the error files in their raw xml format by navigating to the App\_Data/XML\_Logs directory under the Web site with Microsoft Windows Explorer. Each error is recorded in its own .xml file.



Although it is possible to re-configure ELMAH to allow remote viewing of the error logs, it is highly recommended for security reason to keep viewing restricted to local access only.

## Resolve conflicts in IIS Installation

Installing to a new IIS installation will likely have the default Web site using the same ports that CloudNine™ Explore Web is setup to use. This conflicts with other sites hosted in the same server and will need to be resolved.

For example, CloudNine™ Explore Web may need to be started and the default Web site in IIS may need to be stopped.

## Troubleshooting CloudNine Explore Web

Below are several common error messages and their associated resolutions that can occur while setting up and accessing CloudNine™ Explore Web.

## TimeZoneOffset field is required

### Error Message

Login was unsuccessful. The TimeZoneOffset field is required.

### **Possible Causes**

1. Internet Explorer running in compatibility mode.
2. JavaScript not enabled for browser.
3. Cookies not enabled for browser.

### **Resolutions**

For cause 1:

1. Turn off compatibility mode in Internet Explorer (Tools menu > Compatibility View Settings).
2. Ensure that the site is NOT listed in the sites for compatibility view AND the make sure the following 2 check-boxes at the bottom are NOT selected.
  - Display intranet sites in Compatibility View
  - Display all websites in Compatibility View

For cause 2 and 3:

- Confirm security settings of browser, and ensure JavaScript and cookies are enabled.

## **Unable to authorize application on license server**

### **Error Message**

Login was unsuccessful. Unable to authorize application on license server.

### **Possible Causes**

1. License server setting incorrect.



2. License server has been changed.

## Resolutions

Restart IIS Service:

1. Start > run > services.msc
2. Stop the World Wide Web publishing service
3. Start the World Wide Web publishing service

If problem still persists, confirm the current license server setting is pointing to the expected server.

From SQL Server Management Studio, connect to the SQL Server and database that is being used for the CloudNine™ Explore Management Store (ie (local).EDA Management). If you are not sure of the current Management Store, either the web.config can be checked looking at the EDA\_ManagementConnectionString or use the CloudNine™ Explore Web Configuration Utility to confirm.

View the settings in the CloudNine™ Explore Management db within the table dbo.EdaSharedProperties. The name of the setting is LicenseServer and the value column contains the server name.

If making changes to the settings in the database, the IIS service must be restarted on the Web server to pick up the change. This requires an IIS Service restart and not just a restart of the Web site.



If the license server setting is correct, then it may be that the license server is not operating properly (possible restart required of the license server) or that the recent value change and the Web application are still trying to use the old value.

The CloudNine™ Explore Web application will check the license server setting automatically once each day (processing the first request after midnight). Restarting the IIS service will force the Web application to check the server setting on application start.

## No licenses available

### Error Message

Login was unsuccessful. No licenses available.

### Possible Causes

1. Installed CloudNine™ LAW version is older than version 6.3.37.
2. Licenses are not refreshed.
3. All CloudNine™ Explore Web licenses are already in use.

### Resolutions

- Confirm CloudNine™ LAW version 6.3.37 or later is being used. This is the minimum version required since this is the first version to support CloudNine™ Explore Web.
- Refresh licenses and confirm CloudNine™ Explore Web licenses are listed.
  - From Law Profile Manager select **File > Refresh License From Internet**.
  - After refresh complete, click the **Advanced** button and look at the licenses for the key(s). Confirm the **ED Analyzer: Web User** shows the expected number of licenses.
- If some users are able or have been able to connect then it is possible that the number of licenses purchased does not match current usage needs. Current licenses in use can be confirmed from the Law Profile Manager. Click the **Advanced** button and look at the licenses for the key(s). Then confirm the **ED Analyzer: Web User** license shows the expected number of free licenses and licenses that are in use.

## The user account is locked

### Error Message

Login was unsuccessful. The user account is locked, please contact the site administrator to unlock the account.

### Possible Causes

After 5 incorrect login attempts within 10 minutes, the user account is automatically locked

### Resolutions

- The account will unlock automatically 1 hour after last failed attempt.
- An administrator user can unlock the account.

## General Website Error

### Error Message

General Website Error. Sorry, an error occurred while processing your request.

### Possible Causes

Various causes. This is a generic message sent back to the browser when an exception has occurred on the server. The details of the error are not sent to the browser for security reasons.

### Resolutions

Navigate to the URL <http://localhost/elmah.axd> from a browser local on the Web server to identify the error details which can then be used as a starting point for troubleshooting. (Please see [Installing CloudNine™ Explore Web](#) more information on error handling and ELMAH).

## No cases available

### Error Message

No cases available.

### Possible Causes

The current user account has not been assigned to any cases.

### Resolutions

Have an administrator assign the user to a case or cases from the Administration module in CloudNine™ Explore Web.

## Unable to open case

### Error Message

Unable to open case - unspecified error

### Possible Causes

Various causes.

### Resolutions

Navigate to the URL <http://localhost/elmah.axd> from a browser local on the Web server to identify the error details which can then be used as a starting point for troubleshooting. (Please see [Installing CloudNine™ Explore Web](#) more information on error handling and ELMAH).

## Invalid Case Directory

### Error Message

Invalid Case Directory: Unable to open case. Please verify the location of the case directory. Case directory not found at: <CASEDIRECTORYPATH>

### Possible Causes

1. Case directory does not exist.
2. Case directory is not accessible.
3. The account used for the CloudNine Explore Web IIS application pool does not have permissions to the location.

### Resolutions

- Confirm that the directory specified in the error message is correct and does exist.
- Confirm that the directory is accessible from the Web server to that location.
- Confirm that the account used by the CloudNine Explore Web IIS application pool has permissions to the case directory specified.

The application pool identity that is configured can be confirmed or changed in Internet information Services Manager (Start > Run > inetmgr). Click **Application Pools** in the left pane under the server name. In the center pane, right-click **CloudNine™ Explore Web** and then click **Advanced Settings**. The identity setting under the Process Model section shows how the Web app will access the resources.

After confirming the identity being used by the application pool, confirm that account has access to the case directory. This can be done from Windows Explorer. Navigate to the directory and right-click the folder. Select security and confirm the account has access.

Below is an example of adding the ApplicationPoolIdentity account access to the case directory (note: this account can only be used if the Web server also has the

case directories and SQL Server all on the same box, if that is not how your components are deployed then either a Network Service account or specific user account in the domain should be used for the application pool identity)

Add IIS APPPOOL\CloudNine™ Explore Web as a user to give rights to case directory:

1. Open case directory from Windows Explorer.
2. Right-click Case folder.
3. Click Add.
4. Set 'location' to that machine.
5. Add IIS APPPOOL\CloudNine™ Explore Web and give full control.

## SVG Support Required

### Error Message

SVG Support Required. This feature requires a browser with SVG support.

### Possible Causes

1. Browser does not have SVG support.
2. Browser does not have support for ECMAScript 5.

### Resolutions

Use any one of the supported browsers. See Supported Client Browsers in the [System Requirements](#).

## ***Using CloudNine Explore Web***

CloudNine™ Explore Web provides a central location where you can view information associated with documents in an Explore case, including email threads, near-duplicates, duplicates, metadata, and tag information. Depending on your role in CloudNine™ Explore Web, you can also:

- Manage tags for individual documents
- View a document's native file from the **EXPLORE** page
- Run searches against filtered case records
- Perform **Case Review** (as a standard reviewer, or administrator)

### **Getting Started**

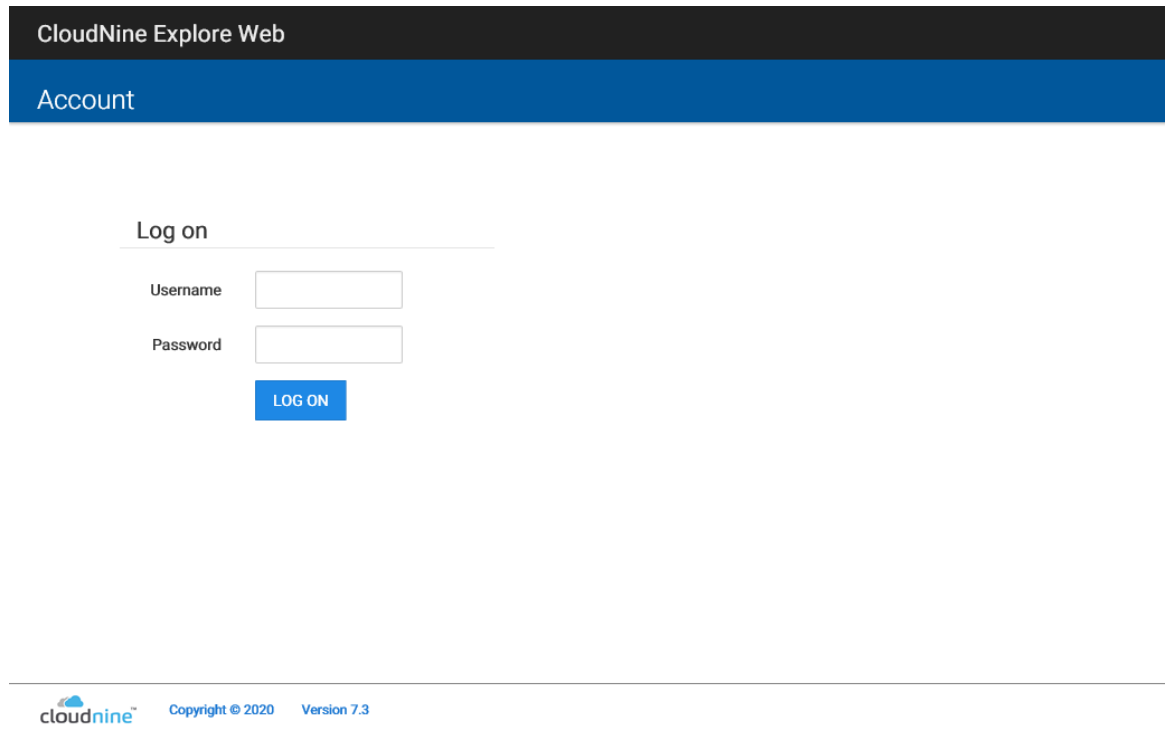
#### ***Logging On***

To log on to CloudNine™ Explore Web, you will need the following:

- CloudNine™ Explore Web application URL
- User name and password, which may be created in CloudNine™ Explore Web, or may be your existing network user name and password.

## **Logging on to CloudNine™ Explore Web**

1. Using a supported web browser, open CloudNine™ Explore Web by typing one of the following in the browser address bar:
  - a. IP address of the computer hosting CloudNine Explore Web.
  - b. Name of the computer hosting CloudNine Explore Web.
  - c. The outside facing Web address.



The screenshot shows the 'CloudNine Explore Web' interface. At the top, there is a dark blue header with the text 'CloudNine Explore Web'. Below this is a blue bar with the text 'Account'. The main content area is white and contains a 'Log on' section. This section has a horizontal line above it. Below the line, there are two input fields: 'Username' and 'Password'. Below the 'Password' field is a blue button with the text 'LOG ON'. At the bottom of the page, there is a footer with the CloudNine logo, 'Copyright © 2020', and 'Version 7.3'.

2. In the **Username** field, type your CloudNine™ Explore Web user name. If your administrator or user account is enabled for **Active Directory** logon, then type your network user name into the **Username** field.
3. In the **Password** field, type your CloudNine™ Explore Web password. If your administrator or user account is enabled for **Active Directory** logon, then type your network password into the **Password** field.
4. Click **LOG ON**. The **Cases** page is displayed.
  - i. If your account was set up to have you change your password the next time you log on, the **Change Password** page opens. Use the form provided to create a new password following the requirements below.

#### Password Requirements:



- Must be between 8 and 126 characters, including spaces
- Must contain at least one number



- Must contain at least one special character from this list: ` ~ ! @ # \$ % ^ & \* ( ) - \_ + = [ ] { } | \ / : ; " ' < > , . ?
- Must not be the same as your previous password

If you try to log on five times within a ten minute period using an unrecognized user name and password combination, your user account will be locked, and the following message is displayed:



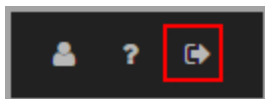
*Login was unsuccessful. The user account is locked, please contact the site administrator to unlock this account.*

By default, when a user account is locked for this reason, the user account will automatically be unlocked after 60 minutes. To unlock your account, you can contact the site administrator to unlock the account, or wait 60 minutes. This does not apply to **Active Directory** user accounts.

## Logging off CloudNine™ Explore Web

You can log off CloudNine Explore Web in two ways:

1. Close the browser tab.
2. Click the log off button in the upper right hand corner.



### Updating User Information

The **Account** page allows you to update your first and last name, email address, and password. To access the **Account** page, click on the account icon in the upper right hand corner.



Your user name is displayed when you hover over the account icon. Your user name is not editable.

CloudNine Explore Web

Cases Administration ? ↗

## Account

First name

Last name

Email address

Current password

New password

Confirm new password

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Edit any of the displayed fields as needed. Passwords must meet the [password requirements](#). Click **SAVE CHANGES** when you have completed your updates.



If CloudNine Explore Web was setup so that you use your network user name and password, you will only be able to view your account information and not edit it.

### Adjusting the Layout

You can adjust the panel layout on the **FILTERS**, **SEARCH**, and **EXPLORE** pages to suit your needs, including changing the width of any panel and you can hiding/showing the left or right panels.

## Adjusting the Display of Panels

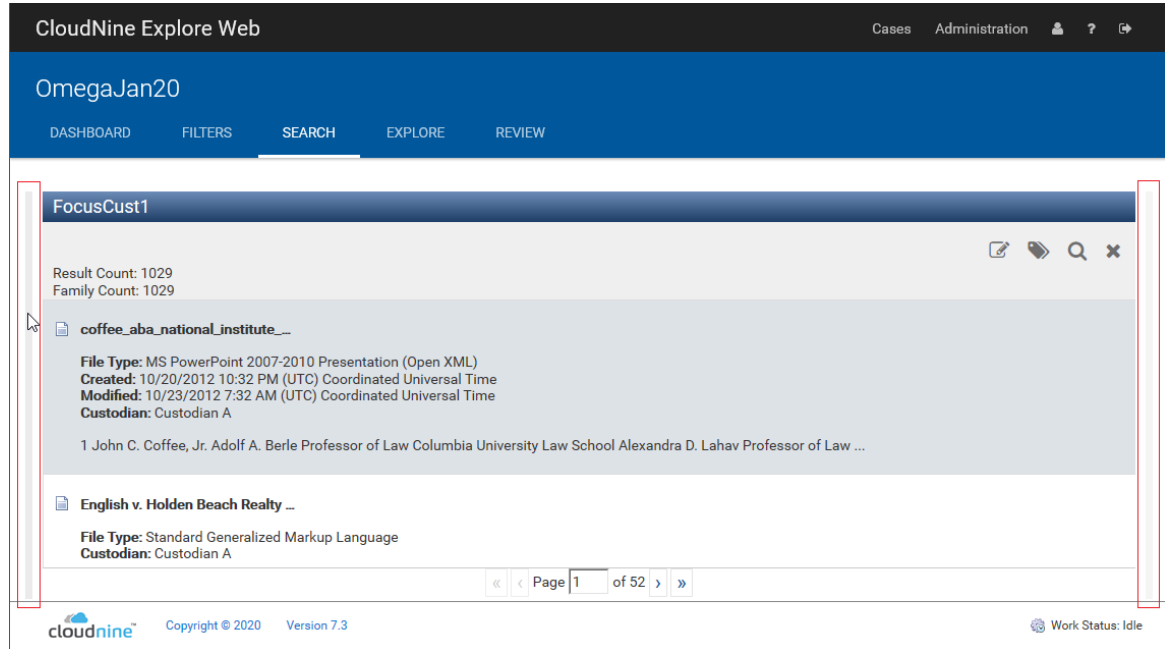
On the **FILTERS**, **SEARCH**, or **EXPLORE** pages, click on the vertical bar between panels. The cursor changes from a pointer to horizontal arrows. Click and drag left or right to change the panel widths.

Double click on the left vertical bar to collapse the left panel. Double click on the right vertical bar to collapse the right panel.

The screenshot shows the CloudNine Explore Web interface. The top navigation bar includes 'Cases', 'Administration', and user icons. The main content area is titled 'OmegaJan20' and has tabs for 'DASHBOARD', 'FILTERS', 'SEARCH', 'EXPLORE', and 'REVIEW'. The 'SEARCH' tab is active, displaying a 'Search Request' table with 4 results. A red circle highlights the vertical bar between the search results and the document preview panel. The document preview panel shows a file named 'coffee\_aba\_national\_institute\_on\_class\_actions.ppt' with a result count of 1029 and a family count of 1029. The document content includes a list of authors and a title 'THE NEW CLASS ACTION LANDSCAPE: Trends and Developments in Class Certification ABA National Institute on Class Actions, October 25, 2012'.

ID	Search	Filter	Tags	Count	Size
1	FocusCust1			1,029	122.2
2	EmailFiles			3	0.9
3	Custodian D			39	8.7
4	Custodian A			1,029	122.2

To restore panels, double click on the vertical bar displayed on the far left or far right.



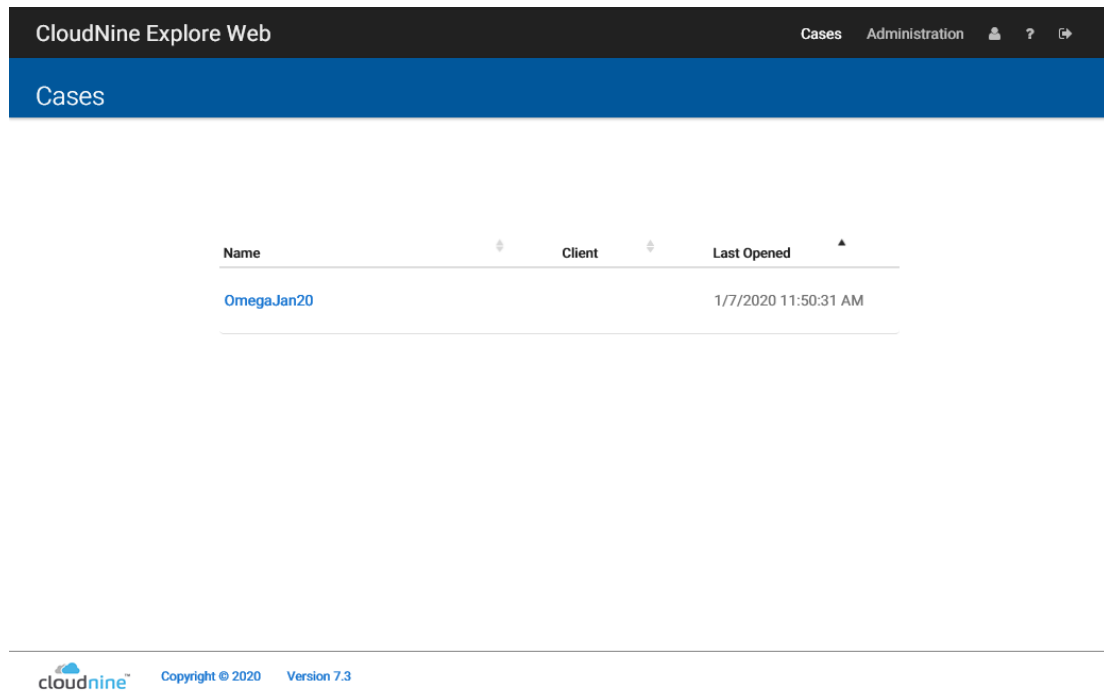
## Opening a Case

Cases for CloudNine™ Explore Web are started in CloudNine™ Explore. In CloudNine™ Explore, document stores are imported, indexed, and undergo other processing before being published to CloudNine™ Explore Web.

After opening CloudNine Explore Web in a web browser and logging in, the **Cases** page displays. Open a case by clicking on the **Name** in the list. The [Dashboard](#) for the selected case is displayed.



The list of cases shown depends on your role in CloudNine™ Explore Web. If you are an administrator, all CloudNine™ Explore Web cases are listed. For all other users, only those cases that have been assigned to you by an administrator are listed.



The screenshot shows the CloudNine Explore Web interface. At the top, there is a dark header with the text "CloudNine Explore Web" on the left and "Cases Administration" with a user icon, a question mark, and a refresh icon on the right. Below the header is a blue bar with the word "Cases". The main content area contains a table with the following data:

Name	Client	Last Opened
OmegaJan20		1/7/2020 11:50:31 AM

At the bottom of the interface, there is a footer with the CloudNine logo, "Copyright © 2020", and "Version 7.3".

## Tagging

There are four types of tagging in CloudNine™ Explore Web:

- **Individual tagging** - Document-level tags are manually applied to individual documents from the **Tagging** dialog box on the **Document Viewer** screen on the **Review** page.
- **Group tagging** - Group-level tags are applied to documents based on the group those documents belong to, such as a search query. With group tagging, the group tag is applied to all documents currently in the group. For example, if you apply a group tag to a search query, when you apply the tag, the group tag is applied to all documents currently returned in the search results. If documents are added to the case and there is a change to the search results, the group tag is automatically applied to any new documents in the search results. Group tags are applied from the **Group Tagging** dialog box.

- **Bulk tagging** - Individual document-level tags are applied to a group of documents at one time. Bulk tagging can be performed on email threads, near-duplicate documents, and search results on the **EXPLORE** tab. Because bulk tagging applies document-level tags instead of group tags, bulk tagging only applies tags to the documents in the group at the time the tag was applied. If documents are added to the case and any of the new documents belong to the email thread, near-duplicate set, or **EXPLORE** page search results, you will have to either re-apply the tag, or manually add the document-level tag to the new documents. Bulk tagging is done from the **Bulk Tagging** dialog box.
- **Edald tagging** - Document-level tags are applied to documents based on the Edald field value assigned to a document. Edald tagging allows you to quickly apply a tag to a large number of documents at one time. Edald tagging can be useful if documents are exported from CloudNine™ Explore for processing in another tool and you determine that a specific tag needs to be applied to some of the documents. With Edald tagging, you can import a line-delimited list of the Edald field values for the documents you want to tag and apply the tag. Tags are applied by Edald field in the **Tag Imported IDs** dialog box.

Note that tags can also be applied to individual files when reviewing documents on the **Review** page. The process for applying tags during a review differs from the standard way of applying individual tags in CloudNine™ Explore.

In CloudNine™ Explore, tags are added to a case, maintained, and exported on the **Tags** tab in the **New Case Settings** and **Edit Case Settings** dialog box. In CloudNine™ Explore Web, tags are added to a case, maintained, and exported on the **Tag Management** tab in the **Tagging**, **Group Tagging**, and **Bulk Tagging** dialog boxes.

A case's tag information is synchronized between CloudNine™ Explore and CloudNine™ Explore Web. When tags are added, edited, or deleted from CloudNine™ Explore or CloudNine™ Explore Web, the tag information is automatically updated for the case in the other application. For example, if you add a tag to a case in CloudNine™ Explore, the tag automatically appears for the case in CloudNine™ Explore Web. The same is true if the tag was added to CloudNine™ Explore Web. After the tag is added to CloudNine™ Explore Web, the tag automatically appears for the case in CloudNine™ Explore.

Remember that your access to features and functionality in CloudNine™ Explore Web is dependent on your role in the system.

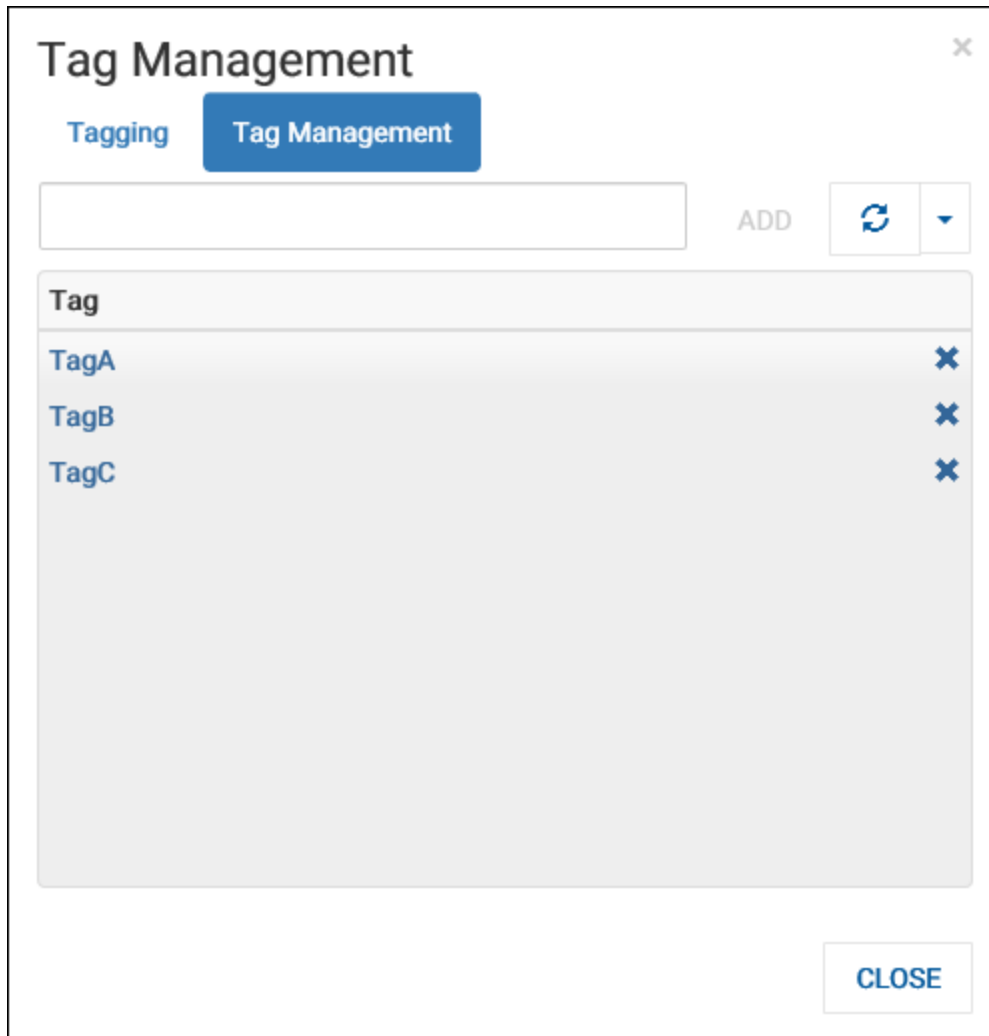


- **Read-only** users — Access to the **FILTERS**, **SEARCH**, and **EXPLORE** pages, but may not tag.
- **Standard access** users — Access to the **FILTERS**, **SEARCH**, and **EXPLORE** pages and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform.
- **Administrators** — Access to the **FILTERS**, **SEARCH**, and **EXPLORE** pages and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform and in the **Review** module.

#### *Adding, Deleting, Editing Tags*

## **Adding a Tag in CloudNine™ Explore Web**

1. Open the **Tagging**, **Group Tagging**, or **Bulk Tagging** dialog on the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case by selecting one of the tag icons.
2. Click the **Tag Management** tab.



3. Type the name of the tag you want to add in the edit box at the top.
4. Click the **ADD** button. The tag is added to the **Tag** list.
5. Click **CLOSE** to close the **Tagging**, **Group Tagging**, or **Bulk Tagging** dialog.



CloudNine™ Explore and CloudNine™ Explore Web do not support Unicode® characters in tag names.

## Deleting a Tag in CloudNine™ Explore Web



When you delete a tag that has been applied to documents, the tag is automatically removed from all documents when the tag is deleted. Tags deleted from a case in CloudNine™ Explore Web are automatically deleted from the case in CloudNine™ Explore. Tags can also be deleted from a case in CloudNine™ Explore. After tags are deleted from CloudNine™ Explore, they are automatically deleted from the case in CloudNine™ Explore Web.

1. Open the **Tagging, Group Tagging, or Bulk Tagging** dialog on the **FILTERS, SEARCH, or EXPLORE** page for a case by selecting one of the tag icons.
2. Click the **Tag Management** tab.
3. Click the **X** (delete) next to the tag you want to delete. The tag is deleted from the case. The tag is also automatically removed from any documents which previously had that tag.
4. Click **CLOSE** to close the **Tagging, Group Tagging, or Bulk Tagging** dialog.



Any tag assigned as the primary tag in a review cannot be deleted from CloudNine™ Explore Web or CloudNine™ Explore.

## Editing a Tag Name in CloudNine™ Explore Web

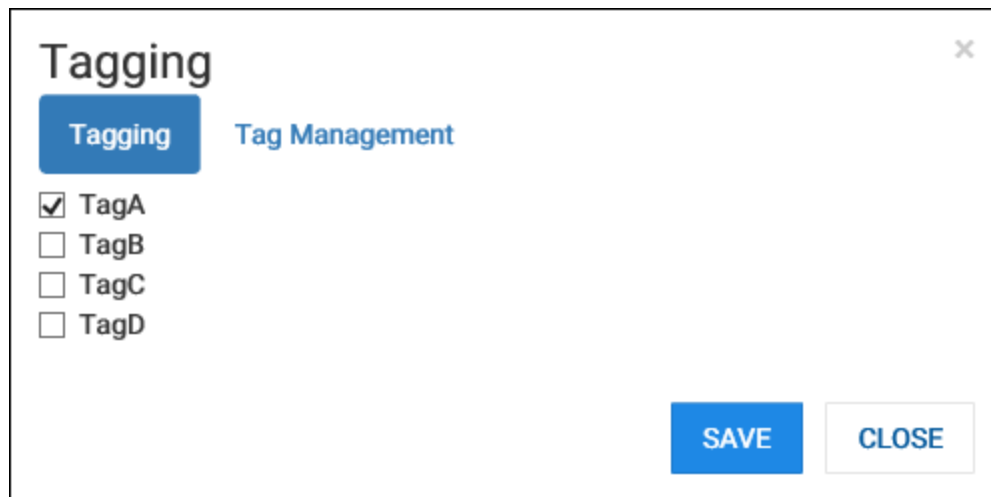
1. Open the **Tagging, Group Tagging, or Bulk Tagging** dialog on the **FILTERS, SEARCH, or EXPLORE** page for a case by selecting one of the tag icons.
2. Click the **Tag Management** tab.
3. In the **Tag** list, click the name of the tag you want edit. The tag name is displayed in the edit box at the top.
4. Modify the tag name.
5. Click **SAVE**. The updated tag name will be displayed in the **Tag** list.
6. Click **CLOSE** to close the **Tagging, Group Tagging, or Bulk Tagging** dialog box.

### Applying Tags

Remember that your access to features and functionality in CloudNine™ Explore Web is dependent on your role in the system.



- **Read-only users** — Access to the **FILTERS, SEARCH,** and **EXPLORE** pages, but may not tag.
- **Standard access users** — Access to the **FILTERS, SEARCH,** and **EXPLORE** pages and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform.
- **Administrators** — Access to the **FILTERS, SEARCH,** and **EXPLORE** pages and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform and in the Review module.



The screenshot shows a dialog box titled "Tagging" with a close button (X) in the top right corner. Below the title, there are two tabs: "Tagging" (which is selected and highlighted in blue) and "Tag Management". Under the "Tagging" tab, there is a list of four tags: "TagA" (checked with a blue checkmark), "TagB", "TagC", and "TagD" (all unchecked). At the bottom right of the dialog, there are two buttons: "SAVE" (a blue button) and "CLOSE" (a white button with a blue border).

## Applying Tags to Individual Documents on the FILTERS, SEARCH, or EXPLORE Pages

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. Display a list of documents by selecting a filter on the **FILTERS** page, running a search query on the **SEARCH** page, or exploring using available criteria on the **EXPLORE** page.
2. Select a document from the document list pane.
3. In the document pane on the right, click the **Tag document** icon at the top. The **Tagging** dialog displays. Tags that are already applied to the individual document are checked.
4. Select the check box next to the tag(s) you want to apply to the document.
5. Click **SAVE**. The **Tagging** dialog closes.



The Tag document icon at the top of the document details pane on the right will display in gray color if the document does not have any applied tags, or blue color if the document has at least one applied tag.

## Applying Tags to Search Query Results

Starting from the **SEARCH** page for a case:

1. Select the check box next to the search query containing the records you want to tag.
2. Click the **Tag checked searches** icon at the top of the **Search Request** pane. The **Group Tagging** dialog displays.
3. Select the check box next to the tag(s) you want to apply to all documents in the search query.
4. Click **SAVE**. The **Group Tagging** dialog closes.

5. The **Search Request** pane is updated and the search list displays a **Tag** icon in the **Tags** column indicating that this search has a tag applied.



If additional records are imported into the case, and some of the new records are returned in the tagged search query results, the tag is automatically applied to those newly imported records.

## Applying Tags to EXPLORE Search Results

Starting from the **EXPLORE** page for a case:

1. In the Selected criteria pane, configure the search you want to use to locate the documents you want to tag. You can type in search terms, enter a date filter, or filter using the filters listed at the bottom.
2. Click **GO!** The search is executed and the search results display in the document list in the center pane.
3. Click the **Tag documents** icon at the top of the document list pane. The **Bulk Tagging** dialog displays. The total number of documents in the current document list is shown at the bottom of the **Bulk Tagging** dialog.

4. Select the **Apply** option for the tag(s) you want to apply to the document list.
5. Click **SAVE**. The **Bulk Tagging** dialog closes. The tag(s) are applied to each document in the document list.



Because searches on the **EXPLORE** page can return large sets of documents, to prevent bogging down performance on the page calculating the current tag state of each document returned in the search results, each time you open the **Bulk Tagging** dialog box on the **EXPLORE** page, the **No Change** option is selected for all tags listed in the dialog box, even if a bulk tag has been applied to one or more documents in the current search results during a previous session on the **EXPLORE** page. When the document-level tags are applied to the search results on the **EXPLORE** page, the tags applied to each document in the search results are saved, but the bulk tagging options associated with a search on the **EXPLORE** page are not retained.

## Applying Tags to Documents in the Email Thread Viewer

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. Display a list of documents by selecting a filter on the **FILTERS** page, running a search query on the **SEARCH** page, or exploring using available criteria on the **EXPLORE** page.
2. Select a document from the document list pane in the center. The document details display in the right pane.

The screenshot shows the CloudNine Explore Web interface. The top navigation bar includes 'Cases', 'Administration', and user icons. The main header displays 'OmegaJan20' and navigation tabs for 'DASHBOARD', 'FILTERS', 'SEARCH', 'EXPLORE', and 'REVIEW'. The 'SEARCH' tab is active.

The interface is divided into three main panes:

- Search Request:** Shows a list of search results. The third result, 'Custodian D', is selected.
- Custodian D:** Displays document details including 'Result Count: 39', 'Family Count: 39', and a snippet of a news article from kinston.com. Below this, a 'zip' attachment is listed with its sender and recipient information.
- Document Details:** Shows the 'zip' attachment with a 'View email thread' icon circled in red. Below the icon, it indicates 'Last Viewed: 1/8/2020 9:02 AM' and '0 of 2' threads. The email header shows the sender as 'Venkatraj, Vishnu Priya (Cognizant)' and the recipient as 'C, Nivetha (Cognizant)'. The attachment is 'FW office attachments.zip'.

At the bottom, the footer includes the CloudNine logo, 'Copyright © 2020 Version 7.3', and 'Work Status: Idle'.

3. Click the **View email thread** icon at the top of the document details pane on the right. The **Email Thread Viewer** dialog displays.



If the **View email thread** icon is disabled, there are no email threads associated with the file or the email thread analysis has not been run yet for the case.

The screenshot displays the 'Email Thread Viewer' window. On the left, a list of 'Email Thread Items' includes an email from Venkatraj, Vishnu Priya (Co... zip) dated 11/11/2016, and several attachments: '> FW: office attachments.zip', '> Venkatraj, Vishnu Priya (... FW: office attachm... 11/11/2016', '> Doc with Images.doc', '> Gray Letter-18.tif', and '> Gif Sample.GIF'. Red circles highlight the 'Tags' icon at the top of the list and the 'Tag' icon next to the 'Doc with Images.doc' attachment. A red arrow points from the text 'Bulk Tagging' to the top 'Tags' icon, and another red arrow points from 'Document Tagging' to the 'Tag' icon next to the document. Below the list, a metadata panel for 'Doc with Images.doc' shows details like Custodian, Type (MS Word 97-2003 Document (OLE)), Size (3.69 MB), and Created/Modified dates. On the right, the document content is displayed, starting with 'Doc with Images.doc' and a download icon, followed by a survey invitation from the Louisiana Center for the Blind. Below the text are form fields for Name, Address, Phone No., and E-mail address.

4. Click the **Tags** icon at the top of the **Email Thread Items** list to open the **Bulk Tagging** dialog to apply a tag to all documents in the email thread, or click the **Tag** icon next to an individual document to open the document **Tagging** dialog.
5. Select the check box next to the tag(s) you want to apply to the document(s).
6. Click **SAVE**. The **Bulk Tagging** or **Tagging** dialog closes.



When performing bulk tagging of all records in an email thread, if additional records are imported into the case and some of the new records are part of the email thread, the tag is not automatically applied to the newly imported documents in the email thread. To apply the tag to the newly imported documents, you will need to reapply the tag to the entire email thread, or apply the tag individually to the newly imported documents in the email thread.

## Applying Tags to Documents in the Near Duplicate Document Viewer

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. Display a list of documents by selecting a filter on the **FILTERS** page, running a search query on the **SEARCH** page, or exploring using available criteria on the **EXPLORE** page.
2. Select a document from the document list pane in the center. The document details display in the right pane.

The screenshot shows the CloudNine Explore Web interface. The top navigation bar includes 'Cases', 'Administration', and user icons. The main header displays 'OmegaJan20' and navigation tabs for 'DASHBOARD', 'FILTERS', 'SEARCH', 'EXPLORE', and 'REVIEW'. The 'EXPLORE' tab is active.

On the left, the 'Selected criteria' section shows search filters: 'Search Term', '1/1/1980 to 2/12/2019', and 'Include items without dates'. A list of filters like 'Custodians', 'Sources', 'Import Sessions', 'Saved Searches', and 'Exports' is visible.

The center pane shows 'Total Documents: 5047' and a list of documents. The selected document is 'Facts u may not know...'. Its details include:
 

- From: Senthilkumar N <se...>
- Sent: 6/17/2009 12:29 PM...
- To: Undisclosed-Recipient;
- Subject: Facts u may not know...

The right pane shows the document details for 'Facts u may not know...'. It includes a 'View near duplicates' icon (a document with a magnifying glass) circled in red. Below the details is a table with tabs for 'Email Thread (2)', 'Near Dupes (1)', 'Duplicates (1)', and 'More Metadata'. The table shows two entries for the subject 'Facts u may not know...' from Senthilkumar N <sent...> on 6/17/2009.

At the bottom, the footer shows 'cloudnine™ Copyright © 2020 Version 7.3' and 'Work Status: Idle'.

3. Click the **View near duplicates** icon at the top of the document details pane on the right. The **Near Duplicate Document Viewer** dialog displays.



If the **View near duplicates** icon is disabled, there are no duplicates associated with the file or the near-duplicate detection analysis has not been run yet for the case.



**Near Duplicate Document Viewer** Bulk Tagging

Name	Similarity	Compare
Facts u may...	-	
Facts u may...	100	

**Document Tagging**

Facts u may not know... Last Viewed: 1/8/2020 11:01 AM

Senthilkumar N <senthilkumar.n@anishait.com>  
 Sent: 6/17/2009 12:29 PM (UTC) Coordinated Universal Time  
 To: Undisclosed-Recipient:  
 Things You May Not Know.....

**Facts u may not k...**

Filename: Facts u may not know .msg  
 Sent: 6/17/2009 12:29 PM (UTC) Coordinated Universal Time  
 Custodian: Custodian A  
 Type: MS Outlook Message  
 Size: 30.50 KB  
 Msg Class: IPM.NOTE

1. Coca-Cola was originally green.
2. The most common name in the world is Mohammed.
3. The name of all the continents ends with the same letter that they start with.
4. The strongest muscle in the body is the tongue.
5. There are two credit cards for every person in the United States.
6. TYPEWRITER is the longest word that can be made using the letters only on one row of the keyboard.
7. Women blink nearly twice as much as men!
8. You can't kill yourself by holding your breath.

4. Click the **Tags** icon at the top of the document list to open the **Bulk Tagging** dialog to apply a tag to all documents in the list, or click the **Tag** icon next to an individual document to open the document **Tagging** dialog.
5. Select the check box next to the tag(s) you want to apply to the document(s).
6. Click **SAVE**. The **Bulk Tagging** or **Tagging** dialog closes.

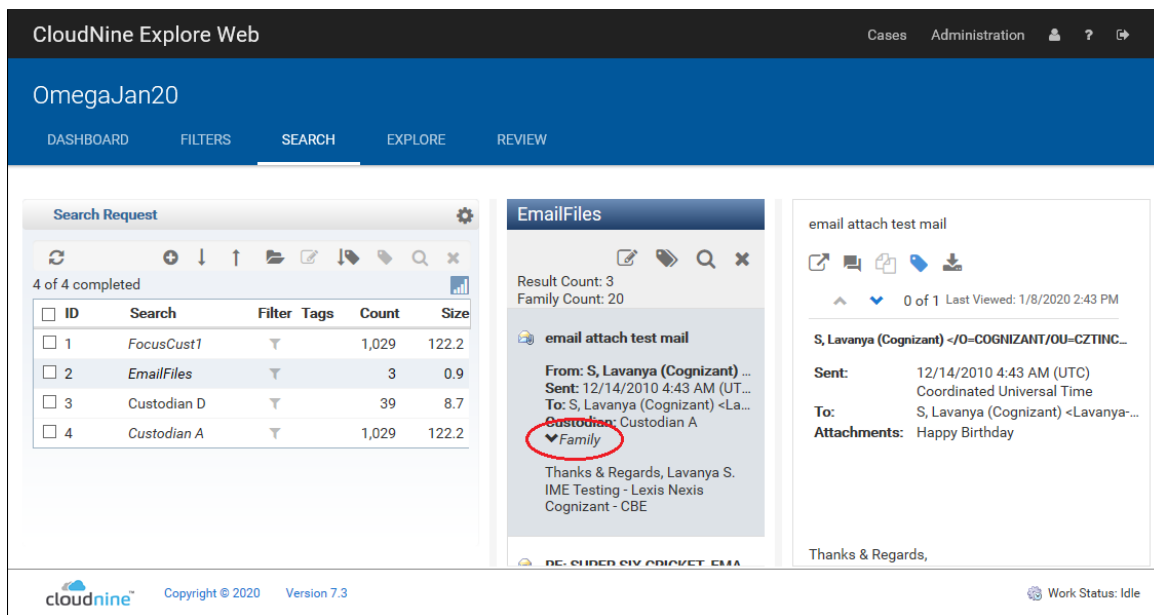


When performing bulk tagging of a set of near-duplicate documents, if additional records are imported into the case and some of the new records are part of the set of near-duplicate documents, the tag is not automatically applied to the newly imported documents. To apply the tag to the newly imported documents, you will need to reapply the tag to the entire near-duplicate set, or apply the tag individually to the newly imported documents.

## Applying Tags to Documents in a Family

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. Display a list of documents by selecting a filter on the **FILTERS** page, running a search query on the **SEARCH** page, or exploring using available criteria on the **EXPLORE** page.
2. Scroll to a document in the document list in the center pane that is part of a family (you will see a **Family** drop-down in the document list).



3. Click on the Family drop-down to expand the list of documents within the family. Select an individual document within the family. The document details display in the right pane.

The screenshot shows the CloudNine Explore Web interface. At the top, there's a navigation bar with 'Cases', 'Administration', and user icons. Below that, the case name 'OmegaJan20' is displayed. The main area is divided into three panes:

- Search Request:** A table showing search results. The table has columns for ID, Search, Filter, Tags, Count, and Size. There are 4 of 4 completed searches.
 

ID	Search	Filter	Tags	Count	Size
1	FocusCust1	Y		1,029	122.2
2	EmailFiles	Y		3	0.9
3	Custodian D	Y		39	8.7
4	Custodian A	Y		1,029	122.2
- EmailFiles:** Shows details for an email attachment named 'email attach test mail'. It includes fields for From, Sent, To, and Custodian. A red arrow points to the 'Happy Birthday' tag icon in the document details pane.
- Happy Birthday:** Shows the document details for 'Happy Birthday'. It includes the sender 'CBE, HR TEAM (Cognizant) <HRTEAM.CBE@cognizant.c...>', the sent date '12/13/2010 6:31 PM (UTC)', and several attachments including 'ATT2606697.dat' and 'ATT2606698.da...'. A red circle highlights the 'Happy Birthday' tag icon at the top of this pane.

At the bottom of the interface, there's a footer with 'cloudnine Copyright © 2020 Version 7.3' and 'Work Status: Idle'.

4. Click the **Tag** document icon at the top of the document details pane to open the **Tagging** dialog.
5. Select the check box next to the tag(s) you want to apply to the document.
6. Click **SAVE**. The **Tagging** dialog closes.

## Applying Tags by Edald

Every document imported into a case in CloudNine™ Explore is assigned a unique value in the case's Edald field. When documents are exported from CloudNine Explore using the native export, by default, the export includes the Edald field value for each document exported from CloudNine Explore.

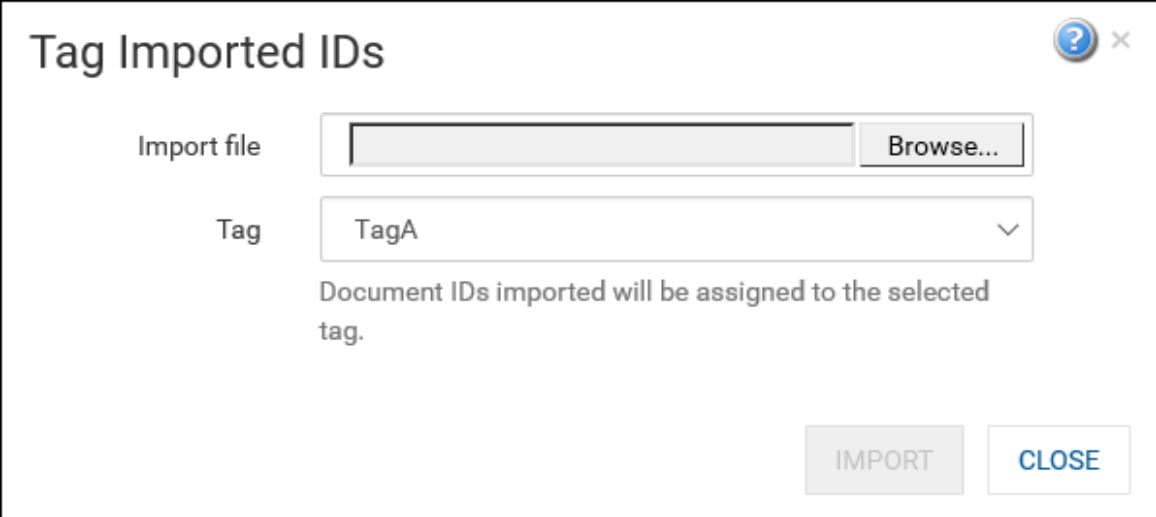
When adding tags by Edald, you can only add one tag to a list of Edalds at one time. If you want to add multiple tags to the same list of Edalds, you can import the same Edald list multiple times, choosing a different tag each time.

Adding Tags by Edald does not remove any tags that already exist for the associated documents. For example, if a document already has the Privileged tag applied, and the document is included in the Edald list used to apply the

Responsive tag, after applying tags by Edald the document will have both the Privileged and Responsive tags.

Tags applied using Edald tagging are applied as individual document-level tags. If you need to remove a tag that was applied using Edald tagging, the tag can be removed from a document on the Tagging tab in the Tagging dialog box. For more information, see [Removing Tags](#).

1. Create a line-delimited text file containing the Edald value for every document you want to tag. The line-delimited text file can contain up to 50,000 Edald values. If the import encounters a duplicate Edald field value in the text file, it will ignore the duplicate values.
2. Verify that the tag you want to use already exists in the Explore case.
3. Go to the **SEARCH** page for the case.
4. In the **Search Request** pane, click the **Tag Imported IDs** icon. The **Tag Imported IDs** dialog displays.



The screenshot shows a dialog box titled "Tag Imported IDs". It features a "Import file" label next to a text input field and a "Browse..." button. Below this is a "Tag" label next to a dropdown menu currently showing "TagA". A message states: "Document IDs imported will be assigned to the selected tag." At the bottom right, there are two buttons: "IMPORT" and "CLOSE".

5. Click **Browse** and use the presented file explorer window to select the file you created in step 1.
6. Use the **Tag** drop down to select the tag you want to apply to the documents you specified in the file.
7. Click **IMPORT**. The tag you selected is applied to each document associated with a valid Edald value from the text file. The **Tag Imported IDs** dialog

displays a message indicating how many IDs were imported and what tag was used. If there were duplicate or invalid EdalD values in the text file, the message will also provide those details.

8. Click **CLOSE**. The **Tag Imported IDs** dialog closes.

### Removing Tags

Remember that your access to features and functionality in CloudNine™ Explore Web is dependent on your role in the system.



- **Read-only users** — Access to the **FILTERS**, **SEARCH**, and **EXPLORE** pages, but may not tag.
- **Standard access users** — Access to the **FILTERS**, **SEARCH**, and **EXPLORE** pages and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform.
- **Administrators** — Access to the **FILTERS**, **SEARCH**, and **EXPLORE** pages and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform and in the Review module.

## Removing Tags from Individual Documents

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. In the document pane on the right, click the **Tag document** icon at the top. The **Tagging** dialog displays. Tags that are already applied to the individual document are checked.
2. Clear the check box next to the tag(s) you want to apply to remove from the document.
3. Click **SAVE**. The **Tagging** dialog closes.

## Removing a Group Tag from a Search Query

Starting from the **SEARCH** page for a case:

1. Select the check box next to the search query containing the records you want to remove tag(s) from.
2. Click the **Tag checked searches** icon at the top of the **Search Request** pane. The **Group Tagging** dialog displays.
3. Clear the check box next to the tag(s) you want to remove from all documents in the search query.
4. Click **SAVE**. The **Group Tagging** dialog closes.
5. The **Search Request** pane is updated and the search list displays a **Tag** icon in the **Tags** column if this search has any remaining tags.

If a tag is applied to a document individually and then the same tag applied to the same document as part of a group, when the group tag is removed the individual tag will continue to be applied to the document.

For example:



- Apply TagA to Document1 individually
- Apply TagA to result list for Search1 (which contains Document1)
- Remove TagA from Search1 result list

At this point, Document1 still has TagA applied

## Removing Tags from EXPLORE Search Results

Starting from the **EXPLORE** page for a case:

1. In the Selected criteria pane, configure the search you want to use to locate the documents you want to remove tags from. You can type in search terms, enter a date filter, or filter using the filters listed at the bottom.
2. Click **GO!** The search is executed and the search results display in the document list in the center pane.
3. Click the **Tag documents** icon at the top of the document list pane. The **Bulk Tagging** dialog displays. The total number of documents in the current document list is shown at the bottom of the **Bulk Tagging** dialog.
4. Select the **Remove** option for the tag(s) you want to remove from the documents in the document list.
5. Click **SAVE**. The **Bulk Tagging** dialog closes. The tag(s) are removed from each document in the document list.



Because searches on the **EXPLORE** page can return large sets of documents, to prevent bogging down performance on the page calculating the current tag state of each document returned in the search results, each time you open the **Bulk Tagging** dialog box on the **EXPLORE** page, the **No Change** option is selected for all tags listed in the dialog box, even if a bulk tag has been applied to one or more documents in the current search results during a previous session on the **EXPLORE** page. When the document-level tags are applied to the search results on the **EXPLORE** page, the tags applied to each document in the search results are saved, but the bulk tagging options associated with a search on the **EXPLORE** page are not retained.

## Removing Bulk Tags from Email Threads

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. Display a list of documents by selecting a filter on the **FILTERS** page, running a search query on the **SEARCH** page, or exploring using available criteria on the **EXPLORE** page.
2. Select a document from the document list that is associated with the email thread you want to remove tags from. The document details display in the right pane.
3. Click the **View email thread** icon at the top of the document details pane on the right. The **Email Thread Viewer** dialog displays.
4. Click the **Tags** icon at the top of the **Email Thread Items** list to open the **Bulk Tagging** dialog.
5. Clear the check box next to the tag(s) you want to remove from the documents in the email thread.
6. Click **SAVE**. The **Bulk Tagging** dialog closes and the document tags are updated.

## Removing Bulk Tags from Near Duplicates

Starting from the **FILTERS**, **SEARCH**, or **EXPLORE** page for a case:

1. Display a list of documents by selecting a filter on the **FILTERS** page, running a search query on the **SEARCH** page, or exploring using available criteria on the **EXPLORE** page.
2. Select a document from the document list that is associated with the near duplicate list you want to remove tags from. The document details display in the right pane.
3. Click the **View near duplicates** icon at the top of the document details pane on the right. The **Near Duplicate Document Viewer** dialog displays.
4. Click the **Tags** icon at the top of the document list to open the **Bulk Tagging** dialog



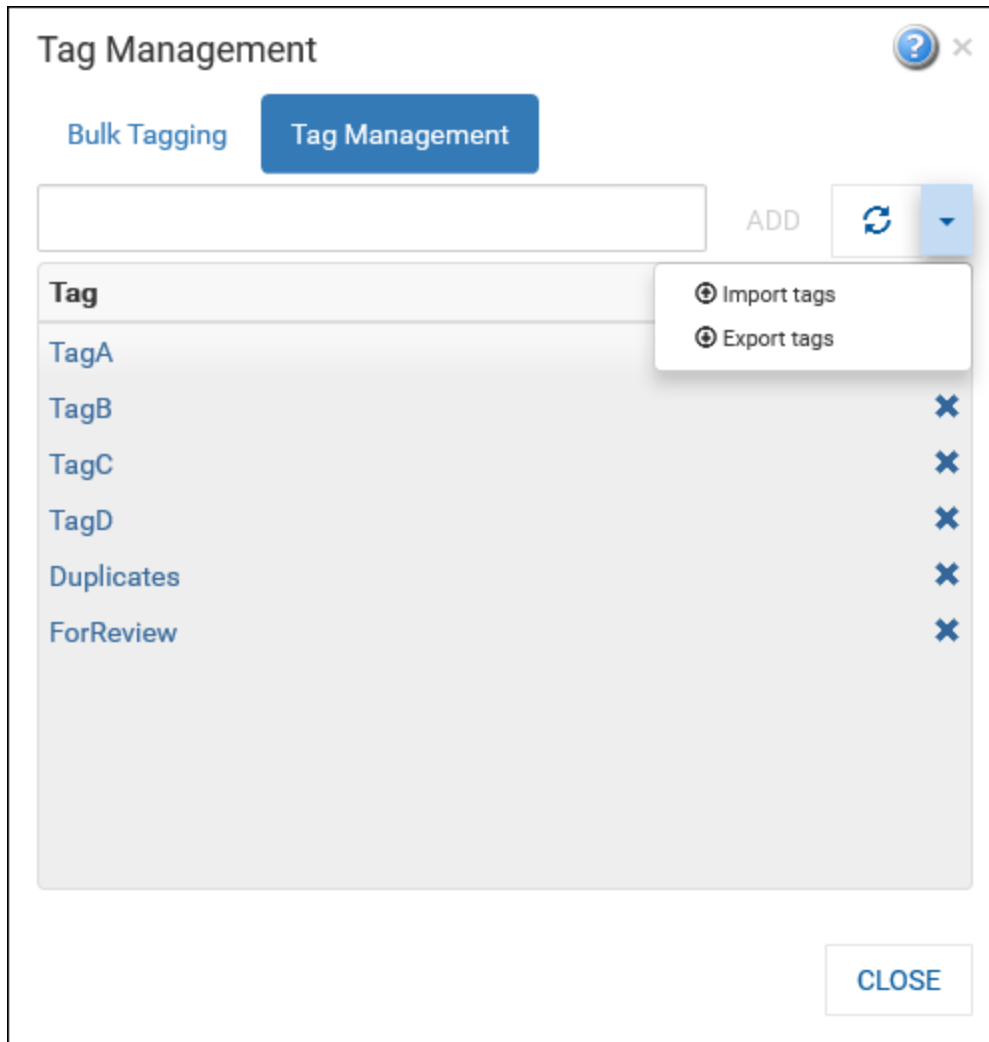
5. Clear the check box next to the tag(s) you want to remove from the documents in the near duplicate set.
6. Click **SAVE**. The **Bulk Tagging** dialog closes and the document tags are updated.

### ***Importing and Exporting Tags***

Tags can be imported into a case in CloudNine™ Explore Web from **Tag Management** in the **Tagging**, **Group Tagging**, or **Bulk Tagging** dialogs by providing a line-delimited text file with a list of one or more tag names. Tags associated with a case can also be exported to a line-delimited .txt file from **Tag Management**. Exported tags can be imported into other cases.

Tags for a case exist in both CloudNine™ Explore Web and CloudNine™ Explore. When tags are added to a case in either Explore Web or Explore, they are automatically added to the same case in the other application.

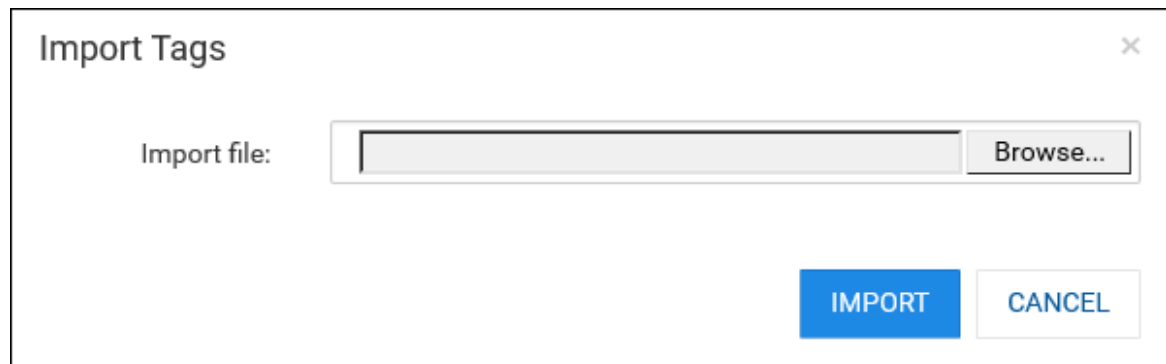
Tags can also be exported from CloudNine™ Explore to CloudNine™ LAW. Tags are automatically exported to and created in LAW when a file containing tags is exported from Explore to LAW.



## Importing Tags into Explore Web

Starting from **Tag Management** on the **Tagging**, **Group Tagging**, or **Bulk Tagging** dialog:

1. Click the down arrow next to the **Refresh** button to display the menu.
2. Select **Import tags**. The **Import Tags** dialog displays.



3. Click **Browse** and use the presented file explorer window to select the file containing the tags to import into the current case.
4. Click **IMPORT**. the **Import Tags** dialog closes and the tags from the file are imported. The **Tag Management** dialog displays a message indicating how many tags were imported.
5. Click **CLOSE**. The Tag **Management** dialog closes.

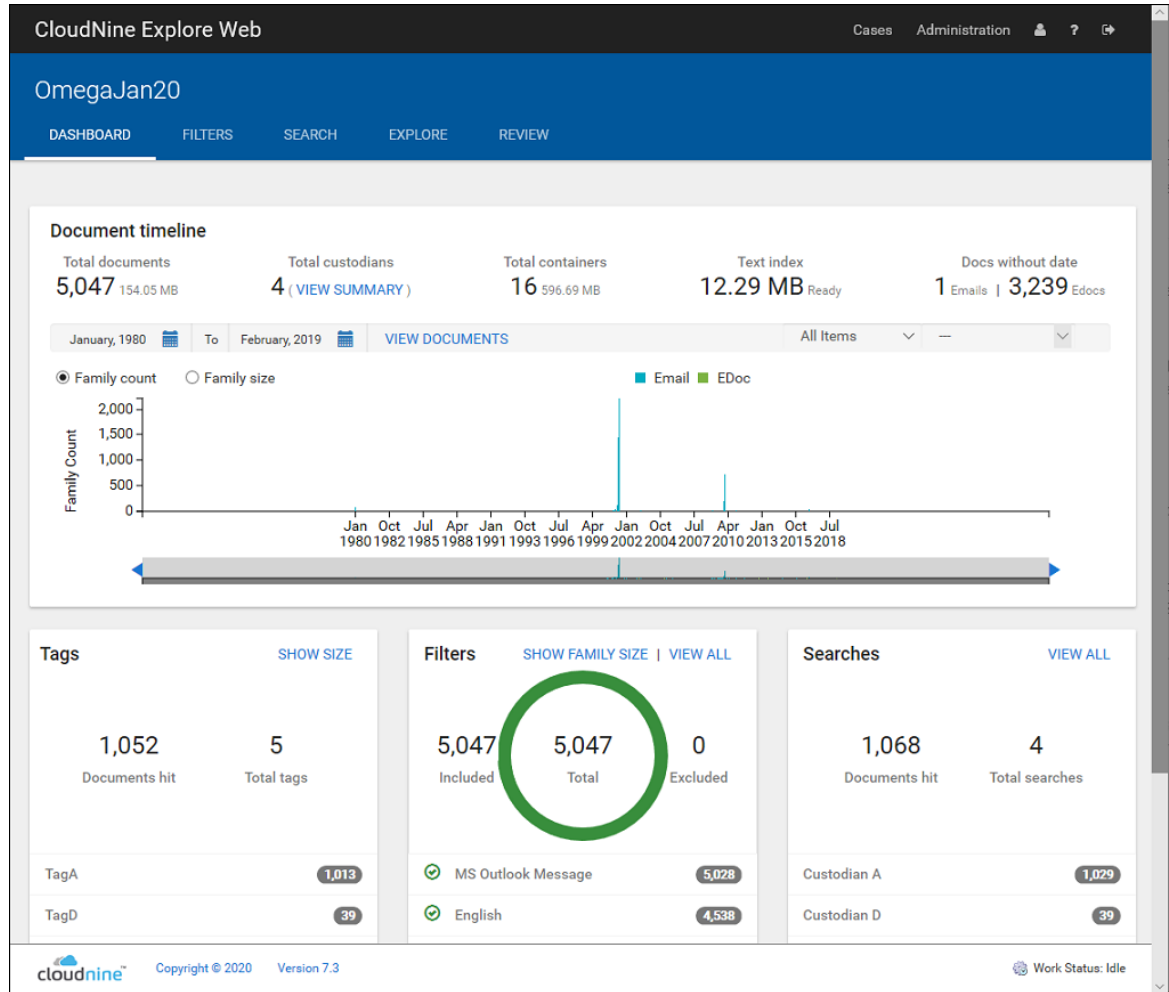
## Exporting Tags

Starting from **Tag Management** on the **Tagging**, **Group Tagging**, or **Bulk Tagging** dialog:

1. Click the down arrow next to the **Refresh** button to display the menu.
2. Select **Export tags**. A line-delimited *exported-tags.txt* file is created containing a list of all tags defined for the current case.
3. Depending on your browser, options will be displayed to allow you to **Open** or **Save** the file as needed.

## Dashboard

The Case Dashboard provides a summary of case metrics and other information for the case currently opened in CloudNine™ Explore Web. Case information is available for the review team on the DASHBOARD tab for a case.



The dashboard is organized into 4 main sections: **Document timeline**, **Tags**, **Filters**, and **Searches**, which are described in more detail in the following sections. For all dashboard data displays, any **Family Count** or **Family Size** values are calculated based on parent size plus attachment size, not including containers.

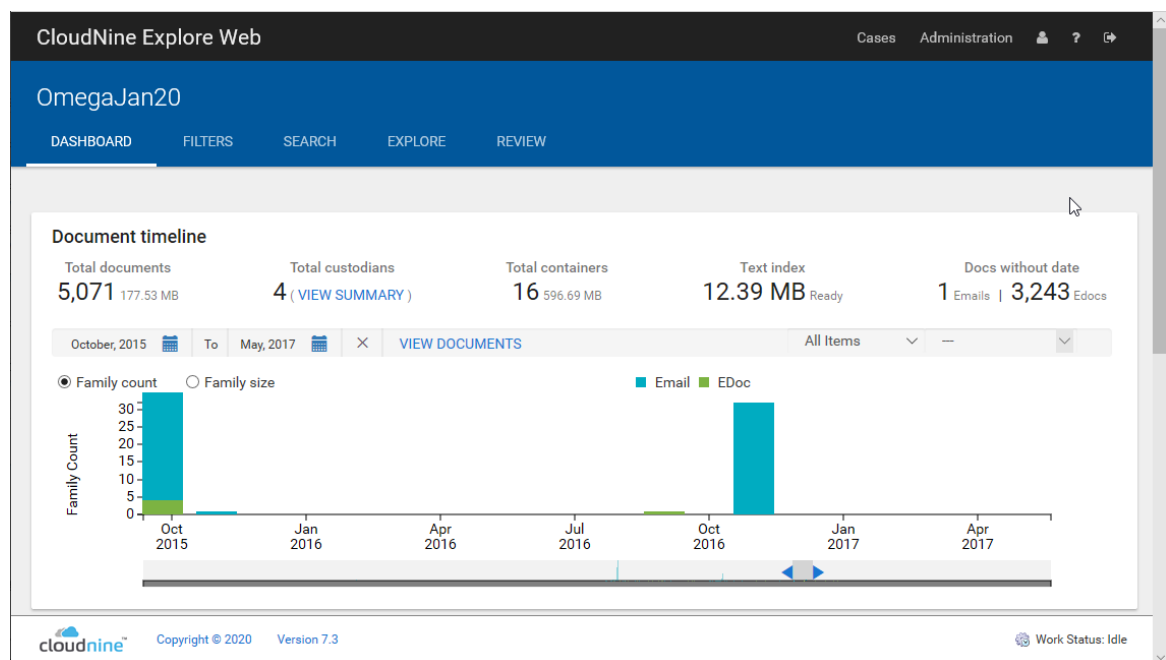
<b>D a s h b o a r d a r e a</b>	<b>Information available</b>
<b>D o c u m e n t t i m e l i n e</b>	<p>Total number of documents</p> <p>Total size of all documents</p> <p>Number of custodians</p> <p>Link to a list of custodians, and the number of sources and documents for each</p> <p>Number of containers</p> <p>Total size of containers</p> <p>Size and state of readiness of the case index</p> <p>Number and total size of all documents without date information</p> <p>Graph displaying Family count</p>
	<p>or Family size for Email and EDoc content by date</p>

### Dashboard Timeline

The top of the **DASHBOARD** page displays a **Document timeline**. In the **Document timeline**, you can see trends in the number and volume of electronic documents and email over time. The date range is represented in monthly increments. Documents in the timeline are color coded: emails are blue, and edocs (all non-email documents) are green.



Mail store files (e.g., .pst,.nsf), archive files (e.g., .zip), and forensic images (e.g., .E01, DD/RAW) files are not included in the **Document timeline** results.



## Adjusting the Document Timeline Display

There are three methods to modify the display of the **Document timeline**:

1. Select Date Range to Display on the Calendar

- i. Click on the Calendar icon next to the start or end month displayed above the timeline graph. In the displayed calendar, select the month and year you want. Then click any day in the month to close the calendar and display the updated range of data on the **Document timeline**. Only month and year values (not day) are used to generate data for the **Document timeline**.
2. Adjust the Slider to Magnify Display Within the Date Range
  - i. You can click and drag the arrow on the left and/or right end of the slider bar below the **Document timeline** to adjust the zoom. You can also click and drag the gray bar between the arrows to adjust the section of the timeline that you want to magnify.
3. Click and Drag Using the Mouse to Magnify Display Within the Date Range
  - i. Click and drag your mouse over an area displayed on the **Document timeline** to set the area you want to magnify.

## View Document Details

Click the **VIEW DOCUMENTS** link to open the **EXPLORE** page populated with the data from the current date range displayed in the **Document timeline**. If a custodian or import session is selected, they will also be automatically selected on the **EXPLORE** page.

## View Details for a Specific Month

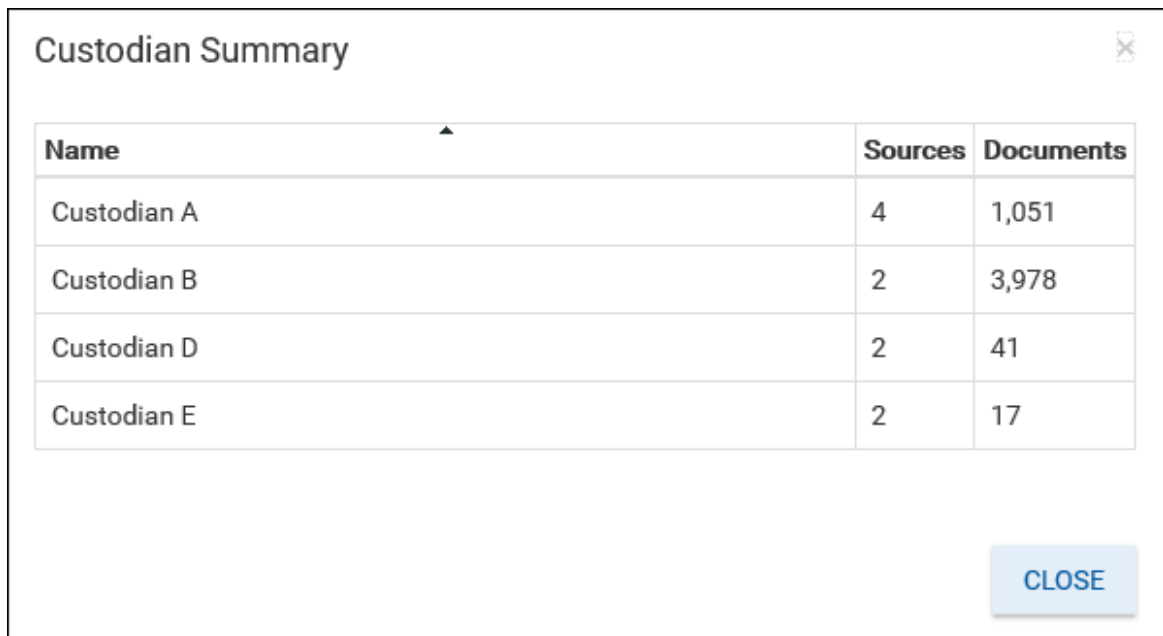
Hover over the bar for a month and CloudNine™ Explore Web provides:

- Number of **Email** documents in the month
- Number of **Edocs** in the month

- A **VIEW DOCUMENTS** link that takes you to the EXPLORE page to view the documents associated with the timeline month.

## View Custodians

Click the **VIEW SUMMARY** link in the **Total custodians** section at the top to see the **Custodian Summary** dialog. The dialog lists the custodians associated with the document set along with source and document counts for each.



Name	Sources	Documents
Custodian A	4	1,051
Custodian B	2	3,978
Custodian D	2	41
Custodian E	2	17

## Update Timeline Graph by Custodian or Import Session

The **Document timeline** by default will display all documents for the date range chosen, regardless of custodian or import session. To the right of the **VIEW DOCUMENTS** link is a drop down. Select **Custodian** in the drop down to display a list of custodians in the right-most drop down. Select **Import Session** in the drop down to display a list of import sessions in the right-most drop down. You can then select the specific custodian or import set that you want to display in the timeline graph.





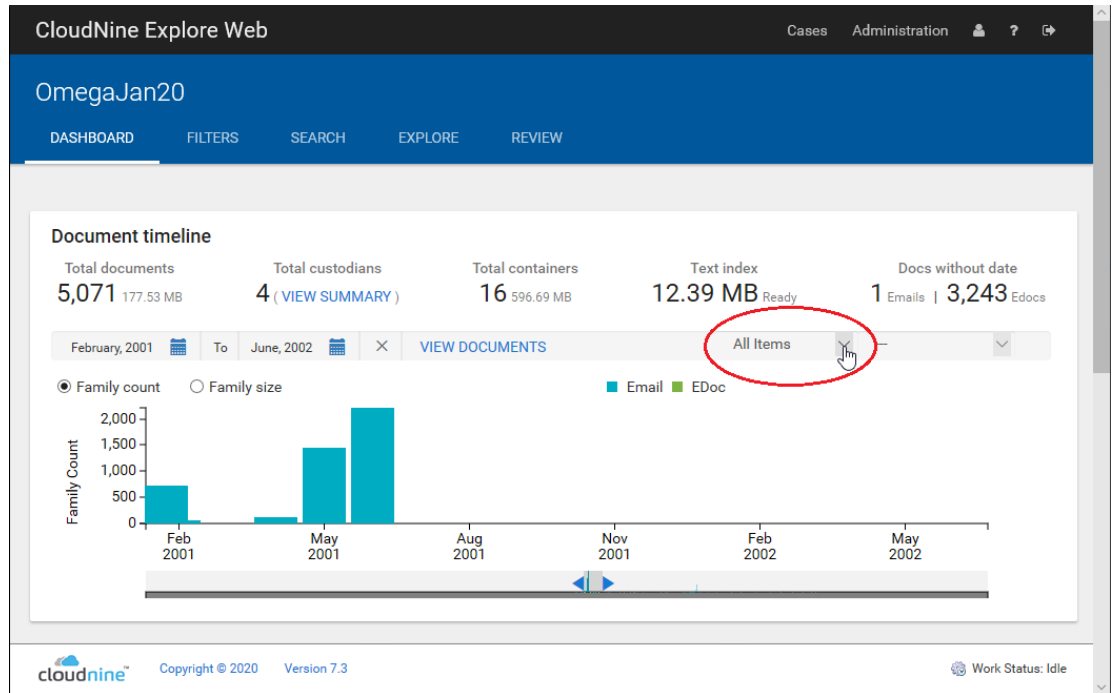
Modifying the date range, or selecting a specific custodian or import session only impacts the data shown in the graph. The totals displayed at the top of the **Document timeline** pane always reflect all data in the case.

You may notice a difference between the document counts displayed in the **Document timeline** and the document counts displayed on the **EXPLORE** page.



The **Document timeline** calculates document counts using all case documents, and is not restricted to documents remaining after filters are applied. In addition, documents in a case have multiple dates from the family it belongs to, a lower date and an upper date. To ensure that documents only show up once in the **Document timeline**, only one date is used for the family—the `DateFilterUpperBound` field.

The **EXPLORE** page calculates documents using only the documents remaining after filters have been applied to the case. For date calculations, it uses the date range from both the `DateFilterUpperBound` field and `DateFilterLowerBound` field to determine the overlap of a document's date range with the date range used to filter.



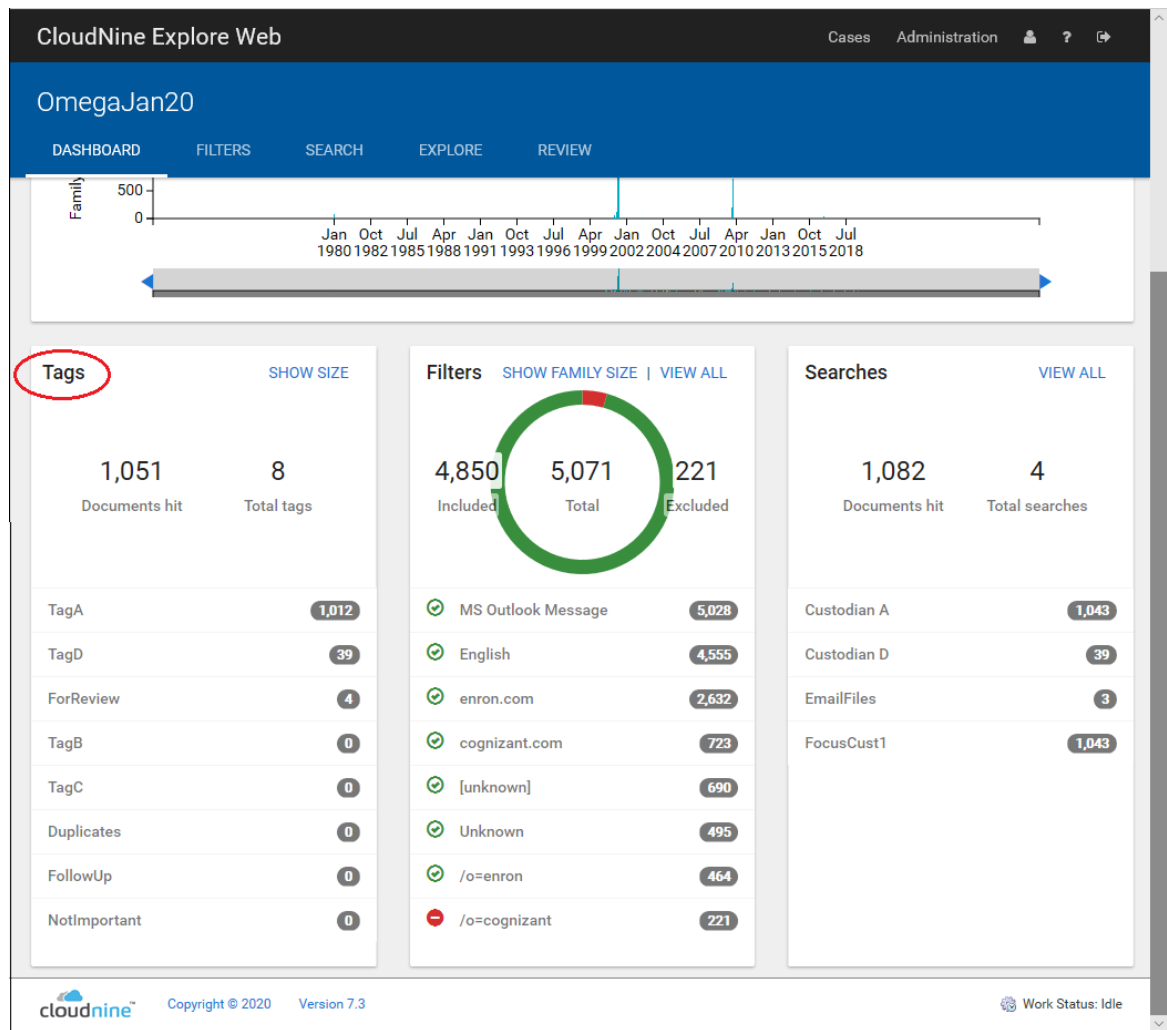
### Dashboard Tags

The bottom left of the **DASHBOARD** page displays a **Tags** pane. This section provides a central location to view information about tags used in the case. Specifically, it displays tag count or tag size information for the top eight tags used in the case. Toggle between displaying count or size using the link in the upper-right corner of the **Tags** pane.

The top of the **Tags** pane displays the number (or size) of documents with at least one tag, and also the total number of tags for the case.



All tag information is prefilter. If a tagged document is excluded by a filter, Explore Web still counts it as tagged and includes it in the count and size details displayed on the Tags pane.

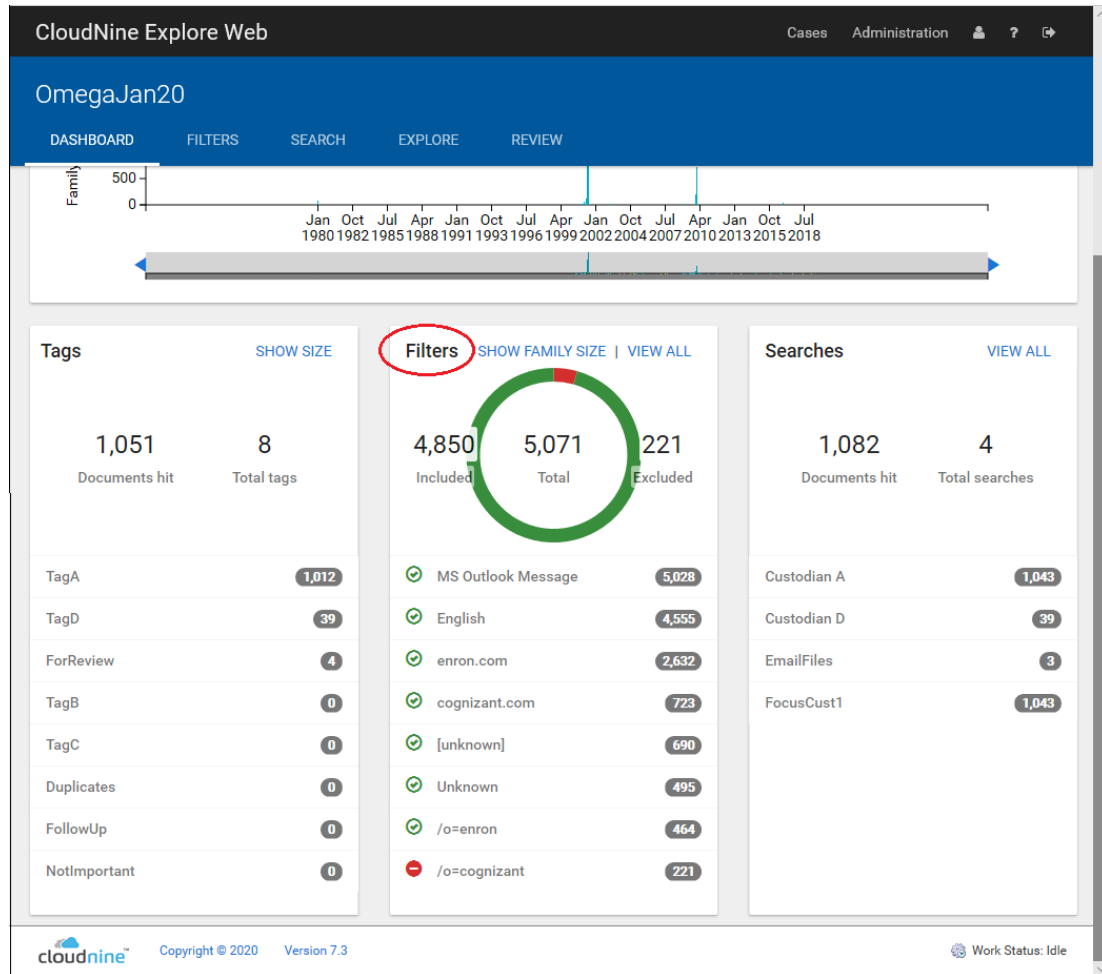


**Dashboard Filters**




The bottom center of the **DASHBOARD** page displays a **Filters** pane. This section displays family count and family size information for the top eight filters in the case. Toggle between displaying count or size details using the link at the top of the **Filters** pane. Click an individual filter from the list to view the documents associated with that filter on the **FILTERS** page.

The top of the **Filters** pane displays the count (or size) of all **Included** filtered documents, the count (or size) of all **Excluded** filtered documents, and the count (or size) of all **Total** combined filtered documents.

Click the **VIEW ALL** link at the top right of the **Filters** pane to go to the **FILTERS** page.



Each filter in the list has an icon providing more details:

Filter Decision Icon Key		
Icon	Name	Description
	Included	The Inc. check box is selected for filter on the FILTERS dashboard.
	Implicitly Included	<p>The Inc. and Exc. check boxes are not selected for the filter on the FILTERS dashboard.</p> <p>When both the Inc. and Exc. check boxes are not selected for a filter, the filter is automatically included in the filter results, but the filter is designated as "Not Decided".</p>
	Excluded	The Exc. check box is selected for the filter on the FILTERS dashboard.

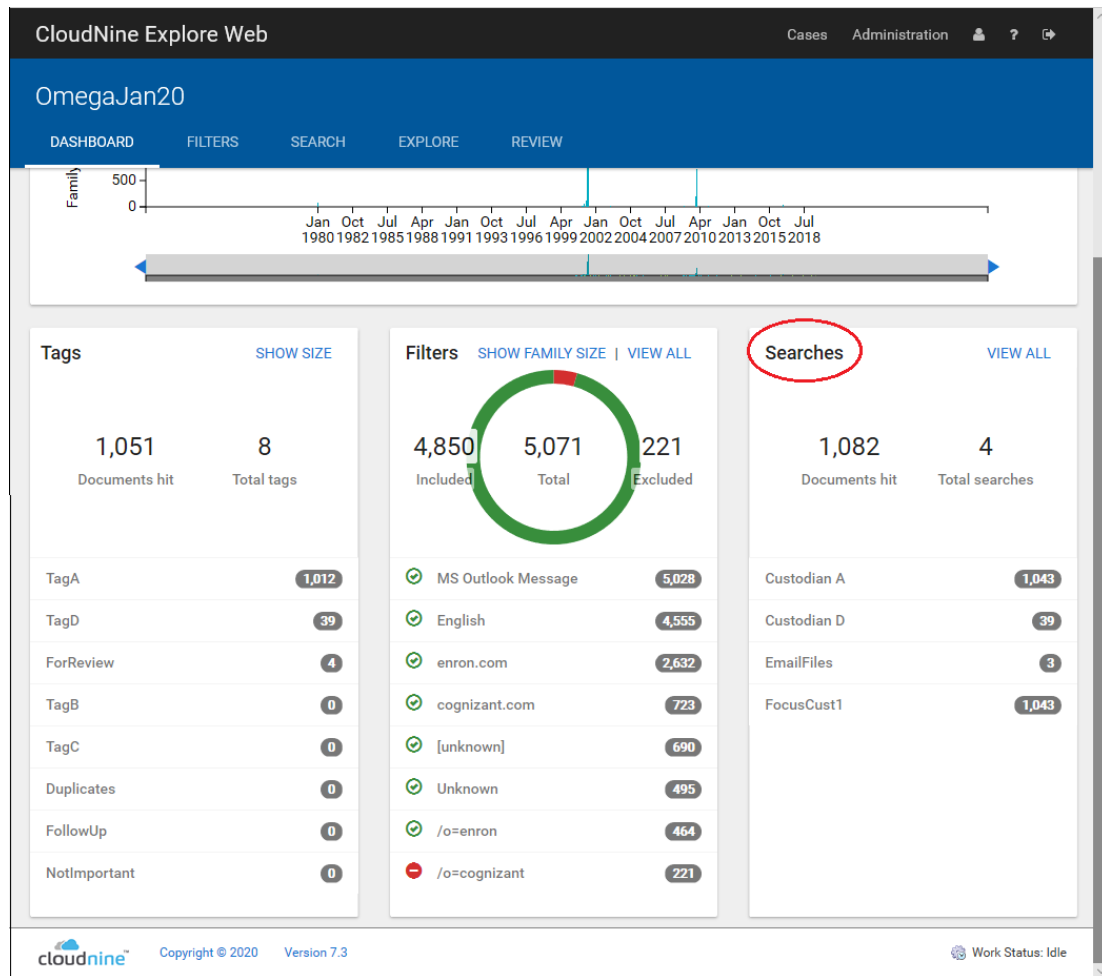
### *Dashboard Searches*

The bottom right of the **DASHBOARD** page displays a **Searches** pane displaying information on the eight most recent searches in the current case.

The top of the **Searches** pane displays the total number of documents returned by searches and the total number of searches in the case.

A list of searches appears at the bottom. Each listed search includes either the number of documents returned for the search or a status message. Status message include:

- **ExecutePending** — The search is on-going.
- **Out of date** — The search needs to be run again for up to date information.
- **Error** — An error has occurred.
- **New** — The search has been created, but has not been run yet.



## Filters

CloudNine™ Explore Web allows you to selectively remove files from the result set. The remaining subset of documents are those from original source content that have the highest likelihood of being relevant to the case. The filtered subset can then be exported to CloudNine™ LAW from CloudNine™ Explore.

Documents are only filtered if they unambiguously meet the criteria you specify. For example, if you apply a date range filter and CloudNine™ Explore Web finds a file that does not contain any date metadata, the file will not be filtered.

CloudNine™ Explore Web provides these types of filters:

- **File Hash Filter** - Filters by NIST (National Institute of Standards and Technology) items and/or from a custom list of file hash items. Removes file types unlikely to contain relevant content, such as system files.
- **Duplicate Document Filter** - Removes duplicate files.
- **Date Range Filter** - Evaluates the sent date for e-mail messages and start- and end-dates for calendar items. E-mails are filtered if the sent date falls outside the range of dates you specify. Calendar items are filtered if both start- and end-dates fall outside the dates you specify. Items with missing or ambiguous date metadata are not filtered. Edocs with date range information available in file headers are also evaluated and extracted for the file type by the CloudNine™ Explore ingestion.
- **File Type Filter** - Removes all but specified file types. A file type list is generated based on analysis of the source files. Select those file types that you want to bypass filtering. File types are identified by CloudNine™ Explore using the same software library used by other CloudNine™ LAW tools. The File Type Filter applies to top level items, known as families. If a file type is only found within a family, it is not filterable by file type and will not be shown in the list of file types.
- **E-mail Sender Domain Filter** - Evaluates the domain that e-mail was sent from. Domains other than those you specify are filtered.
- **Language Filter** - Removes all but files containing the specified languages. A language list is generated based on analysis of the source files. Select those languages that you want to bypass filtering. Documents may have multiple languages. All languages found in a document must be excluded for it to be filtered out.

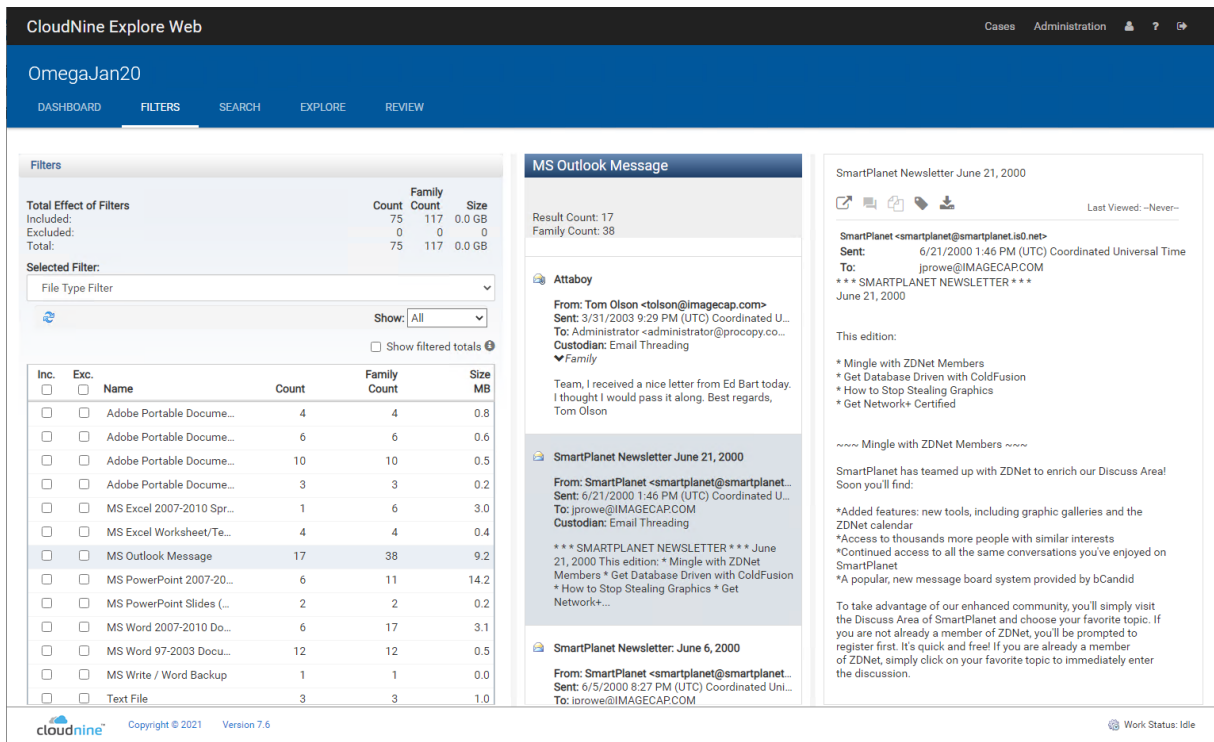


Filter results do not include mail store files, such as .pst and .nsf files, or archive files, such as .zip files.



File system dates are not used for determining document dates.





The **FILTERS** page consists of three panes:

- filters pane - used to define the filter settings for the case.
- document list pane - used to view the filter results for a selected filter.
- document details pane - displays the file information for the file currently selected in the document list pane.

## Filters Pane Details

### Total Effect of Filters

The **Included**, **Excluded**, and **Total** fields are displayed irregardless of what **Selected Filter** is chosen. **Included** indicates the total number of files included in the filter results for the case. **Excluded** indicates the total number of files excluded from the filter results for the case. **Total** shows the total number of files currently in the case.

Values displayed include all loose files, e-mail messages, and Microsoft Office documents. The values exclude all archive, mail store, and forensic image files.

**Count** displays the total number of top-level files, including loose files and parent files such as e-mail messages. **Family Count** displays the total number of top-level files and any attachment or child files, not including containers.

**Size** displays the total size of the documents in gigabytes (GB). **Size** includes the parent and attachments, but does not include size of any containers.

## Selected Filter

The Selected Filter list determines which filter is displayed in the Filters pane. It does not determine which filters are applied to the case. The filter check boxes in the filter list determine which filters are applied to the case documents.

## Show

The **Show** drop down is only available for the File Type, E-mail Sender Domain, and Language Filters. **Show** allows you to narrow down the list of filters displayed in the filter list at the bottom. The Show list contains four selections:

- **All** - All filters are displayed regardless of whether the **Inc.** or **Exc.** is selected for the filter. This is the default.
- **Not Decided** - Only filters with BOTH the **Inc.** and **Exc.** unselected are displayed.
- **Included** - Only filters with the **Inc.** check box selected are displayed.
- **Excluded** - Only filters with the **Exc.** check box selected are displayed.

## Show filtered totals

Select **Show filtered totals** to display totals that are dependent on other filters. By default this box is disabled, in order to show the independent effect of each filter.

For example, let's assume there are 50 .msg files associated with the MS Outlook Message file type filter, and 15 of those same .msg files are associated with a date range filter.


- When the **Show filtered totals** IS NOT selected the count column for MS Outlook Message file type displays 50.
- When the **Show filtered totals** IS selected, the count column for MS Outlook Message file type displays 35 (the total number of MS Outlook Message files in the results after ALL filters are applied).

## Filter List

The filter list displays the filters available for the selected filter type. The check boxes next to each filter in the filter list determine whether the filter is applied to the case documents.

You can sort the columns in the filter list in ascending or descending order. To sort, click the column header name.

Filter List Columns	
Column	Description
Inc.	Include. When selected for a filter, the filter is included in the filter results. To select all filters

Filter List Columns	
	to be included, select the Inc. check box in the column header.
Exc.	Exclude. When selected for a filter, the filter is excluded from the filter results. To select all filters to be excluded, select the Exc. check box in the column header.
 (Date Range Filter only)	When selected, the date range filter is applied to the case documents. When not selected, the date range filter is excluded from the filter results.
Name	Name of the filter.
Start (Date Range Filter only)	Start date for the date range filter.
End (Date Range Filter only)	End date for the date range filter.
Count	The number of case documents in the associated filter results.

Filter List Columns	
Family Count	The number of top-level case documents and attachments in the associated filter results, excluding containers.
Size MB	The sum of the file sizes of the documents associated with the filter. <b>Size</b> includes the parent and attachments, but does not include size of any containers.



When both **Inc.** and **Exc.** are NOT selected for a filter, the filter is automatically included in the filter results, but the filter is designated as "Not Decided".

## Refreshing the FILTERS page


The **FILTERS** page automatically refreshes when you select a different filter or navigate away from the **FILTERS** page. If you change the filter settings or documents are currently being added or removed from the case, you can manually refresh the **FILTERS** page by clicking **Refresh** (double arrows) above the filter list.


## Document List Pane Details

The document list pane in the center of the **FILTERS** page displays the list of documents associated with the filter selected in the left filters pane. **Result Count** and **Family Count** for the selected filter display at the top.

You can scroll through the document list to see additional details for each document. A paperclip icon displays to the left of files that have attachments or embedded files. A down arrow and **Family** is displayed below the document details for documents that are part of a family. Click the **Family** drop down to view a list of attached or embedded files.

The navigation bar at the bottom of the document list pane displays the current page number and the total number of pages of filter results for the selected filter.

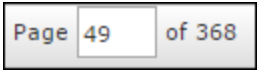
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## Document Details Pane






The document details pane on the right of the **FILTERS** page displays contents and details for the file currently selected in the document list pane. **Last Viewed** displays the date and time the file was last viewed by the current user in Explore Web.


If the text for a document detail is long, such as the To or CC field, only the first line of the field is displayed with an ellipsis at the end. You can click on the field to display the full field value.

If the extracted text exceeds display limit for the document details pane, a message stating **Document text truncated due to length** is displayed along with a **See all** link. Click the link to display all of the file's extracted text in a separate browser window.

The document details toolbar has the following features:

Document Details Pane Toolbar		
Feature	Name	Description

Document Details Pane Toolbar		
	View	Opens the document details pane information in a separate browser window. The separate browser window is synchronized with CloudNine™ Explore Web. If you select another document in the document list pane on the FILTERS page, the separate browser window displays the newly selected document.
	Email thread	Enabled if the currently selected file in the document list pane is associated with an email thread. Opens the Email Thread Viewer. For more information see <a href="#">Viewing Email Threads</a> .
	Near duplicate	Enabled if the currently selected file in the document list pane is associated with near-duplicate files. Opens the Near Duplicate Document Viewer. For more information see <a href="#">Viewing Near Duplicates</a> .
 or 	Tag	Opens the Tagging dialog, where you can add or remove tags from the document. Blue indicates the document has been tagged, gray indicates the document has not been tagged. For more information see <b>Tagging</b> .

Document Details Pane Toolbar		
	D o w n l o a d d o c u m e n t	Downloads a copy of the corresponding native file to the browser downloads location. Redactions and annotations applied in the near native viewer do not show up on the downloaded file. Only files that are 2 GB or less can be downloaded. Only users with standard access, review managers, or administration access may download documents.

### Configuring Filters

## Configuring a File Hash Filter

The File Hash Filter allows you to specify files to be filtered from a case based on the hash value of each file. Any file is filtered that matches either of the following conditions:

- The file is identified in the NIST Items filter.
- The file matches a custom file hash value, as specified by using the Custom File Hash Items filter.



NIST databases cannot be attached to cases and custom file hash value lists cannot be created or imported into CloudNine™ Explore



Web. Each of these file hash filtering configurations are done for a case in CloudNine™ Explore.

Starting from the **FILTERS** page for a case:

1. Choose **File Hash Filter** in the **Selected Filter** drop down. By default, **Inc.** is selected for the **Custom File Hash Items** and **NIST Items** filters.
2. Optionally you can click the **NIST Items** or **Custom File Hash Items** filter to view the associated items in the document list pane.

If a NIST database is not attached to the case the **NIST Items** filter will not function.



If a custom file hash value list has not been created or imported into the case, then the **Custom File Hash Items** filter will not function.

3. Update the **Inc.** and **Exc.** check boxes as needed:
  - To allow NIST items to be included in filter results, select **Inc.** for **NIST Items**.
  - To exclude NIST items from the filter results and export, select **Exc.** for **NIST Items**.
  - To allow file types in the custom file hash value list to be included in filter results, select **Inc.** for **Custom File Hash Items**.
  - To exclude file types in the custom file hash value list from the filter results and export, select **Exc.** for **Custom File Hash Items**.

## Configuring a Duplicate Document Filter



Due to the different technologies used in CloudNine™ LAW and CloudNine™ Explore, the hash values generated for files in LAW will not always match the hash values generated for files in Explore.

Starting from the **FILTERS** page for a case:

1. Choose **Duplicate Document Filter** in the **Selected Filter** drop down. By default, **Inc.** is selected for the Duplicates filter.
2. Optionally you can click the Duplicates filter to display the list of duplicate files in the document list pane.
3. Do one of the following:
  - To allow duplicates to be included in the filter results, select **Inc.** for **Duplicates**.
  - To exclude duplicates from the filter results and export, select **Exc.** for **Duplicates**.

## Configuring Date Range Filters

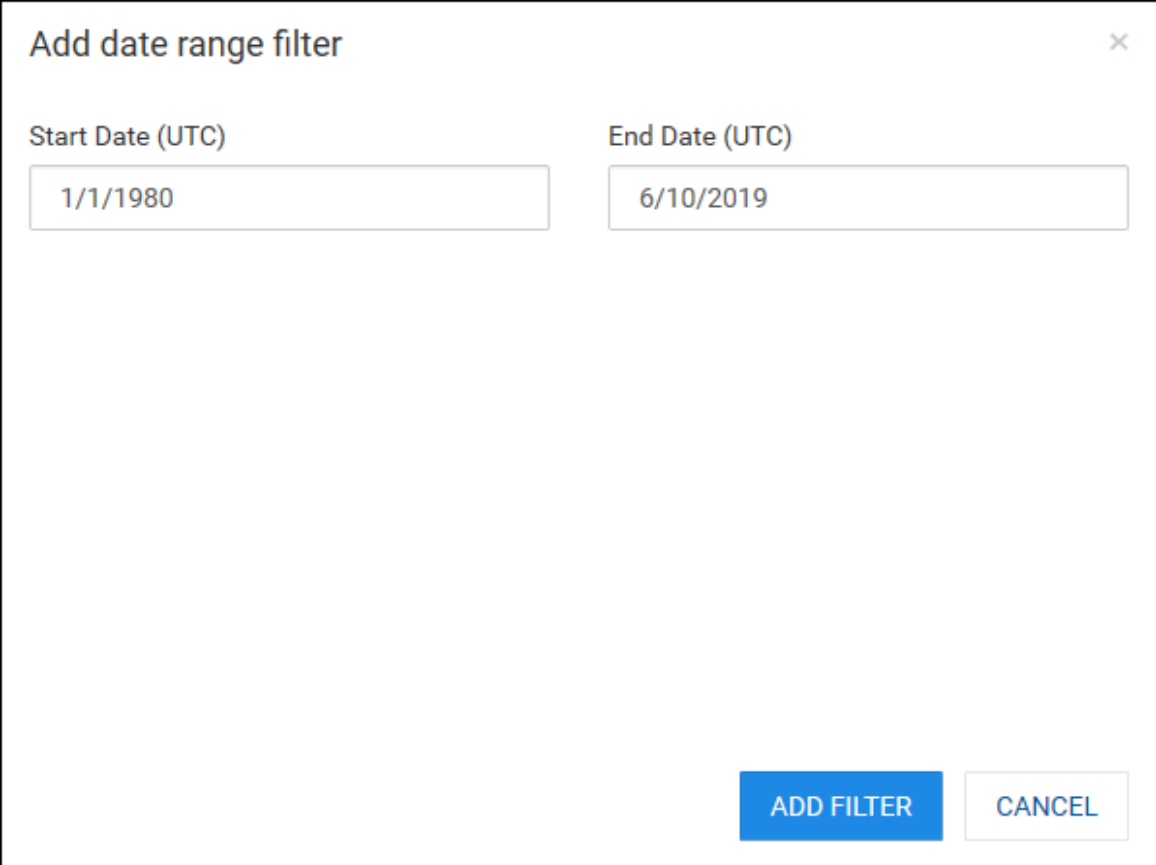
Note the following about how date filtering works:

- The filter removes e-mail with date sent that falls outside the date range(s) you specify. It removes calendar items whose start and end date fall outside the date range(s).
- Dates for e-mail files are determined from the sent date field. If the sent date falls within the date range, then the filter will allow the item to pass.
- Dates for calendar appointments are evaluated based on start and end date fields.
- Dates for files other than e-mail are determined by the document's metadata. The filter will only retain items whose metadata indicates created and modified

dates that fall within the date range(s). If metadata date created or date modified is unavailable, then the filter will allow the item to pass. If both dates are known, and either of the metadata dates falls outside the date range(s) specified, the filter will allow the item to pass.

Starting from the **FILTERS** page for a case:

1. Choose **Date Range Filter** in the **Selected Filter** drop down.
2. Click the plus sign button to display the **Add date range filter** dialog.



The screenshot shows a dialog box titled "Add date range filter" with a close button (X) in the top right corner. The dialog contains two input fields: "Start Date (UTC)" with the value "1/1/1980" and "End Date (UTC)" with the value "6/10/2019". At the bottom right, there are two buttons: "ADD FILTER" (blue) and "CANCEL" (white with blue border).

3. Update the **Start Date** and **End Date** fields to specify what should be used for the new date range filter.
4. Click **ADD FILTER**. A new date range filter is added with the dates you specified and the check box is automatically selected.

5. If you want to filter using multiple date ranges, click the plus sign button again to add another date range filter.
6. Edit an existing date range filter by selecting the calendar icon to the right of the filter in the list. Update the start or end date, then click **UPDATE FILTER** to save your changes.
7. Remove an existing date range filter by selecting the X icon to the right of the filter in the list.
8. To remove all date range filters, select the red X button at the top right of the filter list.
9. Select one of the date range filters from the filter list to display the list files in that date range in the document list pane.
10. Update the **Inc.** and **Exc.** check-boxes in the filter list to include or exclude the associated date range filter documents from the filter results.

## Configuring a File Type Filter

Starting from the **FILTERS** page for a case:

1. Choose **File Type Filter** in the **Selected Filter** drop down.
2. The list in the left pane displays the file types for all files in the case. **Count** displays the number of files of that type. By default, the **Show** drop down is set to **All** (all of the file type filters are displayed in the list), and all **Inc.** and **Exc.** check boxes are unselected.



Show only affects what is displayed in the filter list at the bottom of the left panel. Show has no effect on what file types are included or excluded from the results.



When both **Inc.** and **Exc.** are not selected, the filter is designated as

"Not Decided". Any file type that is "Not Decided" will be included in the filter results and included in the export. A file type is only excluded when the associated **Exc.** check box is selected.

3. Update the **Inc.** and **Exc.** check boxes as needed:
  - Select **Inc.** to include the file type in the filter results.
  - Select **Exc.** to exclude the file type in the filter results and export.

## Configuring an E-mail Sender Domain Filter

Starting from the **FILTERS** page for a case:

1. Choose **E-mail Sender Domain Filter** in the **Selected Filter** drop down.
2. The list in the left pane displays the e-mail sender domains in the case. **Count** displays the number of files for the associated domain. By default, the **Show** drop down is set to **All** (all of the e-mail sender domains are displayed in the list), and all **Inc.** and **Exc.** check boxes are unselected.



Show only affects what is displayed in the filter list at the bottom of the left panel. Show has no effect on what e-mail sender domains are included or excluded from the results.




When both **Inc.** and **Exc.** are not selected, the filter is designated as "Not Decided". Any e-mail sender domain that is "Not Decided" will be included in the filter results and included in the export. An e-mail sender domain is only excluded when the associated **Exc.** check box is selected.

3. Update the **Inc.** and **Exc.** check boxes as needed:
  - Select **Inc.** to include the e-mail sender domain in the filter results.

- Select **Exc.** to exclude the e-mail sender domain in the filter results and export.


## Configuring a Language Filter


Some documents may contain multiple languages. When a document contains multiple languages, the document is included in the count for each language it contains.

-  If a document contains multiple languages and one of the languages in the document is excluded from export, but another language in the document is included in the export, the export may include the document containing the excluded language, depending on the other filter and export settings.

Starting from the **FILTERS** page for a case:

1. Choose **Language Filter** in the **Selected Filter** drop down.
2. The list in the left pane displays the languages identified in the case. **Count** displays the number of files for the associated language. By default, the **Show** drop down is set to **All** (all of the languages are displayed in the list), and all **Inc.** and **Exc.** check boxes are unselected.

-  Show only affects what is displayed in the filter list at the bottom of the left panel. Show has no effect on what languages are included or excluded from the results.

-  When both **Inc.** and **Exc.** are not selected, the filter is designated as "Not Decided". Any language that is "Not Decided" will be included in the filter results and included in the export. A language is only excluded when the associated **Exc.** check box is selected.

3. Update the **Inc.** and **Exc.** check boxes as needed:

- Select **Inc.** to include the language in the filter results.
- Select **Exc.** to exclude the language in the filter results and export.

## Search

The **SEARCH** page allows you to search the filtered case records that have been imported into the case in CloudNine™ Explore. Searches are performed on the filtered records for a case. For example, if a case contains 3,000 records, but after filtering the records there are only 500 records, a search query is run against the 500 remaining case records.

Searching is made possible because CloudNine™ Explore automatically creates a comprehensive index during the import process. You can search and locate all instances or "hits" of your search terms in the filtered case records. Search terms can be more than one word. They can also be numbers, text phrases, or a combination of terms and search operators. All records or individual records returned from a search query can be tagged in CloudNine™ Explore Web. See **Indexing** in the CloudNine™ Explore documentation for more information.

Search queries can also be imported into CloudNine™ Explore Web from a line-delimited text file. When search queries are imported into CloudNine™ Explore Web, they are automatically added to the list on the **SEARCH** page in the **Search Request** pane. You can also export search queries to a line-delimited text file in order to import them into another case.

On the **SEARCH** page, tags can be applied to all or individual records in a search query. For more information about tagging documents by search query see **Tagging**.

A case's saved search queries are synchronized for the case between CloudNine™ Explore and CloudNine™ Explore Web. When saved search queries are added, edited, or deleted from CloudNine™ Explore or CloudNine™ Explore Web, the search query information is automatically updated for the case in the other application.

CloudNine™ Explore and CloudNine™ Explore Web use the dtSearch® search engine for searching in CloudNine™ Explore and CloudNine™ Explore Web. For more information about dtSearch see <http://www.dtsearch.com/index.html>.

There are two levels of searching in CloudNine™ Explore Web:

- **Basic Searching** — performing keyword (one word) searches and locating all instances of the term in the filtered case records.
- **Advanced Full-Text Searching** — performing searches with two or more search terms to enable more precise search results.

The screenshot displays the CloudNine Explore Web interface for a case named 'OmegaJan20'. The 'SEARCH' tab is active. The 'Search Request' pane shows a table with 4 completed searches:

ID	Search	Filter	Tags	Count	Size
1	FocusCust1	▼		854	113.3
2	EmailFiles	▼		2	0.1
3	Custodian D	▼		7	2.9
4	Custodian A	▼		854	113.3

The 'Document List' pane shows a search for 'FocusCust1' with a result count of 854 and a family count of 854. A document titled 'coffee\_aba\_national\_institute...' is selected.

The 'Document Details' pane shows the content of the selected document, which is a PowerPoint presentation titled 'coffee\_aba\_national\_institute\_on\_class\_actions.pptx'. The content includes the name of John C. Coffee, Jr., his title as a professor of law at Columbia University Law School, and the title of the presentation: 'THE NEW CLASS ACTION LANDSCAPE: Trends and Developments in Class Certification ABA National Institute on Class Actions, October 25, 2012'.

The **SEARCH** page consists of three panes:

- **Search Request** pane - used to define search queries for the case.
- **Document List** pane - used to view the results for a selected search.
- **Document Details** pane - displays the file information for the file currently selected in the document list pane.



Access to features and functionality in CloudNine™ Explore Web is dependent on your role in the system.



- Read-only users have read-only access to the **SEARCH** page.
- Standard access users have access to the **SEARCH** page and have permission to create, edit, delete, import, and export tags. They can also download and tag documents in the core platform.
- Administrators have access to the **SEARCH** page and have permission to create, edit, delete, import, and export tags. They can also tag and download documents in the core platform and on the **REVIEW** page.

## Search Request Pane Details

### Search Options

At the top right of the Search Request Pane is the Search Options (gear) icon. Clicking this icon opens the Search Options dialog.

**Search Options**

Use Stemming

Use Phonic Searching

Use Fuzzy Searching

1

Search Syntax

Boolean

All Words

Any Words

Synonym Searching

WordNet Synonyms

WordNet Related Words

SAVE CANCEL

### ***Use Stemming***

Stemming extends a search to cover grammatical variations on a word. For example, a search for applied would also find applying, applies, and apply.

### ***Use Phonic Searching***

Phonic searching looks for a word that sounds like the search word you are searching for and begins with the same letter. For example, a phonic search for Smith will also find Smithe and Smythe.

## ***Use Fuzzy Searching***

Fuzzy searching looks for words with similar spelling as the search term. For example, the search term case might return records that contain cash, cage, cake, etc. Fuzzy searching can be particularly useful in finding misspellings of a search term. Set the fuzzy searching value to a number between 1 and 10, with 1 being the least fuzzy and 10 being the most fuzzy.

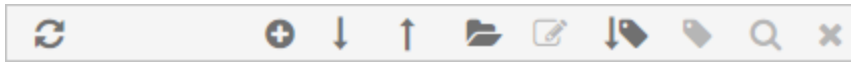
## ***Search Syntax***

- **Boolean** - This is the default value. Boolean searches find a structured group of words or phrases linked by and, or, not, and w/.
- **All Words** - Finds the search term in any sequence of text, such as a sentence or a question. Documents must include all words in the search to be returned by the search.
- **Any Words** - Finds the search term in any sequence of text, such as a sentence or a question. Documents that include at least one word in the search are returned.

## ***Synonym Searching***

- **WordNet Synonyms** - Use synonyms from the WordNet thesaurus for synonym searching.
- **WordNet Related Words** - Use related words from the WordNet thesaurus for synonym searching.

## **Search Request Pane Toolbar**



Search Request Pane Toolbar			Read-only	Standard Access	Review Manager
Icon	Feature	Description			
Circular Arrow	Refresh saved search list	Refreshes the search results on the <b>SEARCH</b> page.	√	√	√
Plus	New	Opens the <b>Create new search</b> dialog for adding a new search query to the case.		√	√

Search Request Pane Toolbar			Read-only	Standard Access	Review Manager
Sign	search				
Down Arrow	Import searches	Opens the <b>Import Searches</b> dialog for importing search queries from a line-delimited .txt file.		√	√
Up Arrow	Export searches	Exports the case's saved searches to a line-delimited .txt file.		√	√
Folder	Search	Opens the <b>Search Sets</b> dialog for adding, editing, and deleting search sets.		√	√

Search Request Pane Toolbar			Read-only	Standard Access	Review Manager
	sets	For details on search sets, see <b>Organizing Searches</b> .			
Box with Pencil	Edit checked searches	If the check box for two or more search queries are selected in the <b>Search Request</b> pane, opens the <b>Edit Searches</b> dialog for editing the selected queries. If only one check box is selected, opens the <b>Edit Search</b> dialog for editing the individual search query.		√	√
Down arrow with	Tag imported IDs	Opens the <b>Tag Imported IDs</b> dialog for importing a line-delimited text file containing Edald field values and applying a tag to the documents associated with the Edald field values in the text file.		√	√

Search Request Pane Toolbar			Read-only	Standard Access	Review Manager
Tag					
Tag	Tag checked searches	Opens the <b>Group Tagging</b> dialog.		√	√
Magnifying Glass	Run checked searches	Runs the saved search queries that currently have their check box selected on the <b>Search Request</b> pane.		√	√

Search Request Pane Toolbar			Read-only	Standard Access	Review Manager
X	Delete checked searches	Opens the <b>Delete Searches</b> dialog for deleting the saved search queries that currently have their check box selected on the <b>Search Request</b> pane.		√	√

## Refresh

By default, the **SEARCH** page automatically refreshes itself every five seconds, and when you navigate away from the **SEARCH** page. If a case has thousands of searches and the refresh update takes longer than five seconds, CloudNine™ Explore Web automatically adjusts the **SEARCH** page refresh rate for the case to accommodate the longer refresh update time. If documents are currently being added or removed from the case while you are viewing the **SEARCH** page, you can manually refresh the **SEARCH** page by clicking the refresh icon (circular arrows).



## Search Request Status

At the top left of the search list is a status of completed search queries. This status displays the current number of searches that have successfully run out of the total number of saved search queries in the case. The completed total excludes any search query that is currently running, is new and never run, is out-of-date, or did not run successfully.

## Search Analysis

Above the right hand corner of the search request list is the Search Analysis (bar graph) icon. Clicking this icon displays the **Search Analysis** pane in place of the **Search Request** pane. See [Search Analysis](#) for more details.

## Search List

The Search Request list displays the saved search queries created for the case. Each search has a corresponding check box that can be selected in order to include the search when accessing features from the **Search Request** pane toolbar or during search analysis.


You can sort the search list by a specific column in ascending or descending order by clicking the column header name.




Search Request List Columns	
Column	Description

<h2>Search Request List Columns</h2>	
<input checked="" type="checkbox"/>	<p>The check box column next to the Name column is used to select a search query for running, editing, deleting, or analyzing the search query. Before any of these processes can be performed on a search query, the check box for the search query needs to be selected.</p> <p>To select all check boxes, select the check box in the header. To clear all check boxes, clear the check box in the header.</p>
ID	<p>The number automatically assigned to a search query when it is created. ID numbers are incrementally assigned from smallest to largest. The ID is permanently assigned to the search query. If the search query is deleted, the query's ID is permanently removed from the case and not used for another query.</p>
Status Icon	<p>The current status for each saved search query. See the table below for more information.</p>
Search	<p>The provided search name in italic or the search query text if no name is provided. For search sets, the field contains the search set name. You can view the search query associated with a search by hovering over the search name.</p>
Filter	<p>If one or more search filters are applied to a search query, the filter icon (funnel) is displayed. The Filter column is blank if no search filters are applied to the query.</p>

Search Request List Columns	
Tags	If group tags are applied to the search query, the tag icon is displayed. If no group tags are assigned to the search query, the Tags column is blank.
Count	The number of case documents returned for the search results.
Size	The sum of the file sizes of the documents in megabytes. The Size value is calculated using family size. A hit directly on an attachment or the parent document brings in the family. Family size includes parents and attachments, but does not include containers.

## Search Status Icon Key

Search Status Icon Key		
Icon	Name	Description
	New	Search query is new and has not run yet.

Search Status Icon Key		
	P e n d i n g	Search query is currently running.
No icon	C o m p l e t e	When no icon is displayed for a search in the Status column, the search query is completed and the search results are current.
	O u t o f D a t e	Search query results are out of date. This is displayed if documents have been added or removed from the case or if filter settings that affect the saved search query have been modified.
	E r r o r	Explore encountered an error while running the search query.

## **Document List Pane Details**

The document list pane in the center of the **SEARCH** page is used to view the search results for the search query highlighted in the **Search Request** pane on the left. **Result Count** and **Family Count** for the selected search query display at the top.

You can scroll through the document list to see additional details for each document. A paperclip icon displays to the left of files that have attachments or embedded files. A down arrow and **Family** is displayed below the document details for documents that are part of a family. Click the **Family** drop down to view a list of attached or embedded files.

The document list pane has a toolbar at the top providing access to several features:

Document list pane toolbar			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
Icon	Feature	Description			
Box with Pencil	Edit search	<p>Opens the <b>Edit Search</b> dialog box for editing the search query currently selected in the <b>Search Request</b> pane.</p> <p>If a search set is currently selected in the</p>		√	√

Document list pane toolbar			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
		<p><b>Search Request</b> pane, the <b>Edit Searches</b> dialog box opens for editing all of the search queries in the selected search set.</p>			
Tag	Tag documents	<p>Opens the <b>Bulk Tagging</b> dialog allowing you to select or remove a tag from all the documents</p>		√	√


Document list pane toolbar			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
		associated with the selected search query.			
Magnifying Glass	Run search	Runs the search query that is highlighted in the <b>Search Request</b> pane.		√	√
X	Delete search	Opens the <b>Delete Search</b> dialog to for the search query highlighted in		√	√




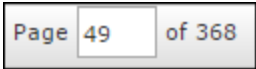
<b>Document list pane toolbar</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>
		the <b>Search Request</b> pane.			

The navigation bar at the bottom of the document list pane displays the current page number and the total number of pages of filter results for the selected filter.

<b>Navigation Bar Key</b>	
<b>Feature</b>	<b>D e s c r</b>

Navigation Bar Key	
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Navigation Bar Key	
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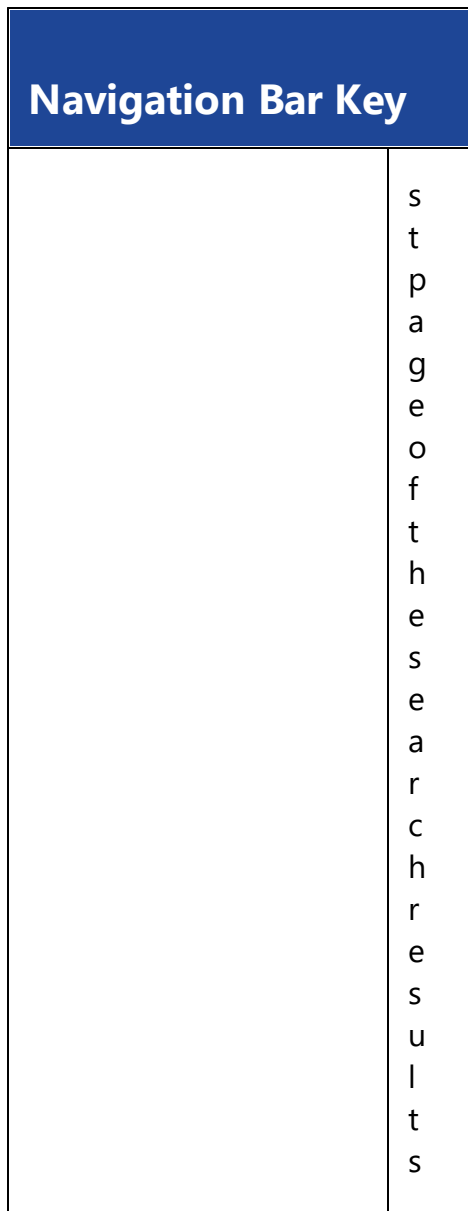
## Navigation Bar Key

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Navigation Bar Key	
	t h e s e a r c h r e s u l t s .
	N a v i g a t e s t o t h e l a





## **Document Details Pane**


The document details pane on the right of the **SEARCH** page displays contents and details for the file currently selected in the document list pane. **Last Viewed** displays the date and time the file was last viewed by the current user in Explore Web.


If the text for a document detail is long, such as the To or CC field, only the first line of the field is displayed with an ellipsis at the end. You can click on the field to display the full field value.


If the extracted text exceeds display limit for the document details pane, a message stating **Document text truncated due to length** is displayed along with a **See all** link. Click the link to display all of the file's extracted text in a separate browser window.



The document details toolbar has the following features:


<b>Document Details Pane Toolbar features</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>



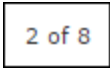
Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
	Vi e w e r	Opens the document details pane information in a separate browser window. The separate browser window is synchronized with CloudNine™ Web. If you select another document in the document list pane on the <b>SEARCH</b> page, the separate	√	√	√

Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
		browser window displays the newly selected document.			
	E m a i l t h r e a d	Enabled if the currently selected file in the document list pane is associated with an email thread. Opens the <b>Email Thread Viewer</b> . For more	√	√	√

Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
		information see <a href="#">Viewing Email Threads</a> .			
	N e a r- d u p l i c a t e	Enabled if the currently selected file in the document list pane is associated with near-duplicate files. Opens the <b>Near Duplicate Document Viewer</b> . For	√	√	√

<b>Document Details Pane Toolbar features</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>
		more information see <a href="#">Viewing Near Duplicates</a> .			
 or 	Tag	Opens the <b>Tagging</b> dialog, where you can add or remove tags from the document. Blue indicates the document has been tagged, gray indicates		√	√

Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
		the document has not been tagged.			
	Download document	Downloads a copy of the corresponding native file to the browser downloads location. Only files that are 2 GB or less can be downloaded.		√	√

Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
	e nt				
	Pr e v i o u s	Navigate to the previous search hit in the document.	√	√	√
	N e x t	Navigate to the next search hit in the document.	√	√	√
	C u r r e	Displays the currently displayed search	√	√	√



<b>Document Details Pane Toolbar features</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>
	nt a n d t o t a l s e a r c h h i t s	hit in the current file, and total number of search hits found in the file's extracted text (including hits outside the displayed truncated text).			

### ***Creating and Running a Search***

In CloudNine™ Explore Web, you can run new and saved searches against a case's filtered records from the **Search Request** pane on the **SEARCH** page. New searches are run by entering a search query in the **New Search** dialog and clicking **SAVE AND SEARCH**. Saved searches are run from the **SEARCH** page by selecting a saved search or searches and then clicking the **Run checked searches** (magnifying glass) button. You can run multiple searches simultaneously in CloudNine™ Explore Web. =

You can create and run basic and full-text searches in CloudNine™ Explore Web. When you are creating full-text searches you can manually add search terms or you can add search terms directly from the dictionary, fields, and field values. You can also help fine-tune your searches by applying search filters, including date ranges, in the **New Search** or **Edit Search** dialog.

Before defining searches, be sure to select the search options you want to use in the **Search Options** dialog. For more information see [Search Options](#).



If the **Any Words** or **All Words** option is selected in the **Search Options**, the sequence of search term words in the query must be wrapped in quotes to prevent the search from inserting Boolean operators (like AND or OR) between the words in the sequence.

## **Creating and Running a Basic Word Search**



Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane, click the **New search** (plus sign) button. The **Create new search** dialog displays.

## Create new search ×

Search Name  Set

SEARCH FILTERS SEARCH FIELDS DICTIONARY

Date Range   To  

Custodians **0 of 4 selected**

Import Sessions **0 of 3 selected**

Tags **0 of 9 selected**

Folders or Files **none selected**

Other Searches **none selected**

2. Enter the word(s) to search for in the **Type search terms here** box.
3. Enter an optional **Search Name**, up to 100 characters. The provided **Search Name** will be displayed as the search name in italics in the **Search Request** pane. If a **Search Name** is not provided, the search query text will be displayed as the name in the **Search Request** pane.
4. If you want to add the search to a search set, select the applicable search set from the **Set** drop down.
5. Click **SAVE AND SEARCH**. The search runs and is added to the list in the **Search Request** pane.

6. After the search is complete, you can select the search in the **Search Request** pane to view results in the document list pane and see your search hits in the document details pane.

## Creating and Running a Full-Text Search

Full-text searching includes additional advanced search features that allow you to write longer full-text queries. When writing advanced full-text search queries, you will want to learn how to use search operators that help provide precise search results. For more information see **Search Operators**.

Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane, click the **New search** (plus sign) button. The **Create new search** dialog displays.
2. Enter an optional **Search Name**, up to 100 characters. The provided **Search Name** will be displayed as the search name in italics in the **Search Request** pane. If a **Search Name** is not provided, the search query text will be displayed as the name in the **Search Request** pane.
3. If you want to add the search to a search set, select the applicable search set from the **Set** drop down.
4. Enter the search query, including operators if needed, to the **Type search terms here** box.
5. Define any [SEARCH FILTERS](#), [SEARCH FIELDS](#), and [DICTIONARY](#) details you want for the search. For more information on these additional filter options, see details below.
6. Click **SAVE AND SEARCH**. The search runs and is added to the list in the **Search Request** pane. If you added **SEARCH FILTERS** to the search, the **Search Request** pane will display a Filter (funnel) icon with the search. You can hover your mouse pointer over the Filter icon to view the **SEARCH FILTERS** that were configured.

7. After the search is complete, you can select the search in the **Search Request** pane to view results in the document list pane and see your search hits in the document details pane.

## Create new search - SEARCH FILTERS

There are six customizable additional filters that you can add to a search query to fine-tune your search results.

### *Date Range Filter*

The **Date Range** filter searches a specific date range within the filtered case records. On the **Create new search** dialog, type **Start** and/or **End** UTC dates into the edit boxes. Alternatively you can click the calendar icons in the **Start** and **End** fields to select dates from a calendar pop up.

### *Custodians Filter*

The **Custodians** filter searches specific custodians within the filtered case records. Click on the link next to the **Custodians** filter on the **Create new search** dialog. The **Search Filter - Custodians** dialog displays.

1. Select the **Inc** check box next to the custodians you want to include in the search results, or the **Exc** check box for those custodians you specifically want to exclude from the search results.
2. Click **OK** to save your selections. The **Custodians** link on the **Create new search** dialog updates to show the number of custodians selected.

Inc	Exc	
<input type="checkbox"/>	<input type="checkbox"/>	Custodian
<input type="checkbox"/>	<input type="checkbox"/>	Custodian A
<input type="checkbox"/>	<input type="checkbox"/>	Custodian B
<input type="checkbox"/>	<input type="checkbox"/>	Custodian D
<input type="checkbox"/>	<input type="checkbox"/>	Custodian E

### ***Import Sessions Filter***

The Import Sessions filter searches specific import sessions within the filtered case records. Click on the link next to the **Import Sessions** filter on the **Create new search** dialog. The **Search Filter - Import Sessions** dialog displays.

1. Select the **Inc** check box next to the import sessions you want to include in the search results, or the **Exc** check box for those import sessions you specifically want to exclude from the search results.
2. Click **OK** to save your selections. The **Tags** link on the **Create new search** dialog updates to show the number of tags selected.

### Search Filter - Import Sessions ×

Inc	Exc	
<input type="checkbox"/>	<input type="checkbox"/>	<b>Import Session</b>
<input type="checkbox"/>	<input type="checkbox"/>	2020-01-03-001
<input type="checkbox"/>	<input type="checkbox"/>	2020-01-08-001
<input type="checkbox"/>	<input type="checkbox"/>	2020-01-10-001

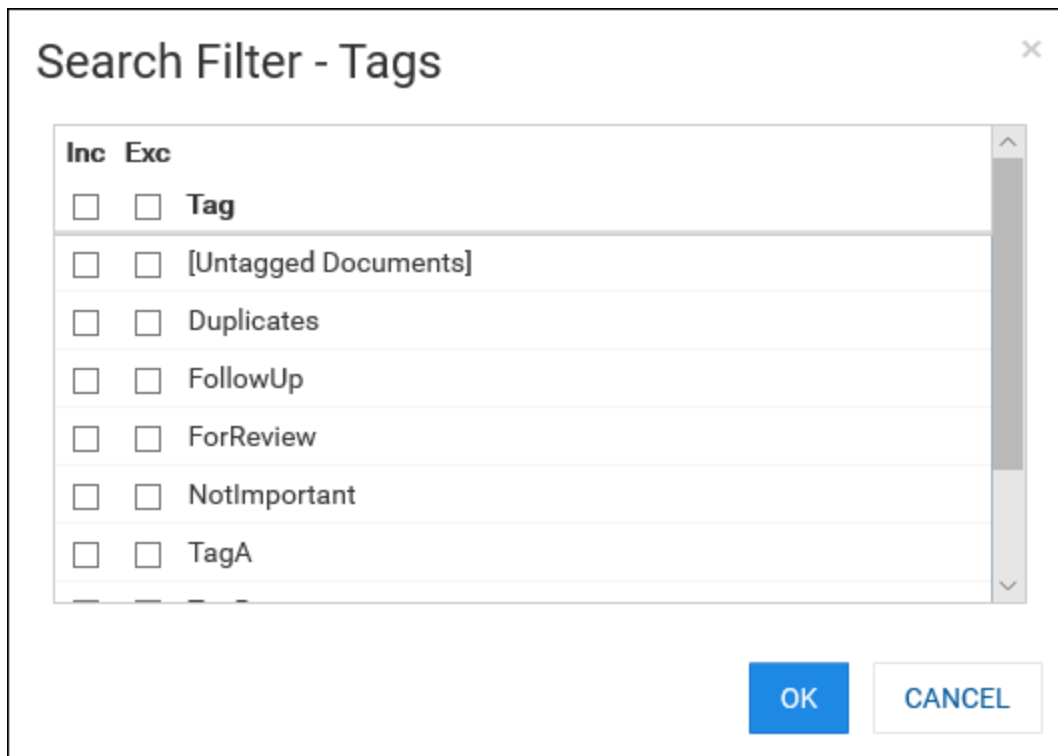
## **Tags Filter**

The Tags filter searches specific selected tags and/or the untagged documents within the filtered case records. Click on the link next to the **Tags** filter on the **Create new search** dialog. The **Search Filter - Tags** dialog displays.

1. If you want to include documents in the filtered case records that do not have ANY tags currently applied to them in the search results, select **Inc** for **[Untagged Documents]**.
2. Select **Inc** for tags to include in the search results, or the **Exc** for tags you want to exclude from the search results.
3. Click **OK** to save your selections. The **Tags** link on the **Create new search** dialog updates to show the number of tags selected for the search.



To quickly identify the which filtered documents in the case do not have any tags applied to them, you can create and run a search query with just the **[Untagged Documents]** tag selected.



### ***Folders or Files Filter***

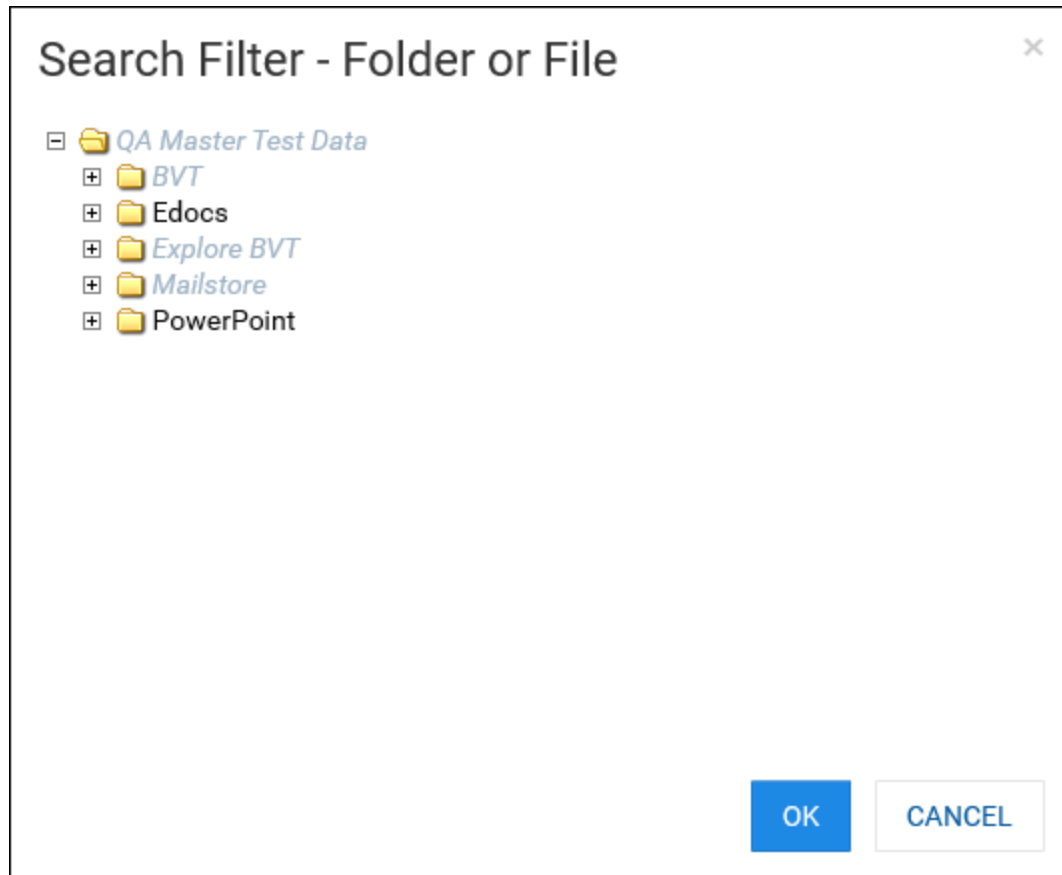
The Folders or Files filter searches the selected folder or file within the filtered case records. Click on the link next to the **Folders or Files** filter on the **Create new search** dialog. The **Search Filter - Folder or File** dialog displays.

1. All of the case's folders, mail store, and archive files are listed in a tree structure. If an entire folder of files was added to the case, the folder name will show in black and you won't be shown the individual files in that folder. If only some files in a folder are in the case, the parent folder for the file appears in gray and the individual files in black. Use the expand/collapse icons to review the list of folders and files. Use your mouse to select a folder or



individual file to include in the search results. You can only select a single file or a single folder shown in black text.

2. Click **OK** to save your selections. The **Folders or Files** link on the **Create new search** dialog updates to show the file or folder you selected.

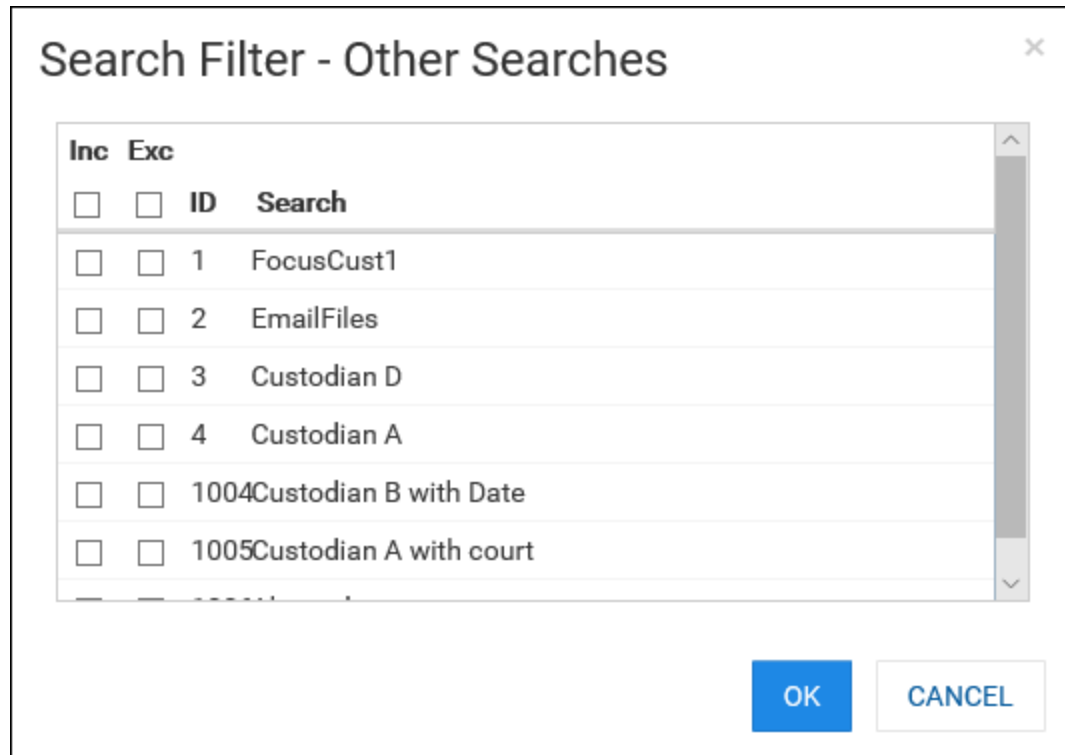


### **Other Searches Filter**

The Other Searches filter searches the case's other selected search queries within the filtered case records. Click the link next to the **Other Searches** filter on the **Create new search** dialog. The **Search Filter - Other Searches** dialog displays.

1. Select the **Inc** check box next to the other searches you want to include in the search results, or the **Exc** check box for those other searches you specifically want to exclude from the search results.

2. Click **OK** to save your selections. The **Other Searches** link on the **Create new search** dialog updates to show the number of other searches selected.



## Create new search - SEARCH FIELDS

1. When creating or editing a search, click **SEARCH FIELDS** to configure searching within specific fields.
2. The **Available Fields** list contains all of the metadata fields available for use in your search. Select a field in the **Available Fields** list to see the possible values for that field in the **Available Values** list.
3. If this is the first term being added to the search query, the **Operators** selection is ignored. If a term already exists, select **AND** or **OR** in the **Operators** list to determine how the query terms will be joined together for the overall search query. For more information see **Search Operators**.

4. You can add just a field to a query in order to search for term(s) within that field. Alternatively you can add both a field and value together to a query in order to find results with a matching value in the associated field.
  - a. To search for term(s) within a field, select the field from the **Available Fields** list. Click **APPEND**. Additional query terms are added to the box at the top. You can edit the query to insert the specific term(s) you want to find.
  - b. To search for results with an available field value, select the field from the **Available Fields** list and then select the value you want in the **Available Values** list. Click **APPEND**. Additional query terms are added to the box at the top.



If you are adding a field value that contains special characters that dtSearch treats as spaces, CloudNine™ Explore will strip these special characters out of the field value and replace them with spaces when you click **APPEND**. When a field value with special characters is selected, an exclamation icon is displayed next to the **APPEND** button.

## Create new search ×

Search Name  Set

SEARCH FILTERS SEARCH FIELDS DICTIONARY

Operators	Available Fields	Available Values
AND	CC	
OR	ContainerPath	
	Custodian	
	DateLowerBound	
	DateUpperBound	

APPEND

CANCEL SAVE AND SEARCH

## Create new search - DICTIONARY

CloudNine™ Explore creates a dictionary word list when indexing the records imported into a case. You can see these indexed words, and include them in your search queries.

1. When creating or editing a search, click **DICTIONARY** add indexed words to your search terms.

2. Type part or all of a word in the **Dictionary Lookup** edit box. The **Word** list box is updated to display words starting with the characters you entered. For each **Word**, a **Doc Count** and **Hit Count** is also displayed.
3. If this is the first term being added to the search query, the **Operators** selection is ignored. If a term already exists, select **AND** or **OR** in the **Operators** list to determine how the query terms will be joined together for the overall search query. For more information see **Search Operators**.
4. Click the **Word** you want to add to the search query and click **APPEND**. The word you selected is added to the query terms in the box at the top.

### Create new search ✕

Search Name  Set


SEARCH FILTERS   SEARCH FIELDS   DICTIONARY

**Operators**

- AND
- OR

**Dictionary Lookup**

**Running Saved Searches**

 When saved searches queries are running, users can continue working in CloudNine™ Explore Web, but sources cannot be deleted from a case and OCR cannot be performed on documents in CloudNine™ Explore while the searches are processing.

## Running Saved Search Queries

In CloudNine™ Explore Web, you can select one or more saved searches and run them with one click. When you run multiple search queries, each search query is run individually against the filtered case files. Once each query finishes running, you can click the saved query to view the search results in the document list pane.

Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane, select the check box next to the saved search queries you want to run. If you want to select all searches, select the check box in the header row.
2. Click the **Run checked searches** (magnifying glass) icon in the toolbar.
3. If the search has never been run, or if the case data has been modified since the search was previously run, the search will execute. Once the search is complete, the **Count** and **Size** fields will be updated in the **Search Request** pane.

### *Editing and Deleting Searches*

## Editing Searches

In CloudNine™ Explore Web, you can select and edit one single saved search, or if you want to make the same changes to multiple search queries, you can edit multiple searches simultaneously. When editing multiple searches, only modified filters will be changed for each individual query (the individual searches will retain their original filters that were not modified during the multiple edit).



You cannot edit the search name or query text directly when editing multiple searches simultaneously.

Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane, select one or more saved search queries.
2. Click the **Edit checked searches** (box with pencil) icon in the toolbar.
3. If one search was selected, the **Edit Search** dialog displays. If more than one search was selected, the **Edit Searches** dialog displays.
4. Make your search modifications. For further details on the various search filters and options, see [Creating and Running a Search](#).
5. When your changes are complete, click **SAVE AND SEARCH**. The searches are saved and run.

## Deleting Searches

On the SEARCH page, you can delete one or more searches from the Search Request pane, or the currently displayed search from the document list pane.

Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane:
  - a. Select the check boxes for one or more saved search queries.
  - b. Click the **Delete checked searches** (X) icon in the toolbar.
  - c. The Delete Searches dialog displays. Click **DELETE SEARCHES** to confirm deletion.
  - d. The searches are deleted and the search list is updated.
2. After selecting (highlighting) a single search in the **Search Request** pane, in the document list pane:
  - a. Click the **Delete search** (X) icon in the toolbar.
  - b. The **Delete Search** dialog displays. Click **DELETE SEARCH** to confirm deletion.
  - c. The search is deleted and the search list is updated.



### **Organizing Searches**

In CloudNine™ Explore Web, you can use search sets to help organize your search queries. Search sets are containers for grouping search queries. They allow you to group related searches in one place so you can compare search results.

Let's say you want to find all results containing the keyword "defective". You want to make sure that those results are associated with two specific custodians - "Custodian B" and "Custodian D". You could create three separate search requests: one with keyword "defective", a second with keyword "defective" and "Custodian B", and a third with keyword "defective" and "Custodian D". If you group all three search requests with the same search set, you can easily see the result counts for each to verify there are no additional custodians with results for the keyword "defective".

Like search queries, search sets are synchronized for a case between CloudNine™ Explore and CloudNine™ Explore Web. When search sets are added, edited, or deleted from CloudNine™ Explore or CloudNine™ Explore Web, the search set information is automatically updated for the case in the other application.

Search sets are displayed at the bottom of the search list on the **Search Request** pane. To distinguish search sets from search queries, search set names are displayed in bold text in a gray bar with a folder icon at the left. Searches associated with the search set are displayed below the search set name. You can expand or collapse the individual search set list by clicking on the search set folder icon.

<input type="checkbox"/>	ID	Search	Filter	Tags	Count	Size
<input type="checkbox"/>	1	FocusCust1	▼		854	113.3
<input type="checkbox"/>	2	EmailFiles	▼		2	0.1
<input type="checkbox"/>	3	Custodian D	▼	🏷️	7	2.9
<input type="checkbox"/>	4	Custodian A	▼		854	113.3
<input type="checkbox"/>	1005	Custodian A ...			29	7.8
<input type="checkbox"/>	1006	Alexandra			4	3.6
	<b>Defective</b>					
<input checked="" type="checkbox"/>	2009	defective			5	2.2
<input checked="" type="checkbox"/>	2010	defective B	▼		3	0.0
<input checked="" type="checkbox"/>	2011	defective D	▼		2	2.1

If you select a search set name in the **Search Request** pane list, the document list pane is updated to show results for the search set. If a document belongs to more than one search within the search set, it is only counted once in the **Result Count** displayed for the search set in the document list pane.

If you remove all searches from a search set, the search set will no longer display in the **Search Request** pane list.

## Creating a Search Set

Starting from the **SEARCH** page for a case:

1. On the **Search Request** pane, click the **Search sets** (folder) icon on the toolbar. The **Search Sets** dialog displays.

The screenshot shows a dialog box titled "Search Sets". At the top left is the title "Search Sets" and at the top right is a help icon (question mark in a circle) and a close icon (X). Below the title bar is a text input field. To the right of the input field is an "ADD" button. Below the input field is a list titled "Set Name". The list is currently empty and contains the text "No Search Sets defined". At the bottom right of the dialog is a "CLOSE" button.

2. In the box above the **Set Name** list, type the name of the search set you want to create. Search set names can be up to 250 characters long.
3. Click **ADD**. The search set name is added to the **Set Name** list.
4. Click **CLOSE**.

## **Adding a Search to a Search Set**

You can assign a search set to a search query when initially creating a search query by selecting the search set name in the **Set** drop-down on the **Create new search**

dialog. Alternatively you can assign search sets to existing saved searches by editing them. You should create the search sets prior to adding them to a search.

Starting from the **SEARCH** page for a case:

1. On the **Search Request** pane, select the check box for the search query or queries you want to add to a search set.
2. Click the **Edit checked searches** (box with pencil) icon in the toolbar.
3. If one search was selected, the **Edit Search** dialog displays. If more than one search was selected, the **Edit Searches** dialog displays.
4. In the **Set** drop-down, select the search set name you want to associate with the selected search queries.
5. When your changes are complete, click **SAVE AND SEARCH**. The searches are saved and run. The **Search Request** pane updates and the search set name displays with a list of associated searches beneath the name.

If a search set name is already displayed in the **Search Request** pane, you can add additional searches to the search set by selecting the search query in the list and dragging it underneath the search set name in the list.

## Removing a Search from a Search Set

Starting from the **SEARCH** page for a case:

1. On the **Search Request** pane, select the check box for the search query or queries from which you want to remove a search set.
2. Click the **Edit checked searches** (box with pencil) icon in the toolbar.
3. If one search was selected, the **Edit Search** dialog displays. If more than one search was selected, the **Edit Searches** dialog displays.
4. In the **Set** drop-down, select **<none>** for the search set name.

5. When your changes are complete, click **SAVE AND SEARCH**. The **Search Request** pane will update and show the searches are no longer associated with a search set.

You can also select and drag a search in the **Search Request** pane out of a search set list, and into the top section of the list with searches that are not part of a search set.

## Editing a Search Set Name

Starting from the **SEARCH** page for a case:

1. On the **Search Request** pane, click the **Search sets** (folder) icon on the toolbar. The **Search Sets** dialog displays.
2. Select the search set you want to edit. The search set name will be populated in the edit box at the top.
3. Modify the search set name as needed. Click **SAVE**. The search set name is updated in the **Set Name** list.
4. Click **CLOSE**. The updated search set name is reflected in the **Search Request** pane.

## Deleting a Search Set

Starting from the **SEARCH** page for a case:

1. On the **Search Request** pane, click the **Search sets** (folder) icon on the toolbar. The **Search Sets** dialog displays.
2. Click the X icon to the right of the search set you want to delete. The search set is deleted. The search queries associated with that search set are updated to reflect they are no longer associated with the search set that was deleted.

3. Click **CLOSE**. The **Search Request** pane refreshes to show the updated queries.

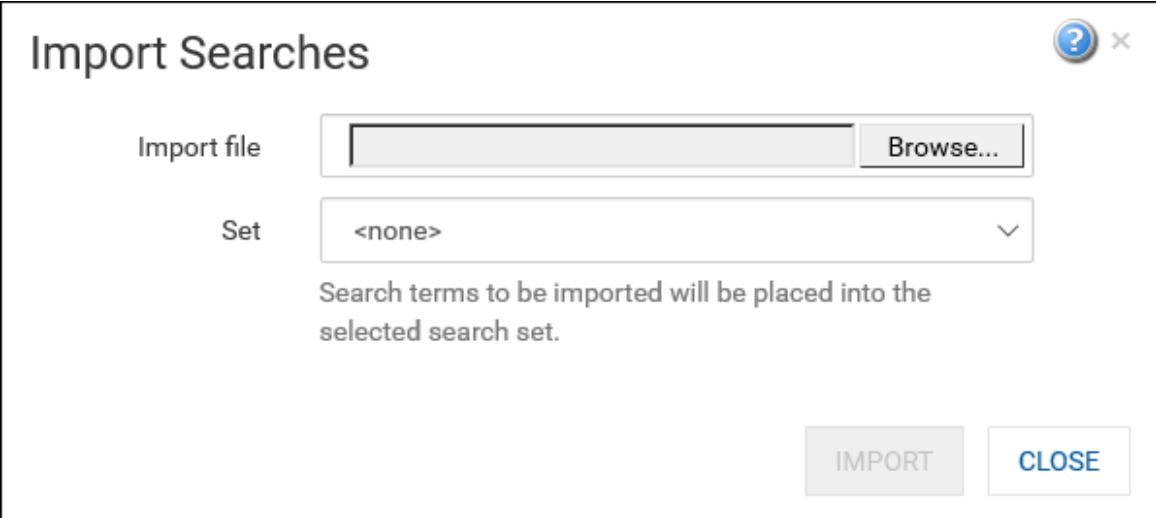
### *Importing and Exporting Searches*

## **Importing Search Queries**

Search queries can be imported from a line-delimited .txt file. Up to 5000 search queries can be imported at one time. During the import, you can designate whether or not the queries are imported into a search set.

Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane, click the down arrow (Import searches) icon on the toolbar. The **Import Searches** dialog displays.



**Import Searches**

Import file

Set

Search terms to be imported will be placed into the selected search set.

2. Click **Browse** to open a file explorer window.
3. From the explorer, navigate and select the .txt file containing the searches you want to import. Click **Open**.
4. The file name selected is added to the **Import file** field.

5. Optionally you can select a search set to associate with the imported searches by selecting one in the **Set** drop down.
6. Click **IMPORT**. The search queries defined in the file are imported. A message displays showing how many searches were imported.
7. Click **CLOSE**. The Import Searches dialog closes and the imported search queries are added to the list in the **Search Request** pane.



If there are duplicate search queries in the line-delimited .txt file you are importing, only one instance of the duplicate search query will be imported. If duplicate search queries are identified in the .txt file, the following message is displayed after the import completes:

*Search term import complete, [# of search queries] search terms were imported. [# of duplicate search queries] duplicate search terms were detected and not added.*



You can import the same search multiple times into the same case. This means that if the .txt file you are importing contains a search that already exists in the case, the import will add the duplicate search query to the case. For example, if you import the same .txt file three times into a case, there will be three instances of each search query from the .txt file added to the case.

## Exporting Search Queries

Search queries can be exported from CloudNine™ Explore Web to a line-delimited .txt file. Only the user-entered search terms associated with the query are exported. Search names, search sets, and filters assigned to a search query are not exported. Empty search queries are also not exported.

If there are duplicate search queries in the case, only one instance of the search query will be exported to the .txt file.

Starting from the **SEARCH** page for a case:

1. In the **Search Request** pane, click the up arrow (Export searches) icon on the toolbar.
2. Depending on the web browser you are using, you will see a prompt asking what you want to do with the generated search export file (named Exported search terms.txt).
3. Based on your preference, **Save** or **Open** the file.

### ***Search Analysis***

The Search Analysis feature in CloudNine™ Explore Web analyzes a set of search queries and provides information about Unique Documents and Frequently Hit Documents.



CloudNine Explore Web

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DASHBOARD FILTERS SEARCH EXPLORE REVIEW

**Search Analysis**

← 📄

**Unique Documents**

ID	Search	Count	Family Count	Size MB
2	EmailFiles	2	2	0.1
3	Custodian D	4	4	0.7
1005	Custodian A ...	26	333	5.6

**Frequently Hit Documents**

Search Hit Count	Count	Size MB
2	3	2.2

## Performing a Search Analysis

Starting from the **SEARCH** page for a case:

1. Select one or more search queries using the check boxes on the left in the **Search Request** pane.
2. Click the Search Analysis (bar graph) icon above the search list in the **Search Request** pane.
3. The **Search Request** pane is replaced by the **Search Analysis** pane on the left. The information displayed is split into two sections. Each selected query is listed in the **Unique Documents** section with this information:

<b>Unique Documents section columns</b>	
<b>C o l u m n</b>	<b>Description</b>
<b>I D</b>	The unique search query ID.
<b>S e a r c h</b>	Search query name (or text if the name is empty)
<b>C o u</b>	Count displays the number of case results returned that

Unique Documents section columns	
<b>n t</b>	were hit by ONLY this search query out of the set of queries that were selected for the Search Analysis.
<b>F a m i l y C o u n t</b>	Family Count displays the number of families returned for the search results that were hit by ONLY this search query out of the set of queries that were selected for the Search Analysis.
<b>S i z e M B</b>	The sum of the file sizes of the unique documents in each search. The Size MB value is calculated using family size.

4. Along with **Unique Documents** information, **Frequently Hit Documents** information is displayed:

<b>Frequently Hit Documents section columns</b>	
<b>C o l u m n</b>	<b>Description</b>
<b>S e a r c h H i t C o u n t</b>	The number of compared search queries containing the same document(s) in the search results.
<b>C o u n t</b>	After comparing the selected saved search queries, the number of case documents returned for the search results that contain more than one of the

Frequently Hit Documents section columns	
	selected search terms.
<b>S</b> <b>i</b> <b>z</b> <b>e</b> <b>M</b> <b>B</b>	The sum of the file sizes of all the documents for all searches selected for the Search Analysis.

5. Select a row from either the **Unique Documents** or the Frequently Hit Documents to see the list of associated files in the document list pane in the center.
6. Select a document from the document list pane to review that document in the document details pane on the right.
7. Click the Return to Saved Searches List icon at the top right of the **Search Analysis** pane to return to the **Search Request** pane.

## Explore

The **EXPLORE** page allows you to further manipulate existing searches to refine and analyze your result sets. You can also analyze the entire data set without first selecting a search.

The **EXPLORE** page consists of three panes:

- **Selected criteria** pane - used to refine search results.
- **Document List** pane - used to view the results based on the refinements selected.
- **Document Details** pane - displays the file information for the file currently selected in the document list pane.



Access to features and functionality in CloudNine™ Explore Web is dependent on your role in the system. All roles have access to the **EXPLORE** page, but read-only and standard access users cannot use the **EXPLORE** page to download or tag documents.

## Selected Criteria Pane Details

The Selected criteria pane is used to define and run a search query against the case's filtered documents. You can run searches on the EXPLORE page without

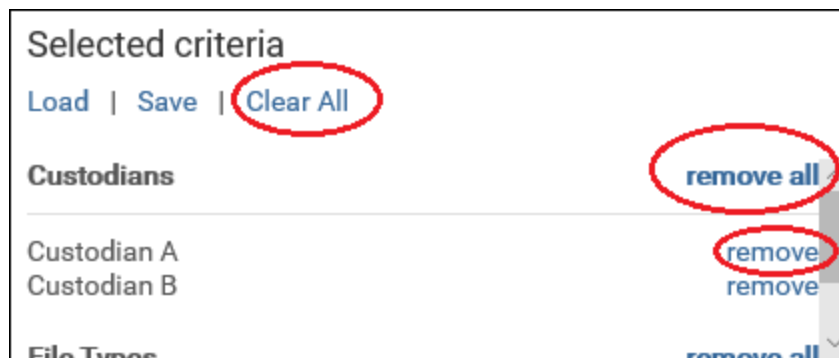
entering a search term, date range, or selecting any criteria. If you run a search without entering a search term, date range, and without selecting any criteria, all filtered documents in the case will be returned in the result list after you click **GO!**.

When searches are run on the EXPLORE page, CloudNine™ Explore Web treats the items you select as AND phrases in the search. For example, if you enter a search term and a date range, the results will include all filtered documents in the case containing both the search term and the date range.

When multiple criteria are selected for the same type, CloudNine™ Explore Web treats the selected criteria as OR phrases in the search. For example, if you select both **Text File** and **MS Outlook Message** under **File Types**, CloudNine™ Explore Web will search for all filtered documents in the case that are either text files or Microsoft Outlook message files.

## Selected Criteria

As you select criteria on the **EXPLORE** page, the items selected will appear at the top of the **Selected criteria** pane. You can remove an individual selection using the **remove** link to the right of the item, remove multiple selections of the same type using the **remove all** link next to the criteria type, or remove all criteria using the **Clear All** link at the top of the panel.



## Search Box

Use the Search Term field to enter any keywords or search query you want to include in your search on the **EXPLORE** page. You can clear the search term from the search results by deleting the text in the search box and then clicking **GO!** to update the search results.

## Date Range

A date range can be added to a search on the **EXPLORE** page using the start date and end date boxes located below the search box. Type a date directly in the start and/or end date fields, or click within the field to select a date from a pop-up calendar. The start date box defaults to the earliest sent date or start date identified in the case's documents, and the end date defaults to the latest sent date or end date identified in the case's documents.

The date range entered on the **EXPLORE** page only looks for date range matches within the case's filtered documents. Documents excluded by the case filters are excluded from the search, including date ranges in a search query. Just like date range filters on the **FILTERS** page, date ranges entered on the **EXPLORE** page search the sent date for e-mail messages and the start and end dates for calendar items and e-documents, if applicable.

You can clear the date range from the search results by selecting the date text in the start date and end date boxes, deleting the date text, and then clicking **GO!** to update the search results.

## Include Items Without Dates

The **Include items without dates** check box determines whether documents without dates are included in the search results on the **EXPLORE** page.

A document without a date means that the document itself and the family it is part of does not have any meaningful dates. Meaningful dates include metadata from the files such as a create date inside a PDF or a sent date in a Microsoft Outlook



email message, but not file system dates. If an attachment in a document family does not contain a date, it may still be considered to have a date if one or more documents in its document family contains a date.

## GO!

Click the **GO!** button to run a search based on the current criteria on the **EXPLORE** page.

## Search Criteria

Fine tune your searches on the **EXPLORE** page by selecting specific criteria. The following criteria types are available for selection:

- **Custodians** — select from the list of custodians in the case.
- **Sources** — select from the list of document sources in the case.
- **Import Sessions** — select one or more specific import sessions in the case.
- **Saved Searches** — choose one or more saved searches in the case.
- **Exports** — choose from the list of export sets in the case.
- **File Types** — select one or more types of files available in the case.
- **Document Types** — Choose whether you are searching for e-documents or email messages.
- **Conversants** — choose from the list of email addresses of the email senders and recipients in the case.

Clicking on a criteria type displays a dialog containing the available selections for that criteria type. For Conversants, enter in a few characters to narrow down the list of email addresses before seeing a selection list.

After selecting one or more items from an individual criteria dialog, select **SHOW RESULTS**. The dialog will close and the **Selected criteria** pane will update to reflect your selections.

## **Document List Pane**

The document list pane in the center of the **EXPLORE** page is used to view the search results for searches run from the **Selected criteria** pane. Clicking a file in the document list will display the file's information in the document details pane. At the top of the document list pane is the Total Documents field, showing the total number of documents returned for the search.

You can scroll through the document list to see additional details for each document. A paperclip icon displays to the left of files that have attachments or embedded files. A down arrow and Family is displayed below the document details for documents that are part of a family. Click the Family drop down to view a list of attached or embedded files.

Click the Tag Documents icon at the top right of the document list and the Bulk Tagging dialog displays allowing you to apply tags to the results list. For more information, see **Tagging**.

The navigation bar at the bottom of the document list pane displays the number of pages of results, and allows you to navigate through each page of results.

## **Document Details Pane**


The document details pane on the right of the **EXPLORE** page displays contents and details for the file currently selected in the document list pane. **Last Viewed** displays the date and time the file was last viewed by the current user in Explore Web.


If the text for a document detail is long, such as the To or CC field, only the first line of the field is displayed with an ellipsis at the end. You can click on the field to display the full field value.


If the extracted text exceeds display limit for the document details pane, a message stating **Document text truncated due to length** is displayed along with a **See all** link. Click the link to display all of the file's extracted text in a separate browser window.



The document details toolbar has the following features:


Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
Feature	N a m e	Description			

Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
	Vi e w e r	Opens the document details pane information in a separate browser window. The separate browser window is synchronized with CloudNine™ Web. If you select another document in the document list pane on the <b>EXPLORE</b> page, the separate	√	√	√



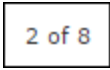
Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
		browser window displays the newly selected document.			
	E m a i l t h r e a d	Enabled if the currently selected file in the document list pane is associated with an email thread. Opens the <b>Email Thread Viewer</b> . For more	√	√	√

<b>Document Details Pane Toolbar features</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>
		information see <a href="#">Viewing Email Threads</a> .			
	Near-duplicate	Enabled if the currently selected file in the document list pane is associated with near-duplicate files. Opens the <b>Near Duplicate Document Viewer</b> . For	√	√	√

<b>Document Details Pane Toolbar features</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>
		more information see <a href="#">Viewing Near Duplicates</a> .			
 or 	Tag	Opens the <b>Tagging</b> dialog, where you can add or remove tags from the document. Blue indicates the document has been tagged, gray indicates		√	√

<b>Document Details Pane Toolbar features</b>			<b>R e a d - o n l y</b>	<b>S t a n d a r d a c c e s s</b>	<b>R e v i e w m a n a g e r</b>
		the document has not been tagged.			
	D o w n l o a d d o c u m e n t	Downloads a copy of the corresponding native file to the browser downloads location. Only files that are 2 GB or less can be downloaded.		√	√



Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
	e n t				
	Pr e v i o u s	Navigate to the previous search hit in the document.	√	√	√
	N e x t	Navigate to the next search hit in the document.	√	√	√
	C u r r e	Displays the currently displayed search	√	√	√

Document Details Pane Toolbar features			R e a d - o n l y	S t a n d a r d a c c e s s	R e v i e w m a n a g e r
	nt a n d to ta l se ar ch hi ts	hit in the current file, and total number of search hits found in the file's extracted text (including hits outside the displayed truncated text).			

The bottom of the document details pane has four tabs with additional information for the currently selected file, if applicable.

## Email Thread

Email Thread (8)				Near Dupes (7)	Duplicates	More Metadata
		Subject	From	Date		
		Re: Enron North America GISB	Stacy E Dickson	3/12/2001		
		> Enron North America_GISB.doc		3/9/2001		
		> Word Document.doc		12/6/1996		
		> Enron North America_US spec pr...		3/9/2001		
		Re: Enron North America GISB	Stacy E Dickson	3/12/2001		

If the current file has an email thread associated with it, the **Email Thread** tab will display a number indicating how many documents are in the email thread. The email thread list displays the email threads associated with the file currently selected on the Search pane.

Email Thread List Columns	
C o l u m n	Description
I n c l	The  icon is displayed for inclusive email messages. The

## Email Thread List Columns

<b>u s i v e</b>	<p>icon is displayed for email messages that are not inclusive.</p> <p>In CloudNine™ Explore Web, email messages are flagged as inclusive if they contain the email message thread's entire conversation. In the simplest case, this will be the last message in the email thread, because it will quote all the previous messages. Note that inclusiveness is calculated based on message bodies and does not consider metadata, such as an email's subject.</p>
<b>A t t a c h m e n t</b>	<p>The second column displays an icon if there are attachments associated with the email thread.</p>
<b>S u b j e c t</b>	<p>For emails, <b>Subject</b> displays the email message's subject. For attachments, <b>Subject</b> displays the attachment's file name. Each subject or file name is a link. Clicking a <b>Subject</b> link opens the email message or attachment in the document details pane.</p>

## Email Thread List Columns

<b>F r o m</b>	For email messages, <b>From</b> displays the email message sender. For attachments, <b>From</b> is blank.
<b>D a t e</b>	For email messages, <b>Date</b> displays the email message Sent date. For e-doc attachments, <b>Date</b> contains the Created date. Place your mouse pointer over the date to view the date and time associated with the email message or attachment.

## Near Dupes

Email Thread (8)		Near Dupes (7)		Duplicates	More Metadata
Name	Last Viewed	Similarity	Date	Custodian	File Type
Enron Nort...	4/7/2015 3:08 PM	100	2001	Dickson, St...	MS Word 9
Potlatch.doc	11/9/2014 1:21 PM	88.5	2001	Dickson, St...	MS Word 9
Potlatch.doc	--Never--	88.5	2001	Dickson, St...	MS Word 9
basecontr...	--Never--	88.5	2000	Dickson, St...	MS Word 9

If the current file has near duplicates associated with it, the **Near Dupes** tab will display the number of near duplicates. The near duplicate list displays details for the near duplicate files.

Near-Duplicate List Columns	
Column	Description
Name	Displays the file name for each near-duplicate file associated with the file currently displayed in the document details pane. Each file name is a link. Clicking a link in the <b>Name</b> column opens the newly selected file in the document details pane.
Last Viewed	Displays the date and time the file was last viewed in CloudNine™ Explore Web by the current user. If the file has not been viewed, <b>Never</b> is displayed for the file.
Similarity	Percentage of similarity between the currently selected file (master file) and the near duplicate file.

Near-Duplicate List Columns	
<b>t y</b>	
<b>D a t e</b>	Year the file was created. Hover over the year to view the date and time range associated with the file. The first date is the date the file was created, based on the file's Created field, and the second date is the date the file was last modified, based on the file's LastMod field.
<b>C u s t o d i a n</b>	The custodian for the near-duplicate file.
<b>F i l e T y p e</b>	The file type of the near-duplicate file.

## Duplicates

The **Duplicates** tab displays a list of files identified as duplicates of the file currently displayed in the right hand pane of the **EXPLORE** page. The tab itself displays the number of duplicates, if applicable.

The duplicate list displays details for the duplicate files.

Duplicate list columns	
Column	Description
Name	Displays the file name for each duplicate file associated with the file currently displayed in the document details pane. Each file name is a link. Clicking a link in the <b>Name</b> column opens the file in the document details pane.
Last Viewed	Displays the date and time the file was last viewed in CloudNine™ Explore Web by the current user. If the file has not been viewed, <b>Never</b> is displayed for the file.



Duplicate list columns	
<b>D a t e</b>	Year the file was created. Hover the year to view the date and time range associated with the file. The first date is the date the file was created, based on the file's Created field, and the second date is the date the file was last modified, based on the file's LastMod field.
<b>C u s t o d i a n</b>	The custodian for the duplicate file.
<b>F i l e T y p e</b>	The file type of the duplicate file.

## More Metadata

The **More Metadata** tab displays additional metadata for the file currently displayed in the right hand pane of the **EXPLORE** page.

## Back and Previously Viewed

At the top of the document details pane are two additional items. The **BACK** button opens the last document you viewed on the EXPLORE page. The **Previously Viewed** list contains a list of documents you viewed on the EXPLORE page in the last 24 hours.

### *Viewing Documents*

## Viewing Documents on the EXPLORE Page

In CloudNine™ Explore Web, you can select one or more saved searches and run them with one click. When you run multiple search queries, each search query is run individually against the filtered case files. Once each query finishes running, you can click the saved query to view the search results in the document list pane.

Starting from the **EXPLORE** page for a case:

1. In the **Selected Criteria** pane, enter the keyword(s) or search query you want to search for in the **Search Term** box.
2. Optionally specify a date range using the two calendar fields below the **Search Term** box. The date range only looks for date range matches within the case's filtered documents.
3. If you want to include documents without dates in the search results, select the **Include items without dates** check box.
4. Optionally add one or more search criteria using the items at the bottom of the **Selected Criteria** pane (**Custodians, Sources, Import Sessions, Saved Searches, Exports, File Types, Document Types, Conversants**).

5. When you are done configuring your search, click **GO!** to run the search. The search results are displayed in the document list pane.
6. Click a file in the document list pane. The document details pane displays information for the file selected.
7. If you entered specific search terms, you can use the up and down arrows to move through highlighted search hits in the file content.
8. Use the tabs at the bottom of the document details pane to see **Email Thread**, **Near Dupe**, **Duplicates**, and **More Metadata** information.
9. You can use the Tag document icon on the toolbar to tag your result list, if needed.

### ***Email Thread Viewer***

Email threads are email messages belonging to the same email conversation thread. An email thread includes the original email message, all of the subsequent replies pertaining to the original email, and any attachments to the email messages.

The email thread analysis is run for a case in CloudNine™ Explore. You can then view and analyze email threads on the **EXPLORE** tab using the Email Thread Viewer in CloudNine™ Explore Web.

For more information, see **Near-Duplicate & Email Thread Analysis**.

## **Email Thread Viewer**

Starting from the **EXPLORE** page for a case, using the existing result set, or any configured search you want, display a document in the document details pane on the right that is part of an email thread (identified by having a number displayed on the **Email Thread** tab). From there you can click the View email thread icon from the toolbar at the top of the document details pane. The **Email Thread Viewer** displays.

### Email Thread Viewer ✕

#### Email Thread Items

- ✉ Mypay (Cognizant) </O=COGNIZA...  
Reminder : Investment ... 1/7/2010
- 📎 > Untitled Attachment
- 📎 > Untitled Attachment
- ✉ > Mypay (Cognizant) </O=COGNI...  
FW: Reminder : Investm... 1/11/2010
- 📎 >> Untitled Attachment
- 📎 >> Untitled Attachment
- ✉ > Mypay (Cognizant) </O=COGNI...  
FW: Reminder : Investm... 1/11/2010
- 📎 >> Untitled Attachment
- 📎 >> Untitled Attachment

FW: Reminder : Investment proofs Submission

Last Viewed: 1/20/2020 2:51 PM

---

**Mypay (Cognizant)** </O=COGNIZANT/OU=CZTINCHE/CN=RECIPIENTS/CN=PAYROLL> on behalf of Mypay (Cognizant)

**Sent:** 1/11/2010 9:32 AM (UTC) Coordinated Universal Time

**To:** Cognizant ALL (INDIA) <CTSALLIND@cognizant.com>

**Attachments:** Untitled Attachment; Untitled Attachment

Dear Associate,

We refer to our earlier mails to online submission of Investment proofs.

We would like to reiterate that you will be able to upload the documents only after you update all the details and click the SUBMIT button.

Regards  
Payroll Team

---

**From:** Mypay (Cognizant)

**Sent:** Thursday, January 07, 2010 10:59 AM

**To:** Cognizant ALL (INDIA)

**Subject:** Reminder : Investment proofs Submission

**Importance:** High

Dear Associate,

We have facilitated online submission of investment proofs required for income tax computation

Filename: FW Reminder Investment proofs Submission.msg

Sent: 1/11/2010 9:32 AM (UTC) Coordinated Universal Time

Custodian: Custodian A

Type: MS Outlook Message

Size: 739.50 KB



Msg Class: IPM.NOTE


Tags: TagA

## Email Thread Items

The top left pane displays the **Email Thread Items**. This lists the email messages and email attachments associated with the file currently selected on the **EXPLORE** page. The email messages and attachments are displayed in a tree view to show the order and relationships within the email thread. There are four columns in the display:

Email Thread Items Columns	
Column	Description

<b>Email Thread Items Columns</b>	
<b>Inclusive Indicator</b>	<p>Indicates whether the file is an email message and whether the email message is inclusive.</p> <p>The  icon is displayed for inclusive email messages. The  icon is displayed for email messages that are not inclusive.</p> <p>In CloudNine™ Explore and CloudNine™ Explore Web, an email message is flagged as inclusive if the email message contains the email message thread's entire conversation. In the simplest case, this will be the last message in the email thread, because it will quote all the previous messages.</p> <p>Note that inclusiveness is calculated based on message bodies and does not consider metadata, such as an email's subject.</p>
<b>Attachment</b>	<p>This column is only displayed on the Email Thread tab if there are attachments associated with the email thread. For each attachment, the attachment icon</p>

Email Thread Items Columns	
	 is displayed in the Attachment column.
<b>File Information</b>	For email messages, displays the From and Subject fields. For email attachments, the file name is displayed.
<b>Tag</b>	If a tag is applied to an email message or attachment in the list, a blue tag is displayed. If no tag is applied to an email message or attachment in the list, a gray tag is displayed. Click the tag icon to view the <b>Tagging</b> dialog and modify the file's associated tags. You can also apply tags to all files in the list by clicking the tag icon in the list column header to access the <b>Bulk Tagging</b> dialog.

## Document Metadata

The bottom left pane displays document metadata. This metadata includes a Tags field, that displays all the tags currently applied to the document.

## Document Details

The right pane displays file contents for the currently selected document from the **Email Thread Items** list. You can use the Download document icon at the top of the pane to download the corresponding native file.

### ***Near Duplicate Document Viewer***

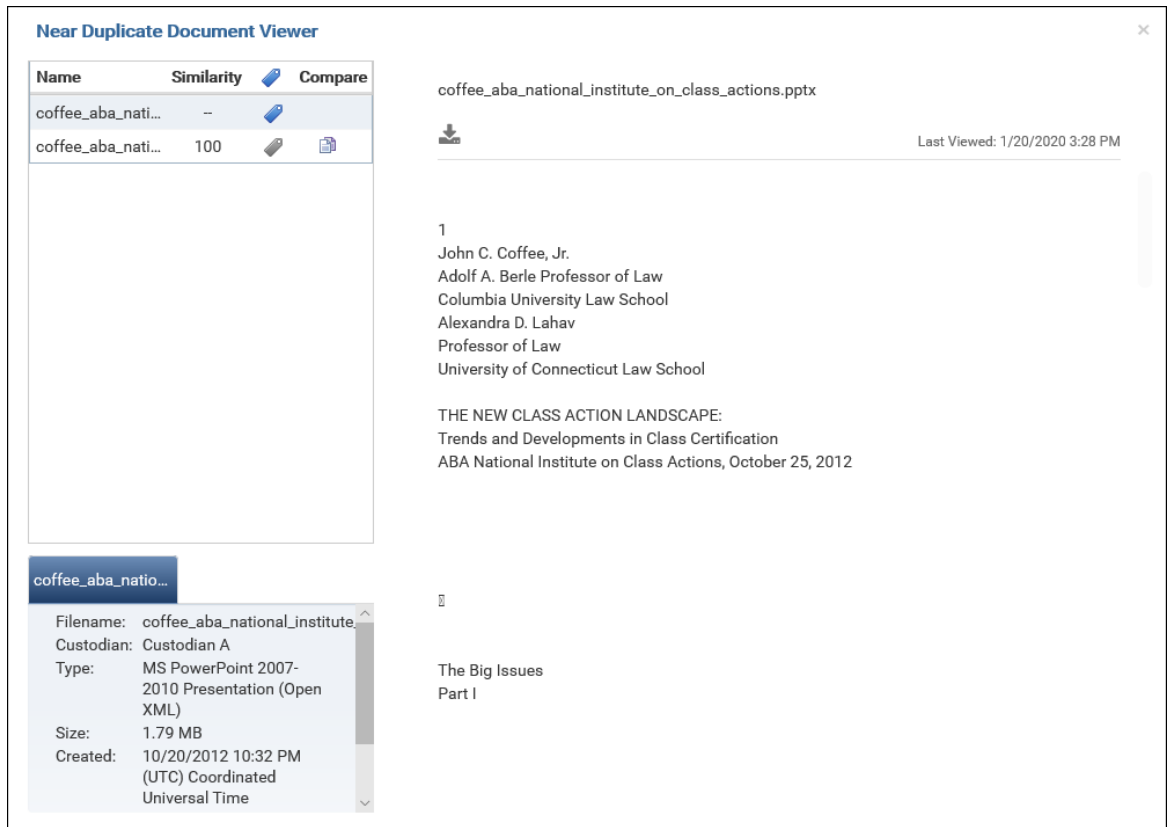
Near duplicates are documents that have duplicate content, but are not necessarily exact duplicates of each other.

The near-duplicate analysis is run for a case in CloudNine™ Explore. You can then view and compare near-duplicate documents on the **EXPLORE** tab using the Near Duplicate Document Viewer in CloudNine™ Explore Web. The near-duplicate analysis in CloudNine™ Explore identifies documents with redundant text to help ensure you are only processing documents essential to the case. The near-duplicate analysis includes analyzing documents without text. For email messages, the near-duplicate analysis only compares the email message body content between email messages. It does not compare email headers.

For more information, see **Near-Duplicate & Email Thread Analysis**.

## **Near Duplicate Document Viewer**

Starting from the **EXPLORE** page for a case, using the existing result set, or any configured search you want, display a document in the document details pane on the right that has near-duplicates (identified by having a number displayed on the **Near Dupes** tab). From there you can click the View near duplicates icon from the toolbar at the top of the document details pane. The **Near Duplicate Document Viewer** displays.




## Near-Duplicate List

The top left pane displays a list of near-duplicate documents associated with the file currently selected on the **EXPLORE** page. When comparing, the master document is the file that was selected on the **EXPLORE** page and is displayed at the top of the list. There are four columns in the list:

Near-Duplicate List Columns	
Column	Description



Near-Duplicate List Columns	
<b>Name</b>	File name of the file in the near-duplicate family.
<b>Similarity</b>	Percentage of similarity between the near-duplicate document and the master document.
<b>Tag</b>	If a tag is applied to a document in the near-duplicate list, a blue tag is displayed. If no tag is applied to a document in the near-duplicate list, a gray tag is displayed. Click the tag icon to view the <b>Tagging</b> dialog and modify the file's associated tags. You can also apply tags to all files in the list by clicking the tag icon in the list column header to access the <b>Bulk Tagging</b> dialog.
<b>Compare</b>	<p>Click the Compare icon to bring up the associated document comparison pane and compare near-duplicate documents. See the Comparison Pane section below for more details.</p> <p>to compare a document with the document currently selected in the near-duplicate list pane. When you click the near duplicate icon for a document in the list, the Compare icon  is</p>

Near-Duplicate List Columns	
	displayed next to the near duplicate icon to indicate which file is currently being compared with the selected document.

## Document Metadata

The bottom left pane displays document metadata. This metadata includes a Tags field, that displays all the tags currently applied to the document.

## Document Details

The right pane displays file contents for the currently selected document from the **Email Thread Items** list. You can use the Download document icon at the top of the pane to download the corresponding native file.

## Comparison Pane

You can compare near-duplicate documents with the master document by clicking the Compare icon, next to a near-duplicate document. When you click the comparison icon, the document details pane is replaced by the comparison pane. The comparison pane displays the contents of the document you selected along with highlighting the differences between the selected document and the master document.

In the comparison details pane:

- Underlined blue text indicates added text. ([Example](#))
- Red text with a strike through indicates deleted text. ([Example](#))
- Plain black text indicates unchanged text. (Example)

A caution icon (exclamation mark) will be displayed in the upper right corner of the comparison pane if you are comparing one or more truncated documents. Comparisons for truncated documents are only displayed for the text up to the point where the truncation occurs.

**Near Duplicate Document Viewer**

Name	Similarity	Compare
coffee_aba_nati...	--	
coffee_aba_nati...	100	

0 of 0

Added Deleted Unchanged

1  
John C. Coffee, Jr.  
Adolf A. Berle Professor of Law  
Columbia University Law School  
Alexandra D. Lahav  
Professor of Law  
University of Connecticut Law School





THE NEW CLASS ACTION LANDSCAPE:  
Trends and Developments in Class Certification  
ABA National Institute on Class Actions, October 25, 2012




The Big Issues  
Part I

Filename: coffee\_aba\_national\_institute...  
Custodian: Custodian E  
Type: MS PowerPoint 2007-2010 Presentation (Open XML)  
Size: 1.79 MB  
Created: 10/20/2012 10:32 PM (UTC) Coordinated Universal Time

## Comparison Pane Toolbar

The comparison pane toolbar at the top of the comparison pane is used to navigate between near-duplicate documents and navigate the differences between the near-duplicate documents. The comparison pane toolbar also contains the comparison key for understanding the near-duplicate differences.

<b>Comparison pane toolbar features</b>		
<b>Icon</b>	<b>Name</b>	<b>Description</b>
	Previous Document	Navigates to the previous document in the near-duplicate document list and displays that document in the comparison pane.
	Next Document	Navigates to the next document in the near-duplicate document list and displays that document in the comparison pane.
	First Difference	Navigates to the first difference.
	Previous Difference	Navigates to the previous difference.

Comparison pane toolbar features		
	Current and Total Differences	Indicates the current difference number and the total number of differences.
	Next Difference	Navigates to the next difference.
	Last Difference	Navigates to the last difference.

## Review

The CloudNine™ Explore Web **REVIEW** Dashboard provides you a central location for case reviews.

The information and functionality provided is dependent on your role in CloudNine™ Explore Web and the reviews you have been assigned to. Before a standard reviewer may access reviews for a case, an administrator must assign them to the client and to the case. Administrators are responsible for assigning standard reviewers to individual reviews.



If you do not have access to the REVIEW tab, or do not have access to reviews for a case, contact your CloudNine™ Explore Web administrator.

The screenshot shows the CloudNine Explore Web interface. At the top, there is a navigation bar with 'Cases', 'Administration', and user icons. Below that, the case name 'OmegaJan20' is displayed. The main navigation menu includes 'DASHBOARD', 'FILTERS', 'SEARCH', 'EXPLORE', and 'REVIEW' (which is currently selected). A blue plus icon is visible in the top right corner of the main content area.

The main content area displays '2 Reviews' with a 'Sort options: AZ' dropdown. There are two review cards:

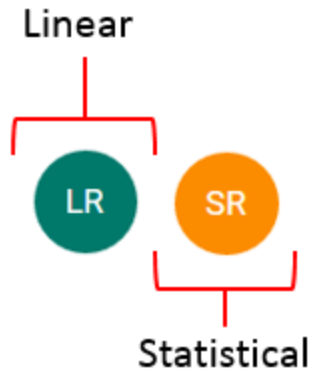
- LR ExcludedLinearReview**: Created on 1/24/2020, Source: Excluded Documents, Documents: 221 in total. Progress: 0% (0 of 221). Estimated Remaining Time: 00H:00M. A 'VIEW DETAILS' link is at the bottom.
- SR InitialReview**: Created on 1/10/2020, Source: Tags, Documents: 611 in total. Progress: 0% (0 of 611). Estimated Remaining Time: 00H:00M. A 'VIEW DETAILS' link is at the bottom.

The footer contains the CloudNine logo, 'Copyright © 2020 Version 7.3', and 'Work Status: Idle'.

There are two types of reviews in CloudNine Explore Web:

- **Linear Review** - The review set can be comprised of all documents or subsets based on search results or other factors. Reviewers can mark each document with one or more tags. The greater number of documents to review, the higher the cost of review in both time and money.
- **Statistical Review** - Explore Web draws a random sample of documents from the document set for review. The sample size is based on requisite confidence level and margin or error. The result of statistical review can help to validate keywords and is an efficient way to conduct early case assessment.

Each review type has its own icon. When a review has been completed, the background on the review card changes to gray.




## Review Dashboard for Review Managers

Click the REVIEW tab to access the Review Dashboard for the case.

Review Dashboard for review managers		
#	Title	Description
1	Case title	The full name of the case
2	Total number of reviews	The total number of reviews for the case.  Note that power reviewer and standard reviewer users' total displayed is the total number of reviews assigned to them, so the

Review Dashboard for review managers		
		review manager total and the power review and standard reviewer totals may be different.
3	Review cards	Information for each review is displayed on a review card. The information displayed is dependent on the type of review and the status of the review.
4	VIEW DETAILS button	Click to access the Review page, which provides details on the review batches.
5	Create a review icon	Hover over the Create a review icon to open a selection of review types. Click the icon for the type of review to create.
6	Sort options button	You can sort the review cards in ascending or



Review Dashboard for review managers		
		<p>descending order by:</p> <ul style="list-style-type: none"><li>• Create date — The date the review was created</li><li>• Review name — Alphabetically by review name</li><li>• Status — State of completion</li></ul> <p>Click the Sort options button and select the sort order. To reverse the order, click and select the same order again.</p>

## Review Cards for Review Managers

### Statistical review card for review managers

Statistical reviews in progress display:

- Review type icon — Indicates the type of review
- Review title — Title of the review is provided next to the review type icon

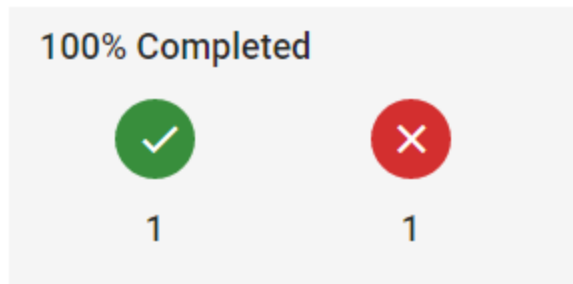
- Create — Date the review was created
- Source — Source of the documents in the review
- Documents — Total number of documents in the review
- Progress bar — Provides a percentage complete, number complete out of the total number, and a graphical representation of the progress. In the progress bar, green indicates documents that have been tagged with the primary review tag, red indicates documents that have been evaluated and not tagged, dark gray indicates documents that have been initially evaluated and require further review, and light gray indicates documents that have not been reviewed yet with the primary review tag.
- Estimated Remaining Time — Approximate amount of time required to complete the review at the current average review speed.
- VIEW DETAILS button — Click to access the Review page. The Review page provides details on the review and review functionality including assign/unassign reviewers, edit review, delete review, and access to the Document Viewer.

Statistical reviews that have been completed display:

- Review type icon — Indicates the type of review
- Review title — Title of the review is provided next to the review type icon
- Create — Date the review was created
- Source — Source of the documents in the review
- Documents — Total number of documents in the review
- Number of documents responsive to the primary tag
- Number of documents not responsive to the primary tag
- VIEW DETAILS button — Click to access the Review page. The Review page provides details on the review. No additional changes may be made to the review when it is completed.

**SR** My Statistical Review

Create 2/23/2016  
 Source Search Results ⓘ  
 Documents 2 in total



[VIEW DETAILS](#)


## Review Dashboard for Standard Reviewers

- Click the **REVIEW** tab to access the Review Dashboard for the case.

The Review Dashboard only displays reviews you have been assigned to. If a review is missing from your Review Dashboard, contact your CloudNine™ Explore Web Administrator and request to be assigned to the review.

Review Dashboard for Standard Reviewers		
#	Title	Description

<b>Review Dashboard for Standard Reviewers</b>		
1	Case title	The full name of the case
2	Total number of reviews	The total number of reviews assigned to you for the case.
3	Review cards	Information for each review is displayed on a review card.
4	VIEW DETAILS button	Click to access the Review page, which provides details on the review batches.
5	ASSIGN TO ME button	Click to assign an available batch to yourself and begin reviewing. When you click ASSIGN TO ME, the Document Viewer is displayed and you can begin reviewing documents immediately.
6	Documents	The total number of documents reviewed across all batches.

Review Dashboard for Standard Reviewers		
	Reviewed	
7	Batches Available	The total number of batches available for assignment in the review.
8	CONTINUE REVIEW button	Click to open the Document Viewer for a batch already assigned to you.
9	Batches Assigned	The total number of incomplete batches currently assigned to you.
10	Sort options button 	You can sort the review cards in ascending or descending order by: <ul style="list-style-type: none"><li>• Create date — The date the review was created.</li><li>• Review type — Alphabetically by review type.</li></ul>

<b>Review Dashboard for Standard Reviewers</b>		
		<ul style="list-style-type: none"><li>• Review name — Alphabetically by review name.</li><li>• Status — State of completion.</li></ul> <p>Click the Sort options button and select the sort order. To reverse the order, click and select the same order again.</p>

## **Review Cards for Power Standard Reviewer Users**

The information displayed by a linear, statistical, and predictive coding review cards is dependent upon the current status of the review and whether any batches have been assigned to you. Reviews in progress show slightly different content than completed reviews.

All linear and statistical review cards show the basic types of information.

- Review type icon — Indicates the type of review
- Review title — Title of the review is provided next to the review type icon.
- Create — Date the review was created
- Source — Source of the documents in the review
- Documents — Total number of documents in the review

- Documents Reviewed — Total number of documents reviewed by all reviewers
- VIEW DETAILS button — Click to access the Review page. The Review page provides details on the review and review functionality appropriate to your role.

If no batches have been assigned to you yet, the review card displays the number of batches available and the ASSIGN TO ME button. Click ASSIGN TO ME to assign a batch to yourself. CloudNine™ Explore Web automatically opens to the Document Viewer screen for the batch you assigned to yourself so that you can immediately begin your review.

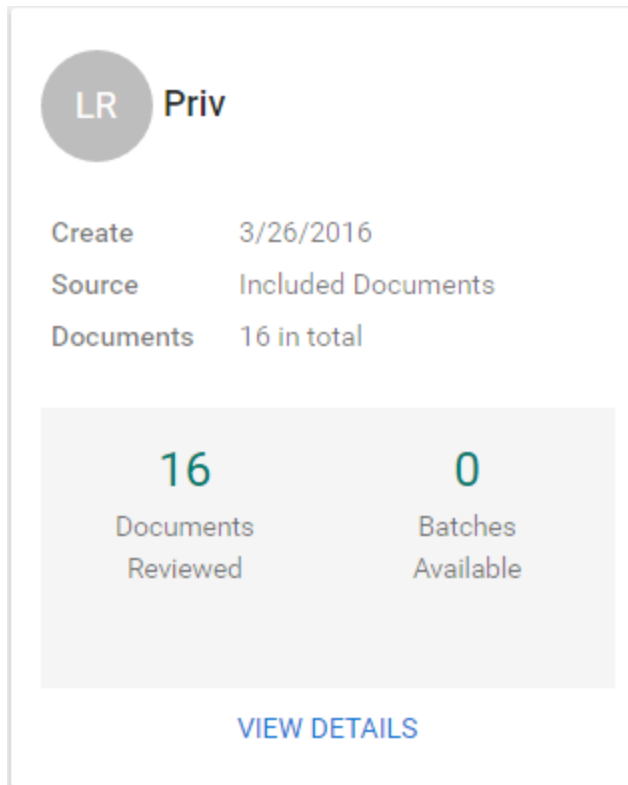
If batches have been assigned to you, the review card displays the number of batches assigned and the CONTINUE REVIEW button. Click CONTINUE REVIEW to automatically open the Document Viewer screen for a batch you are assigned to so that you can immediately continue your review.

Review Type	Batch ID	Create	Source	Documents	Documents Reviewed	Batches Available/Assigned	Action
SR	0325_Sort	3/25/2016	Included Documents	0 in total	0	13	VIEW DETAILS / ASSIGN TO ME
LR	0325_Priv	3/25/2016	Included Documents	100 in total	0	1	VIEW DETAILS / CONTINUE REVIEW

If the review has been completed, the review card has the following differences:

- The review type icon color is gray.
- There are no batches available.

- The ASSIGN TO ME/CONTINUE REVIEW button is gone. Only the VIEW DETAILS button is available.



### ***User Roles for Reviews***

You can access specific features and functionality on the **REVIEW** page based on your assigned role in CloudNine™ Explore Web.

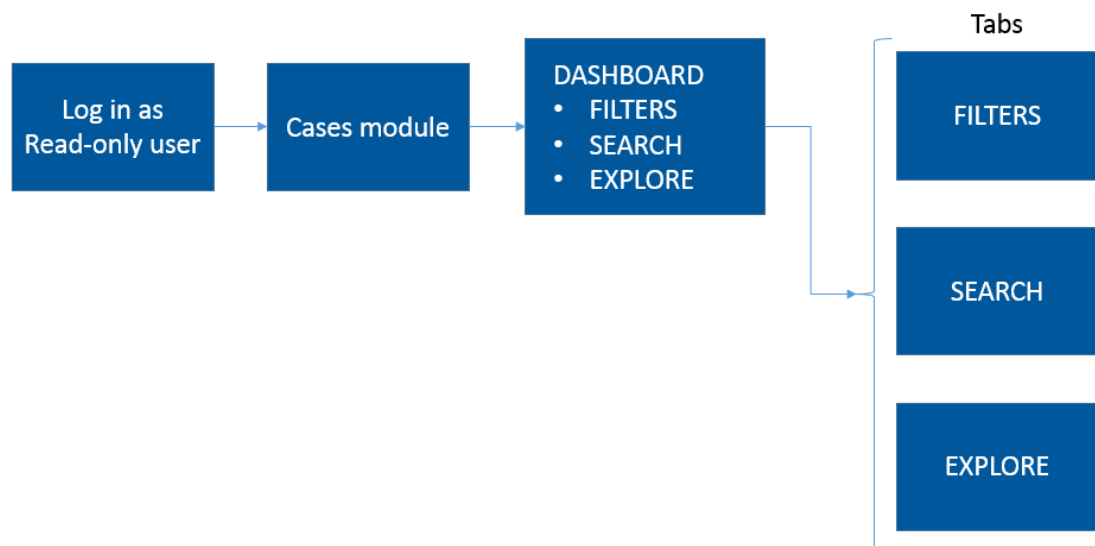
The following list describes the user roles in CloudNine™ Explore Web:

- Read-only - Read-only users are typically users who need access to general information in CloudNine™ Explore Web, but will not be managing or completing reviews in CloudNine™ Explore Web. These are most often high-level employees in your organization who want a high-level overview. As such, they have access to only the following features in the core platform.
  - **Cases** page - only those cases assigned to the user are displayed.
  - **DASHBOARD** page



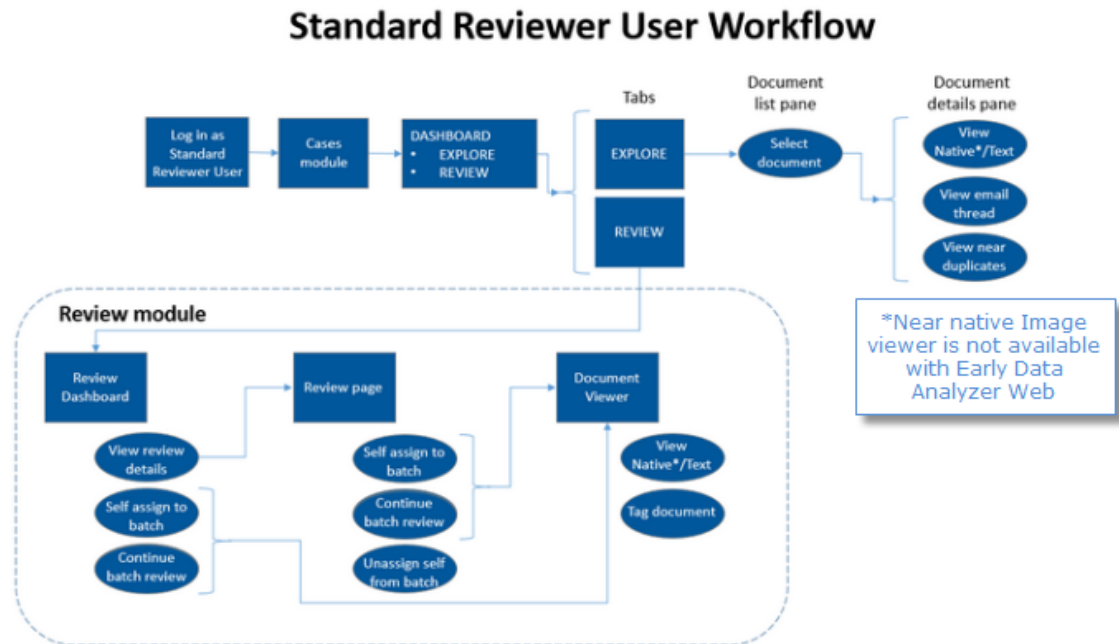
- **SEARCH** page
- **EXPLORE** page

## Read-only User Workflow



- Standard - Standard users are typically the ground-level document reviewers. They have the background and knowledge to complete batch set reviews, but do not yet have the experience necessary to set up and manage reviews. Standard users have access to the following in the core platform:
  - **Cases** page - only those cases assigned to the user are displayed.
  - **EXPLORE** page
  - View native and text from the document details pane and document viewer (The near native viewer must set up by the administrator before you can access it. If it is not set up, only text view is available.)
  - **REVIEW** page
  - Viewing unassigned batch sets
  - Assign batch sets to themselves

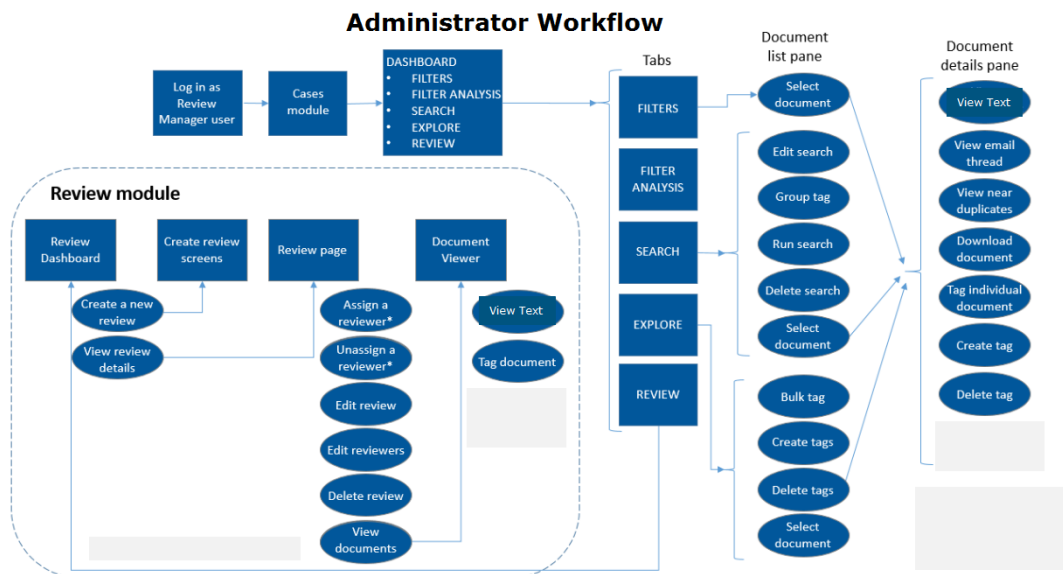
- Unassign themselves from batch sets
- Review and tag batch sets in a review



- Administrator - Administrators have full access to the core platform, including the Administration page in CloudNine™ Explore Web. For more details on administrator tasks see [Administering CloudNine Explore Web](#). Administrators can:
  - Create and maintain users
  - Maintain Active Directory settings
  - Maintain Extensions settings - imaging services, predictive coding, and back-end service settings (as applicable for your installation)
  - Assign cases to users
  - Access the **REVIEW** page - administrators have full access to features and functionality with one exception. They cannot be assigned to reviews or batch sets. This means that they can see and access all cases, reviews, batch

sets, and users, but cannot be assigned as an official document reviewer for reviews or batch sets.

- Create, edit, and delete reviews
- Add and remove additional tags for reviews in progress
- Create batch sets
- Assign reviews and batch sets to others
- Unassign reviews and batch sets to others
- See unassigned batch sets
- Review and tag batch sets



### Creating a Linear Review

Starting from the **REVIEW** page for a case:

1. Hover over the Create new Review (plus sign) icon in the top right corner, then select the Linear Review (LR) icon. The **Create linear review** dialog displays on the **BASICS** page.

The screenshot shows the 'Create linear review' dialog with the 'BASICS' tab selected. It features a 'Review name' text input field with the placeholder 'type your review name'. Below it is a 'Review instructions (Optional)' text area with the placeholder 'Type instructions for reviewers here'. At the bottom right, there are 'CANCEL' and 'CONTINUE' buttons.

2. Enter a **Review name**, and optionally add **Review instructions** for the reviewers. Click **CONTINUE**. The **SOURCE** page displays.

The screenshot shows the 'Create linear review' dialog with the 'SOURCE' tab selected. It features a section titled 'Select the document source' with a list of radio button options: 'All documents' (Total documents: 5075), 'Included documents' (Total documents: 4854), 'Excluded documents' (Total documents: 221), 'Search results', and 'Tags'. The 'Excluded documents' option is selected. At the bottom right, there are 'CANCEL' and 'CONTINUE' buttons.

3. Select the source for the documents to be included in the review:

Use this source:	To create a review from these documents:
<b>All documents</b>	All documents in the case.
<b>Included documents</b>	Documents that were included by filters.
<b>Excluded documents</b>	Documents that were excluded by filters.
<b>Search results</b>	Search results from one or more saved searches. You should only select <b>Search results</b> if you have searches in the current case and those searches are up-to-date. Once you select the <b>Search results</b> option, a list displays where you can select one or more searches to include in the review. To include family

4. Click **CONTINUE**. The **BATCHING** page displays.

**Create linear review**

BASICS SOURCE **BATCHING** TAGS REVIEWERS

Maximum batch size

100

Batching method

Custodian Approximate batches: 1

Oldest to newest  Newest to oldest

Document created date Approximate batches: 1

CANCEL CONTINUE

5. Enter a **maximum batch** size. This can be a number between 50 and 500.

6. Select a **Batching method**. There are two choices:

- **Custodian** - the review documents will be organized by Custodian. All of the available documents associated with one custodian are reviewed, followed by documents from the next custodian, and so forth. If you select **Custodian**, you then need to select either **Oldest to newest** or **Newest to oldest** to determine what order the custodians will be presented in the review.
- **Document created date** - the review documents will be organized by creation date. You then need to select either **Oldest to newest** or **Newest to oldest**.

7. Click **CONTINUE**. The **TAGS** page displays.

The screenshot shows a dialog box titled "Create linear review" with five tabs: "BASICS", "SOURCE", "BATCHING", "TAGS" (which is selected and underlined), and "REVIEWERS". Below the tabs, there are two sections. The first section is labeled "Add or select the primary tag for review" and contains a text input field with a dropdown arrow on the right. The second section is labeled "Define additional tags for review" and contains two radio button options: "Do not show additional tags" (which is selected) and "Show the following additional tags". At the bottom right of the dialog, there are two buttons: "CANCEL" and "CONTINUE".

8. In the **Add or select the primary tag for review** drop down, select the primary tag to use for this review. You can also type into the box and **ADD** a new tag to use.
9. If you would like to use additional tags in the review, select **Show the following additional tags**. Then select the additional tags you want in the box that displays.
10. Click **CONTINUE**. The **REVIEWERS** page displays.
11. Select reviewers to assign to the review. Click **CREATE**. The linear review is created. The assigned reviewers will see a review card for this new review when they open the case in CloudNine™ Explore Web.

### ***Creating a Statistical Review***

Starting from the **REVIEW** page for a case:

1. Hover over the Create new Review (plus sign) icon in the top right corner, then select the Statistical Review (SR) icon. The **Create statistical review** dialog displays on the **BASICS** page.



### Create statistical review

**BASICS** SOURCE SAMPLING BATCHING TAGS REVIEWERS

Review name

Review instructions (Optional)

2. Enter a **Review name**, and optionally add **Review instructions** for the reviewers. Click **CONTINUE**. The **SOURCE** page displays.

### Create statistical review

BASICS **SOURCE** SAMPLING BATCHING TAGS REVIEWERS

Select the document source

<input type="radio"/>	All documents	Total documents: 5075
<input checked="" type="radio"/>	Included documents	Total documents: 4854
<input type="radio"/>	Excluded documents	Total documents: 221
<input type="radio"/>	Search results	
<input type="radio"/>	Tags	

3. Select the source for the documents to be included in the review:

<b>U s e t h i s s o u r c e:</b>	<b>To create a review from these documents:</b>
<b>All d o c u m e n t s</b>	All documents in the case.
<b>In c l u d e d d o c u m e n t s</b>	Documents that were included by filters.

<b>Ex c l u d e d</b>	Documents that were excluded by filters.
---	---

4. Click **CONTINUE**. The **SAMPLING** page displays.

**Create statistical review**

BASICS SOURCE **SAMPLING** BATCHING TAGS REVIEWERS

Sampling method

Specify confidence level and margin of error Sample documents: 1168

Confidence level

Margin of error

Specify a fixed size

5. Make a selection for **Sampling method**:

- **Specify confidence level and margin of error.** Use this option if you want your review to target a specific confidence level and margin of error. Using this method, the number of documents that must be reviewed will depend upon these targets, factored against the number of documents based on the source selection. Confidence level can be set to 95% or 99%. All other factors held equal, the higher the confidence level, the greater number of documents to review. Margin or error can be set to:  $\pm 5\%$ ,  $\pm 2.5\%$ , or  $\pm 1\%$ . All other factors held equal, the lower the margin of error, the greater number of documents to review.
- **Specify a fixed size.** Use this option if you want your review to sample a fixed number of documents. If you select this option, you need to enter the number of documents to review.

6. Click **CONTINUE**. The **BATCHING** page displays.

Create statistical review

BASICS SOURCE SAMPLING **BATCHING** TAGS REVIEWERS

Maximum batch size

100

Batching method

Custodian Approximate batches: 12

Oldest to newest  Newest to oldest

Document created date Approximate batches: 12

CANCEL CONTINUE

7. Enter a **maximum batch size**. This can be a number between 50 and 500.
8. Select a **Batching method**. There are two choices:
  - **Custodian** - the review documents will be organized by Custodian. All of the available documents associated with one custodian are reviewed, followed by documents from the next custodian, and so forth. If you select **Custodian**, you then need to select either **Oldest to newest** or **Newest to oldest** to determine what order the custodians will be presented in the review.
  - **Document created date** - the review documents will be organized by creation date. You then need to select either **Oldest to newest** or **Newest to oldest**.
9. Click **CONTINUE**. The **TAGS** page displays.

**Create statistical review**

BASICS SOURCE SAMPLING BATCHING **TAGS** REVIEWERS

Add or select the primary tag for review

Define additional tags for review

Do not show additional tags

Show the following additional tags

CANCEL CONTINUE

10. In the **Add or select the primary tag** for review drop down, select the primary tag to use for this review. You can also type into the box and **ADD** a new tag to use.
11. If you would like to use additional tags in the review, select **Show the following additional tags**. Then select the additional tags you want in the box that displays.
12. Click **CONTINUE**. The **REVIEWERS** page displays.
13. Select reviewers to assign to the review. Click **CREATE**. The statistical review is created. The assigned reviewers will see a review card for this new review when they open the case in CloudNine™ Explore Web.

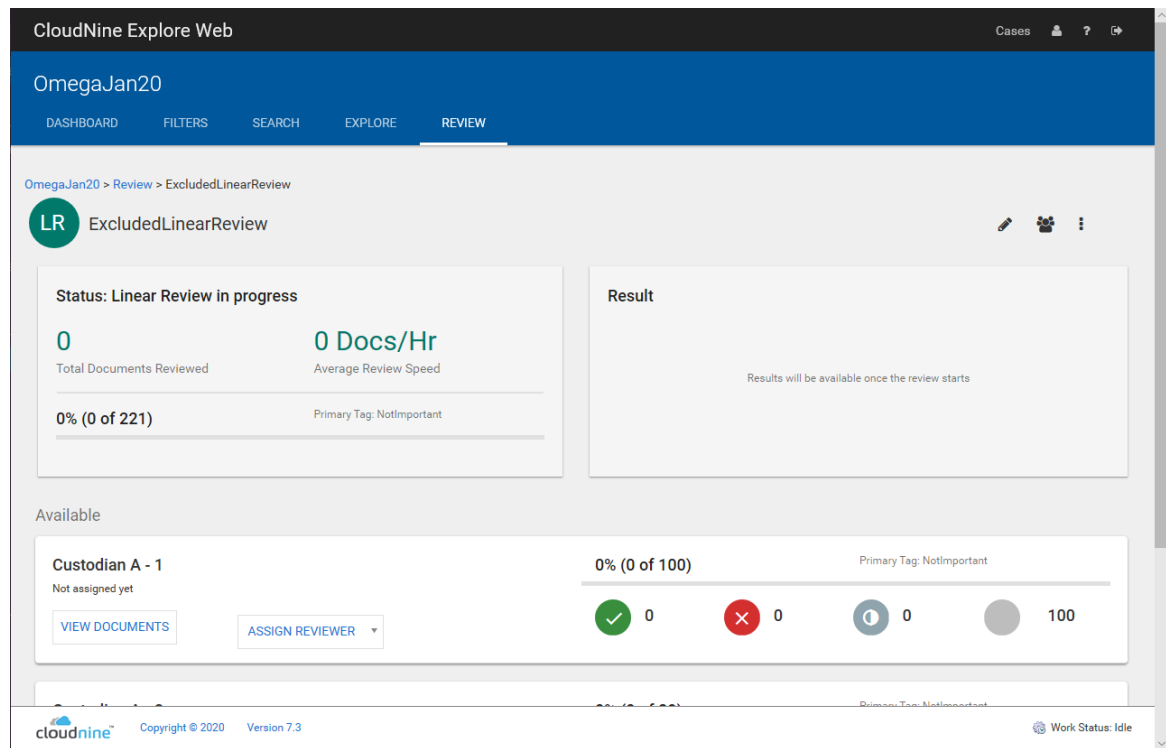
### Running Linear Reviews

The screenshot shows a card for a Linear Review. At the top left is a green circle with the letters 'LR' in white. To its right is the title 'ExcludedLinearReview'. Below the title are three rows of text: 'Create 1/24/2020', 'Source Excluded Documents', and 'Documents 221 in total'. In the center is a progress bar showing '0% (0 of 221)' with a thin grey bar below it. Below the progress bar is the text 'Estimated Remaining Time' followed by '00H:00M' in a larger font. At the bottom center is a blue link that says 'VIEW DETAILS'.

## Running a Linear Review

Starting from the **REVIEW** page for a case:

1. Click **VIEW DETAILS** on the review card for the linear review you want to start. Details for the linear review display.



2. If a batch of documents has not been assigned to you yet, within that batch select yourself from the **ASSIGN REVIEWER** drop-down.
3. To review documents click **VIEW DOCUMENTS** in the batch you want to review. The document viewer opens and displays the first document in the batch.
4. Review the documents as needed. You can decide whether tags should be applied in the panel on the right, or mark documents for further review. See [Using the Document Viewer](#) for more details on functionality available within the viewer.
5. To pause reviewing, click **Back** in the upper left corner. The **REVIEW** page displays again. You can return to the same review again, and you will be taken to the first non-coded document in the batch.

### Running Statistical Reviews

For a Statistical Review, CloudNine™ Explore Web draws a random sample of documents from the document set for review. Statistical sampling uses statistical

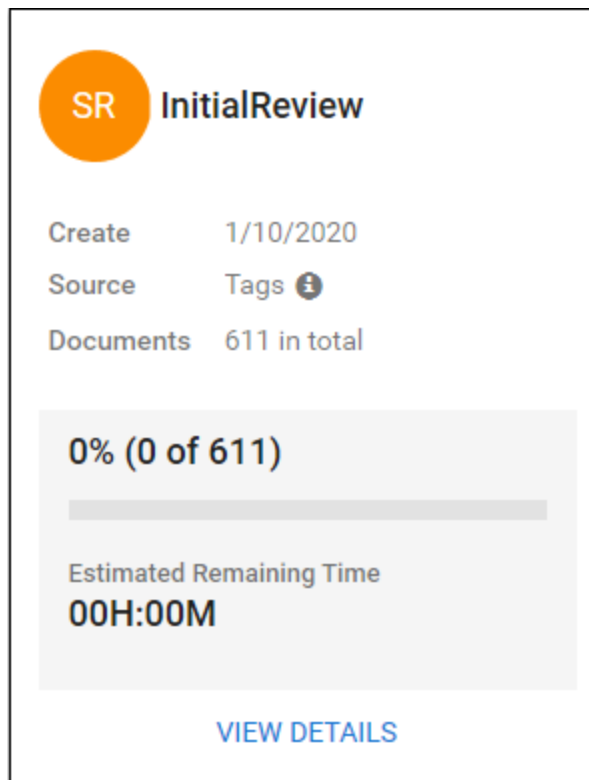
mathematical model to help infer information about an entire population based on the information provided in a subset of the population. For CloudNine™ Explore Web, statistical sampling allows you to evaluate a subset of case files to determine information about all files in a case or document set with a specific level of confidence and margin or error. Statistical sampling can also help you evaluate the effectiveness of the filters and searches applied to a case's files.

Statistical samples can be created for all case files, or limited to specific tags, excluded or included documents, or specific search queries. All documents in a statistical sample are randomly selected. Once a statistical sample is created, you can review the documents in the sample from the review view on the Statistical Review tab.



In CloudNine™ Explore Web, all users (including read-only users) can view and review statistical samples, and can apply the primary and secondary tags defined for a statistical sample to the documents in the statistical sample.



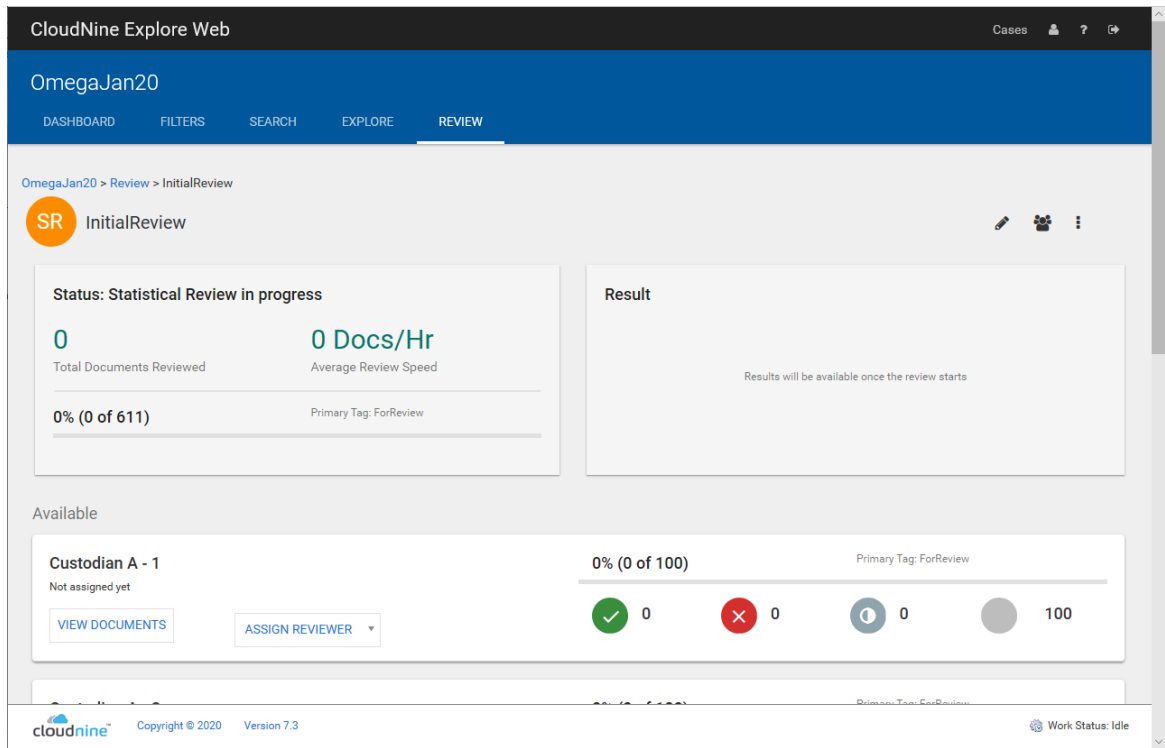


The screenshot shows a review card for 'InitialReview'. It features an orange circular icon with 'SR' inside. Below the icon, the text 'InitialReview' is displayed. The card lists the following details: 'Create' on 1/10/2020, 'Source' with a 'Tags' icon, and 'Documents' totaling 611. A progress bar indicates 0% completion (0 of 611). Below the progress bar, the 'Estimated Remaining Time' is shown as 00H:00M. At the bottom of the card, there is a blue link labeled 'VIEW DETAILS'.

## Running a Statistical Review

Starting from the **REVIEW** page for a case:

1. Click **VIEW DETAILS** on the review card for the statistical review you want to start. Details for the statistical review display.

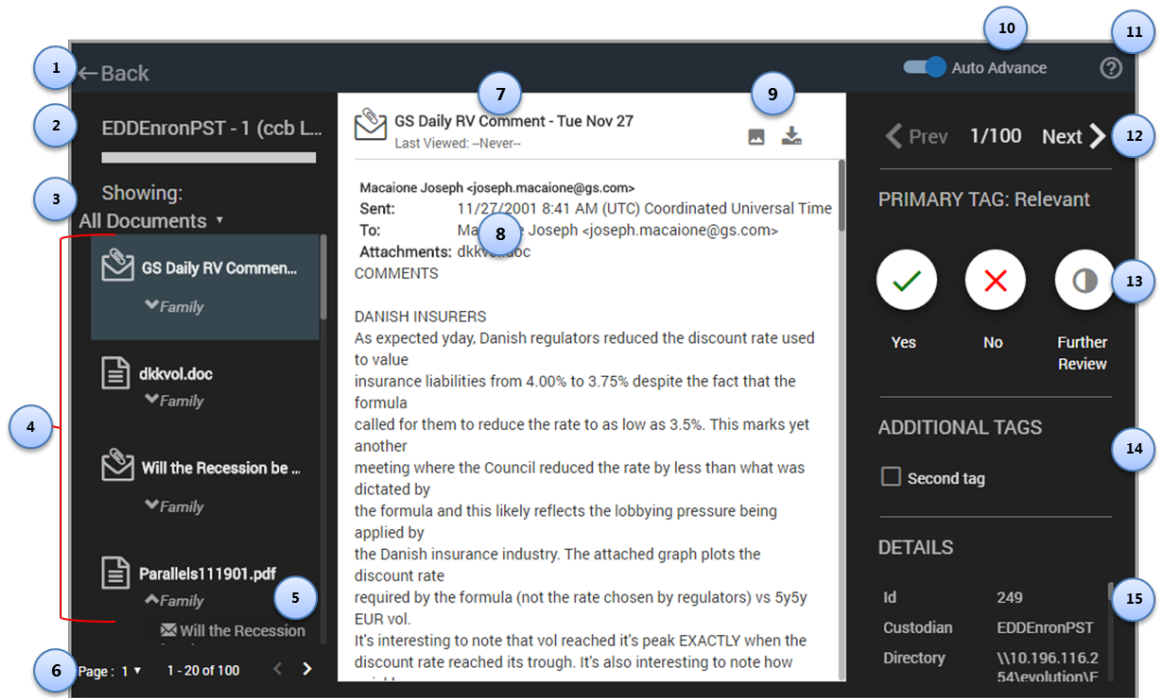


2. If a batch of documents has not been assigned to you yet, within that batch select yourself from the **ASSIGN REVIEWER** drop-down.
3. To review documents click **VIEW DOCUMENTS** in the batch you want to review. The document viewer opens and displays the first document in the batch.

4. Review the documents as needed. You can decide whether tags should be applied in the panel on the right, or mark documents for further review. See [Using the Document Viewer](#) for more details on functionality available within the viewer.
5. To pause reviewing, click **Back** in the upper left corner. The **REVIEW** page displays again. You can return to the same review again, and you will be taken to the first non-coded document in the batch.

### Using the Document Viewer

The document viewer is where you access review tools. Using the document viewer, you can filter the document list, move between documents, explore document families, access document text, apply tags, download the document, and open the document in the near native viewer.



	<b>F e a t u r e</b>	<b>Description</b>
1	<b>Back</b>	Goes back to the REVIEW page.
2	<b>Batch and Review Name</b>	Batch title followed by review name in parentheses.
3	<b>List Filter</b>	Can be set to All Documents (default), Coded Docs, Further Review, or Uncoded Docs.
4	<b>Document List</b>	File icon can be email, email with attachment, or e-document. File title and link to family documents.

### ***Managing Reviewers***

In order to add a reviewer to a review, the following conditions must be in place:

- The user's account must have Standard Access (not read-only).
- The user must be assigned to the client and to the case that will be reviewed. You can assign a user to a client and to a case as a part of creating the user, or after the user is created. See [Managing Clients](#) for more information.
- The reviewer must be assigned to review batches. This can be done after the reviewer is assigned to the review.

## **Assigning a Reviewer to a Case**

1. Sign in to CloudNine™ Explore Web using an Administrator account. The **Cases** list displays.
2. Click **Administration** in the menu bar (top right). The **Administration** page displays.
3. Click **Users** in the menu on the left. The Manage Users page displays.
4. Click the name of the user you want to add as a reviewer. The Edit user page displays on the **User Information** tab.
5. Click the **Case Assignment** tab.
6. Click **ADD/REMOVE CASES**. The **Add/Remove Cases** dialog displays.
7. Select the check box next to the client + case combination to add to this user.
8. Click **SAVE CHANGES**.

Add/Remove Cases
✕

<input type="checkbox"/>	Client	Case Name
<input checked="" type="checkbox"/>	Client X	Client X - Case 01
<input type="checkbox"/>	Client Y	Client Y - Case 01
<input type="checkbox"/>	Client Y	Client Y - Case 02

SAVE CHANGES
CLOSE

9. Select the client/case line you want to add the reviewer to. You can sort the list by client or by case name by clicking on the column header.
10. Click **Save Changes**. The user is added to the review and the **Case Assignment** tab displays with the updated list.

## Adding or Removing Reviewers from a Review

This procedure assumes that the user you want to assign to the review is already assigned to the client and to the case.

1. Sign in to CloudNine™ Explore Web as an Administrator. The **Cases** list displays.
2. Select the case you want to add or remove reviewers for. The **DASHBOARD** page displays.
3. Click **REVIEW**. The **REVIEW** page displays.
4. Click **VIEW DETAILS** on the review you are interested in. Details for the review display.
5. Click the Edit Reviewer (people) icon in the upper right. Depending on the review type, you will see the Edit review dialog on the **REVIEWERS** page.

6. Select or clear the check box to add or remove the specific reviewer for this review.
7. Click **SAVE**. The review is updated based on your selections.

## **Assigning Reviewers to a Batch**

1. Sign in to CloudNine™ Explore Web as an Administrator. The **Cases** list displays.
2. Select the case you want to assign reviewers to. The **DASHBOARD** page displays.
3. Click **REVIEW**. The **REVIEW** page displays.
4. Click **VIEW DETAILS** on the review you are interested in. Details for the review display.
5. Click **ASSIGN REVIEWER** in the appropriate batch. A box displays with available reviewers.
6. Select a reviewer from the list.
7. Click **CONFIRM**. The batch is updated with the selected reviewer.

## **Unassigning Reviewers From a Batch**

1. Sign in to CloudNine™ Explore Web as an Administrator. The **Cases** list displays.
2. Select the case you want to add or remove reviewers for. The **DASHBOARD** page displays.
3. Click **REVIEW**. The **REVIEW** page displays.



4. Click **VIEW DETAILS** on the review you are interested in. Details for the review display.
5. Click **UNASSIGN REVIEWER** in the appropriate batch.
6. Click **YES** to confirm removing the user from this batch. The display updates and the batch shows the new list of assigned reviewers.



To remove the reviewer from all batches you can either select each batch individually and remove the user, or you can remove the reviewer from the case.

### *Administering Reviews*

## Managing Review Tags

Primary tags are locked when the review is created, but you can add, edit, and remove additional tags even after the review has been started.

Starting from the **REVIEW** page for a case:

1. Click **VIEW DETAILS** on the review you are interested in. Details for the review display.
2. Click the **Edit Review** (pencil) icon in the upper right corner. The Edit review dialog displays.
3. Click **TAGS**. The **TAGS** page displays.
4. Select Show the following additional tags.
  - a. To add an additional tag, click in the **Add tag or select tags below** box. Select the check box for the tag you want to add. The tag is added to the **Selected tags list** on the right.
  - b. To remove an additional tag, click the x next to the tag in the **Selected tags list** on the right.

- c. To add a new tag, type the new tag name in the **Add tag or select tags below** box. Click **ADD** to save. The tag is added to the **Selected tags list** on the right.
5. Click **SAVE**. The review is updated with the tag changes. If someone is viewing documents in the review when you click **SAVE**, the edited tags will display when they load the next document.

## **Monitoring Review Status**

1. Sign in to CloudNine™ Explore Web as an Administrator. The **Cases** list displays.
2. Select the case you are interested in. The **DASHBOARD** page displays.
3. Click **REVIEW**. The **REVIEW** page displays.
4. Find the review you want to monitor. The **REVIEW** page displays a snapshot of the status of that review. When the review is in progress, you will see a percentage of documents that have been reviewed and estimated time remaining to complete the review.
5. Click **VIEW DETAILS** to see additional information for the review, including information for each individual batch in the review.

## **Deleting a Review**

1. Sign in to CloudNine™ Explore Web as an Administrator. The **Cases** list displays.
2. Select the case you are interested in. The **DASHBOARD** page displays.
3. Click **REVIEW**. The **REVIEW** page displays.
4. Click **VIEW DETAILS** for the review you want to delete.

5. Click more (three dots) in the upper right corner.
6. Click Delete Review. A confirmation dialog displays.
7. Click **YES, DELETE** to confirm deletion of the review. The review is deleted.



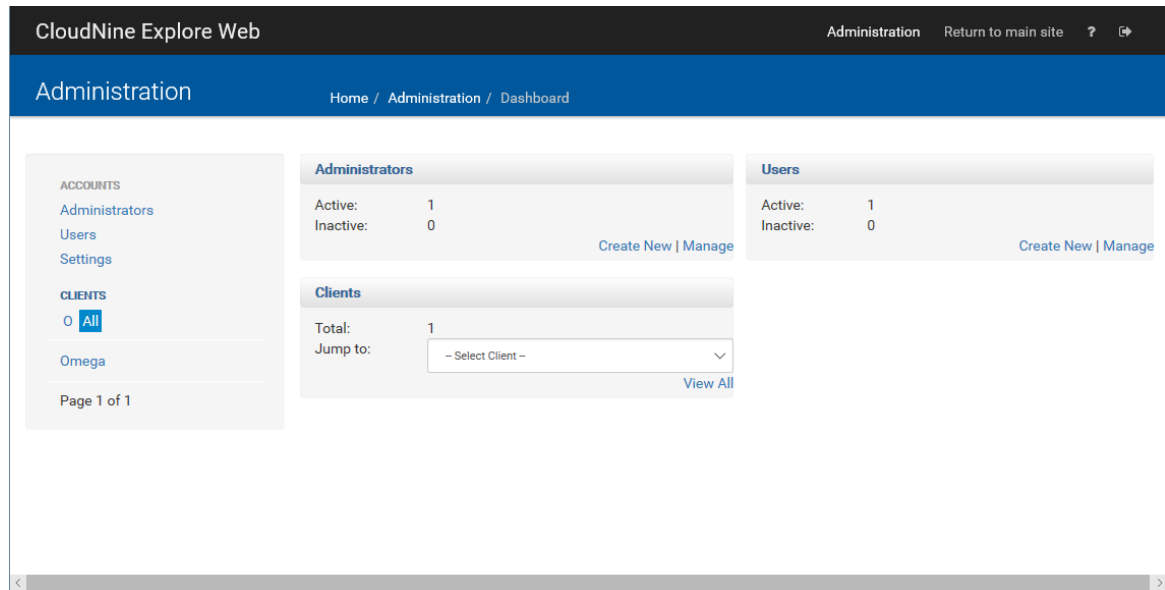
Before deleting a review, we recommend removing all reviewers assigned to the review first.

## ***Administering CloudNine Explore Web***

Administration features for CloudNine™ Explore Web® are available on the **Administration** page.

### **Opening the Administration Page**

1. Sign in to CloudNine™ Explore Web using an Administrator account. The **Cases** list displays.
2. Click **Administration** in the menu bar (top right). The **Administration** page displays.



## Managing Accounts

When you create a new account, you assign the user a role. The role determines the kind of activities the user can engage in.

You also assign an authentication method to the user. Authentication can be set up to use Microsoft Active Directory or CloudNine™ Explore Web. For more information, see [Authentication Methods](#). No matter what the authentication method used, user actions in CloudNine™ Explore Web are logged in the EDAUserAudits table in the EDA\_Management SQL Server database.

If you are signed in as an administrator, you can delete any account except for the one you are currently using.

## Adding an Administrator Account

Starting from the **Administration** page:

1. In the **Administrators** section, click **Create New**. The **Create Administrator** page displays.
2. Fill in the form:

Field	Description
<b>Account Type</b>	<ul style="list-style-type: none"> <li>• <b>CloudNine™ Explore Web Account</b> - using this option, the new administrator or any other CloudNine™ Explore Web administrator can change or reset the password.</li> <li>• <b>Active Directory Domain Account</b> - using this option, the new administrator will use their existing domain account user name and password. This option is only accessible if Active Directory login is enabled in CloudNine™ Explore Web. For more information see <a href="#">Authentication Methods</a>.</li> </ul>
<b>Username</b>	Enter the <b>Username</b> for the new administrator account. The <b>Username</b> is not editable after the account is created. If <b>Account Type</b> is <b>Active Directory Domain Account</b> , the <b>Username</b> is not editable within Explore Web.
<b>First name</b>	Enter the <b>First name</b> for the new administrator account. This can be edited later. If <b>Account Type</b> is <b>Active Directory Domain Account</b> , the <b>Username</b> is not editable within Explore Web.
<b>Last name</b>	Enter the <b>Last name</b> for the new administrator account. This can be edited later. If <b>Account Type</b> is <b>Active Directory Domain Account</b> , the <b>Username</b> is not editable within Explore Web.
<b>Email</b>	Enter an <b>Email address</b> associated with the

3. Click **CREATE ADMINISTRATOR**. The account is created.

## **Adding User Accounts**

Starting from the **Administration** page:

1. In the **Users** section, click **Create New**. The **Create User** page displays.
2. Fill in the form:

Field	Description
<b>Account Type</b>	<ul style="list-style-type: none"> <li>• <b>CloudNine™ Explore Web Account</b> - using this option, the new administrator or any other CloudNine™ Explore Web administrator can change or reset the password.</li> <li>• <b>Active Directory Domain Account</b> - using this option, the new administrator will use their existing domain account user name and password. This option is only accessible if Active Directory login is enabled in CloudNine™ Explore Web. For more information see <a href="#">Authentication Methods</a>.</li> </ul>
<b>Username</b>	Enter the <b>Username</b> for the new account. The <b>Username</b> is not editable after the account is created. If <b>Account Type</b> is <b>Active Directory Domain Account</b> , the <b>Username</b> is not editable within Explore Web.
<b>First name</b>	Enter the <b>First name</b> for the new account. This can be edited later. If <b>Account Type</b> is <b>Active Directory Domain Account</b> , the Username is not editable within Explore Web.
<b>Last name</b>	Enter the <b>Last name</b> for the new account. This can be edited later. If Account Type is Active Directory Domain Account, the Username is not editable within Explore Web.
<b>Email address</b>	Enter an <b>Email address</b> associated with the new account. If <b>Account Type</b> is <b>Active Directory Domain Account</b> , the Username



3. Click **CREATE USER**. The account is created.

## Deleting an Account

Starting from the **Administration** page:

1. Click **Manage** in either the **Administrators** or **Users** section, depending on the user you want to delete.
2. Select the specific user you want to delete from the user list displayed.
3. At the bottom of the **User Information** page, click **DELETE USER** or **DELETE ADMINISTRATOR**. A confirmation dialog displays.
4. Click **DELETE USER** or **DELETE ADMINISTRATOR**. The administrator/user is deleted.

## Managing Clients

Starting from the **Administration** page:

1. In the **Clients** section click **View All**. The **Clients** page displays.
2. From this list you can see the number of **Cases** and number of **Users** associated with each client. Click on a client's **Cases** or **Users** links to see the full list of each.
3. From the **Cases** or **Users** list you can manage cases and/or users associated with the client.



Alternatively you can see the **Cases** and **Users** associated with a specific client by selecting the client from the list presented in the menu on the left of the **Administration** page.

## Authentication Methods

When you create a user account, you specify an authentication method that the user will use to sign in to CloudNine™ Explore Web. The user can use a CloudNine™ Explore Web sign in name and password that you create, or they can use their existing Microsoft® Active Directory® user name and password. You do not have to use the same kind of authentication for all users. Some users can be setup using CloudNine™ Explore Web authentication while others can use Active Directory.

In order to use Active Directory authentication, it must be enabled in CloudNine™ Explore Web. Then, when you create new users, you can specify their account type as Active Directory or CloudNine™ Explore Web. After you create an account, the authentication method cannot be changed for that account. For more information on creating accounts, see [Managing Accounts](#).

When Active Directory authentication is used to set up a user or administrator, their user name, password, first/last name, and e-mail address are managed through the domain server.

CloudNine™ Explore Web does not manage unlocking or password expiration for administrator or user accounts that use Active Directory. If an administrator or user account uses Active Directory log on, account locking and password expiration is managed by Active Directory's policy. For account locking, the account needs to be unlocked in Active Directory.



For expired passwords, the password must be changed in Microsoft® Windows before it will be accepted in CloudNine™ Explore Web. Once a password is changed in this way, it may take up to 15 minutes for the new password to propagate across Active Directory, so there may be a waiting period before the administrator can sign in to CloudNine™ Explore Web with the new password.

## Enabling Active Directory Authentication

Starting from the **Administration** page:

1. Select **Settings** from the menu on the left.
2. Select **Active Directory logins enabled**.
3. Type the active directory **Domain**.
4. Click **TEST CONNECTION** to verify Explore Web can connect to the active directory domain.
5. Click **SAVE SETTINGS** to update your **Active Directory Settings**.



# CloudNine™ Explore Web

User Guide

## Reference Information

Chapter

3

## Reference Information

### ***Contacting CloudNine and Training Videos***

CloudNine™ offers the broadest choice of discovery solutions, giving law firms, corporations and government agencies the efficiency, control, and confidence they need to litigate successfully in the face of overwhelming data volumes and rapidly changing technology.

### **Technical Support**

Our number one priority is our clients. Our representatives pride themselves on resolving client issues quickly and effectively. To receive technical assistance, or to provide feedback or suggestions, please e-mail or call us. The Technical Support team is available from 9:00 am to 7:00 pm Eastern Time, Monday through Friday.

E-mail: [lawsupport@cloudnine.com](mailto:lawsupport@cloudnine.com)

Phone: 713-462-6464 ext. 13 for CloudNine™ Explore

### **Websites**

CloudNine™ Solutions:

[CloudNine](#)

CloudNine™ Answer Center:

[CloudNine™ Answer Center](#)

### **Sales**

Our sales team is committed to helping you to find the right products to suit your requirements. Contact us to learn more about the many flexible licensing options for CloudNine™ Explore, and to see how our related software and service offerings for litigation support — such as CloudNine™ LAW, Concordance® and Concordance Desktop®

E-mail: [CloudNine Ediscovery Sales Team](#)

## Client Training Program

To help you meet the increasing complexity of electronic discovery, our Client Training Program offers classroom experiences that focus on applying the powerful features of LAW to solve real-world problems. To learn more about our training offerings, please e-mail our training team.

E-mail: [training@cloudnine.com](mailto:training@cloudnine.com)



[CloudNine LAW Video Library](#)

Subjects that are covered are below. If you find that you would like a video that currently isn't covered, please let us know.

Workflow Overview From Case Creation to Export

Creating a New Case

Dashboard Overview

Tagging Overview

Reports Overview

OCR Overview

Configuring Case List & File Type Mangement

## ***Languages***

CloudNine™ Explore can recognize the languages that exist in imported documents. The languages recognized are listed in the following table:



Supported Languages			
LAN G_AF RIKA ANS	LAN G_FR ENC H	LAN G_L UXE MBO URGI SH	LAN G_S OMA LI
LAN G_AL BANI AN	LAN G_FR ISIA N	LAN G_M ACE DON IAN	LAN G_S ORBI AN
LAN G_AL SATI AN	LAN G_F ULF ULD E	LAN G_M ALA Y	LAN G_S OTH O
LAN G_A MHA RIC	LAN G_G ALICI AN	LAN G_M ALA YAL AM	LAN G_SP ANIS H
LAN G_A RABI C	LAN G_G EOR GIA N	LAN G_M ALTE SE	LAN G_S WAH ILI
LAN G_A RME NIA	LAN G_G ERM	LAN G_M ANIP	LAN G_S WED

\*Due to a change in ABBYY licenses, only the languages show above are supported

## ***Abby OCR Languages***

Below is the list of languages that can the ABBYY engine can perform OCR on, inside of Explore.

Chinese (PRC)	English	Hungarian	Latin	Romanian
Chinese (Taiwan)	Finnish	Italian	Norwegian (Bokmal)	Romanian (Moldavia)
Czech	French	Japanese	Polish	Russian
Danish	German	Korean	Portuguese (Brazil)	Spanish
Dutch (Netherlands)	Greek	Korean (Hangul)	Portuguese (Standard)	Swedish

## ***Explore Field Descriptions***

The following table provides reference information for all Explore fields. For a download-able copy of field descriptions please see the **PDF Guides**.

In the Explore Field Descriptions table, the DAT File Field Name column is blank if the field name used in a DAT file is the same as the original Explore field name. If Explore needs to change the field name for a DAT file, the corresponding field name is displayed in the DAT File Field Name column. The EDRM File Field Name column is blank if the field name used in an EDRM file is the same as the original Explore field name. If Explore needs to change the field name for an EDRM file, the corresponding field name is displayed in the EDRM File Field Name column.

Field Name	Field Description	Examples	D A T F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
<Tag Name>	Each tag created in CloudNine™ Explore and CloudNine™ Explore Web is included in the .General\Tags category.	ex: Confidential  ex: Relevant			
Applicat	Application used to create the document.	ex: Microsoft			EDocuments.D

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ion		Office Power Point			ocApplication Name
Appointment	Appointment end date and time for calendar/appointment items. In version 1.6 or later, the time	ex (ApptEnd):	ApptE		Emails.Appointment End

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
tEnd	zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).	20140313  ex (TmApptEnd):  22:15:00	nd  TmApptEnd		

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		ex (EDRM):  2014-03-13T22:15:00			
Appto	Appointment start date and time for	ex (ApptS	Ap		Emails.Ap

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
intmentStart	calendar/appointment items. In version 1.6 or later, the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).	tart): 20140313 ex (TmAppointmentStart): 23:00:00	p t S t a r t  T m A p		pointmentStart

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		ex (EDRM):  2014-03-13T23:00:00	ptStart		
Appo	Appointment type	Meeting	Ap		EmailApp



Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
AppointmentType		Appointment	ptType		appointments table
Attach	Semi-colon-delimited list of filenames of the	ex: UserGuide.pdf;Hel		#Attachment	Emails.Attach

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	(top-level) attached files.	pFile.c hm		entN ames	
Attac hL ist	Populated for parent records only, this field contains a semi-colon-delimited list of	ex: A0001 ;A000 2;A00 03			Gene rated at time of

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	export numbers for the parent and each attachment record. In the example, A0001 is the parent and A0002 and A0003 are attached to A0001.				export
Attac	Semi-colon-delimited list of	ex: UserG		#Atta	Emails.Att

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Attachments	filenames of the (top-level) attached files.	uide.pdf;HelpFile.c hm		chmentN ames	ach
AttachP	Export number of the (top-level) parent document.	ex: A0001			Generated at

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Parent	Applied to all members of the family.				time of export
Attachment	Export numbers of the parent document and the last attachment in the family, separated by a hyphen. Field is	ex: A0001 - A0003			Generated at time of

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	empty for records that are not part of a parent/attachment relationship.				export
Author	Author field value extracted from the metadata of the native file during analysis.	ex: John Smith		#Author	EDocuments.DocAuthor

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
BCC	Recipient(s) of "Blind Carbon Copies" of the email message.	ex: Smith, Jane (LNG-HBE) <jane.smith@cloudnine.com>		#BCC	Emails.Bcc

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Business Address	Business address for contact		Business Address		EmailContacts. Business Address



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Business Phone	Business phone number for contact		BusPPhone		EmailContacts. Business Phone
Business	Secondary business phone number for		Bu		EmailCon

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
esP hone 2	contact		s P h o n e 2		tacts. Busi ness Phon e2
Ca se	Name of the CloudNine™ Explore	ex: MyEda			Case Prop ertie

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	case from which the files were exported.	CaseName			s.Name
Categories	Category field value extracted from metadata of the native file.	ex: Software		#Categories	EDocuments.DocCategory

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
CC	Recipient(s) of "Carbon Copies" of the email message.	ex: Smith, Jane (LNG-HBE) <jane.smith@CloudNine.com>		#CC	Emails.Cc

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Cellular Phone	Cellular phone number for contact		CellPhone		EmailContacts. CellularPhone
Client	Client name specified on the	ex: Client			EDA_Man

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
t	General tab in the New or Edit Case Settings dialog box.	Matter _01			agement :  EdaCaseListings.Client  EdaCaseLi

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
					s.Name
Code Page	Numeric value that specifies the character set used in the file.	ex: 1252			Emails.CodePage

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Comments	Comments field value extracted from the metadata of the native file.	ex: Paragraph needs updated info.		#Comments	EDocuments.DocComments
Com	Company name for contact				EmailContacts.



Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
pany					Company
CompressedSize	Populated for items that were contained within certain archive types (e.g. not populated for 7zip items), this field contains the	ex: 29777 92	Compressize		InventoryItems.CompressedSize

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	compressed size of the file in bytes.				
Contact Email	Email address for contact		CONTACTE		EmailContacts. ContactEmail

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
			ml		
Contact Email 2	Secondary email address for contact		CONTACTE		EmailContacts. ContactEmail 2

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
			ml2		
ContainerPath	For documents extracted from a Microsoft Outlook or Lotus Notes mail store, archive, or forensic image container file, the	ex: Inbox\ Follow Up	Contain	ContainerPath	InventoryItem.msComposite

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	R e l a t e d D a t a b a s e F i e l d N a m e (s)
	<p>path of the document as it exists in its immediate parent container file.</p> <p>For example, if there is a .pst file containing the folder structure Inbox\ProjectA\email.msg, the ContainerPath value</p>		P a t h		Name

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	for the email.msg file would be:  Inbox\ProjectA				
Conversation	Microsoft-specific value used to identify an e-mail conversation.	ex: 01CF5 D946F 4EFD6 56072 02	ConvId		Emails.ConversationID

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
nlnd					
Conversation Index	Microsoft-specific value used for tracking position of an email within a conversation. This value is used during the process of email threading.	ex: 0101C F602E 916BD DE035 F5FB3 D47A 8D8D 2	Conversation		Emails.ConversationIndex

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		D6F92 CC769	ex		
ConversationTopic	Normalized subject of emails.	ex: Priorities for 2013	ConvTop		Emails.ConversationTopic



Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
			i c		
Created	File creation date and time extracted from the metadata of the native file during analysis. In version 1.6 or later, the time zone of the exported date will	ex (Created):  20140 225	C r e a t e d	# D a t e C r e a t e d	EDoc ume nts.D ocCr eate d

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>match the "Case Time Zone" set prior to analysis (Case Settings &gt; General tab).</p> <p>If the Created date metadata is not available, this field will be populated with date information from</p>	<p>ex (TmCreated):</p> <p>15:48:53</p> <p>ex (EDRM):</p>	TmCreated		

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	R e l a t e d D a t a b a s e F i e l d N a m e (s)
	the parent hierarchy or the file system if no parent exists.	2014-02-25T15:48:53			
Custodian	Textual custodian value assigned by the user on the Import tab.	ex: Smith, John			Custodians.Name

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Date Filter LowerBound	For emails, this field contains the sent date of the message, split into two fields in the load file: DF_LBound (date in YYYY/MM/DD format) and TmDF_LBound (time in HH:MM:SS 24-hour time format, GMT). For calendar /	ex (DAT) (DF_LBound):  20061225  ex (DAT) (TmDF	DF_LBound          Tm		Date Filter LowerBound

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>appointment items, these fields hold the appointment start date and time. For e-documents, the earlier of the two dates found in the creation and last modified fields (within the internal document metadata (if available)) is used.</p>	<p>_LBound): 21:55:00 ex (EDRM): 2006-12-</p>	<p>D F - L B o u n d</p>		

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	In version 1.6 or later, the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).	25T21:55:00			
Date	For emails, this field holds the sent date	ex (DAT)	DF		Date Filter

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Filter Upper Bound	of the message, split into two fields in the load file: DF_UBound (date in YYYY/MM/DD format) and TmDF_UBound (time in HH:MM:SS 24-hour time format, GMT). For calendar / appointment items, these fields hold the	(DF_UBound): 20081225  ex (DAT) (TmDF_UBound):	_UBound  TmDF		UpperBound

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>appointment end date and time. For e-documents, the more recent of the two dates found in the creation and last modified fields (within the internal document metadata (if available)) is used. In version 1.6 or later, the time zone</p>	<p>22:05:00                      ex (EDRM):                      2008-12-25T22:05:00</p>	<p>- Unbound</p>		



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).				
Date So	Indicates where the document created and modified dates were obtained.	Possible values:			EDocuments.Dates

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Source		1=File System 2=Parent 3=Mapi Properties			Source

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		4=Archive Entry  5=Metadata			
Decryp	Indicates whether a file was decrypted during import.	Possible values (DAT):			Inventory Items.D

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ted		0 or No=File was never encrypted OR file was encrypted and could			ecrypted

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		not be decrypted  1 or Yes=File was successfully decrypted			

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
Delegator	Person who assigned the task				EmailTasks.Delegator
Delivery Receipt	Indicates whether the option to request a delivery receipt was enabled	Possible values:			Emails.DeliveryReceipt

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	in the email message.	0=No receipt requested or non-mail item  1=Delivery receipt			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		requested			
DepartmentName	Department name for contact		DeptName		EmailContacts. DepartmentName



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
me					
Directory	Path to the original folder/location of the source file. For each item that originated in a mail store, the Directory will list the path to the mail store.	ex: C:\Data			Directories, Inventor yItems.D

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
					irectoryId
Display Name	Full name field from Outlook contact				EmailContacts.DisplayName

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
DistributionListMembers	Distribution list member names and email addresses separated by semicolons	MemberName1 <EmailAddress1>; MemberName2 <Email	DistributionMembers		DistributionListMembers.MemberName  Distribution

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		Address 2>			onListMembers.Email Address
Document	ID number associated with the native file type	ex: 2209			Inventory

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
entType	(provided by third-party file identification engine).				ms.FileType
Duplicate	Names of the custodians containing duplicate versions of the original record. Populated for parent	ex: FirstCustodianName; Second			Generated at time of

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
mes	duplicates/original records only.	dCustodian Name			export
Duplicate Paths	Source path to each duplicate version of the original record. Populated for parent/original records only.	e-doc ex:  CustName\Folder0			Generated at time of export

<b>Field Name</b>	<b>Field Description</b>	<b>Examples</b>	<b>DAT File Field Name</b>	<b>EDRM File Field Name</b>	<b>Related Database Field Name(s)</b>
		1\Folder02  email ex:  CustName\ Mail- Stores \Archi			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		ve.pst\ Inbox			
Duplicated	Contains the Edald value of the original record in a duplicate relationship (the original and all associated duplicates are	ex: 42			Generated at time of export



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	assigned the same value).				
DupParentName	Custodian name of the original record. Populated for duplicate records only.	ex: ParentCustodianName	DupParentN		Generated at time of export

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
			a m e		
Du p p l e t h	Name of the custodian containing the original record. Populated for duplicate records only.	e-doc ex:  CustName\Folder0	D u p p l e t		Gene rated at time of expo rt

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		1\Folder02  email ex:  CustName\ Mail- Stores \Archi	P a t h		

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		ve.pst\ Inbox			
Edal d	Unique value for each record in a CloudNine™ Explore case - assigned by CloudNine™ Explore during analysis.	ex: 1			Inventory Items.I D

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ED Folder Path	Relative path to source files (if e-docs or loose e-mail) or relative path and folder path contained within a mail store (if NSF or PST).	edocs = folder\ folder\ folder  emails = folder\ mailstore\ fol	ED Folder Path		Generated at time of export

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		der\folder			
Email Client	Email client used to send the email message (information not always available).	ex: outlook			Emails.EmailClient

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Email Subject	Subject line from the email message.	ex: FW: Priorities for 2013		#Subject	Emails.Subject
Encrypt	Indicates whether a file is encrypted.	Possible values:			InventoryItems.E

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ted		0 or No=File was never encrypted OR file was encrypted and could			ncrypted



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		not be decrypted  1 or Yes=File is encrypted			

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
Entry Id	Unique identifier of emails in mail stores.	ex: 00000 0003D E46CC 0FC76 C0418 7C0BB 41FBE BB063 E4002 000			Emails.EntryId

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
ET_Inclusive	Flags a minimal set of emails which can be viewed in order to read the email message thread's entire conversation. In the simplest case this will simply be the last message in the thread, since it will quote all the previous messages.	Possible values (DAT):  0=Not inclusive  1=Inclusive			Threading.ThreadIndex.Inclusive Message  Threading

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		Possible values (EDRM):  Not inclusive			e.g. Thread Index, Inclusive Attachment  Threading.Me

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		Yes=Inclusive			Messages.GroupID
ET_InclusiveReason	If ET_Inclusive field is set to Yes or 1, ET_InclusiveReason field indicates why the email is inclusive. If the email	Possible values: Message	ET_Incl		Threading.ThreadIndex.inclu

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
son	message contains message content that is not copied in any of its subsequent replies or forwards, Message is displayed. If the email message has attachments that are not included in any of its subsequent	Attachment  Message, Attachment	Reason		sive Message  Threading.Thread Index. inclusive Attac

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>replies or forwards, Attachment is displayed. If the email message has both new message content and new attachments not included in any of its subsequent replies or forwards, Message, Attachment is</p>				<p>hment</p>

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	displayed. If ET_Inclusive field is set to N, ET_InclusiveReason field is blank.				
ET_Indent	Indicates the indent level of the email message in relation to the first email in the email thread	Possible values:	ET_Indent	ET_Indent	Calculated by counting



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	associated with the email message.	0=First email in the email thread 1=Replies to first email	dent		the number of periods in the ET_ThreadIndex field

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		2=Replies to replies to first email  3=Replies to replies to replies to first			value.

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		email... and so on.			
ET_Is Mes	Indicates whether the document was recognized as an email message.	Possible values (DAT):			Generated at time of

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
sa ge		0=Not an email  1=Identified as an email  Possible values			export (multiple conditions apply)

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		(EDRM):  No=Not an email  Yes=Identified as an email			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ET - Message Id	Unique ID that is assigned to each message. If several documents have the same Message ID, it is because they were recognized as separate copies of the same email message.	ex: 00000 001			Threading.Messages.GroupID

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ET_ParentId	The immediate parent of the current email in the thread. For the first message, this will be blank. For each subsequent one, it will be the Edald / InventoryItems.ID (padded with zeroes to make eight characters) of the	ex: 00000 013			Threading.ThreadIndex

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>email which it replies to or is a forward of. For attachments, ET_ParentID indicates the email to which it is attached.</p>				
ET_T	A unique ID assigned to each	ex: 00000			Thre adin



Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
hreadl d	message thread.	004			g.Threadlndex.Thread
ET_Thr eadl	Composed of a base ID, plus a unique number for each message within the thread, and if there	ex: 4.1.2.3 .4.5.6. 7	E T - T h		Threading.Threadlndex.

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
index	<p>are attachments, the letter A plus the unique number for the attachment within the thread. For example, A1, A2, A3. Uses the format: [base ID].[unique number for message].A[unique attachment number]. The base</p>		index		index

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	ID is the same as the thread ID without the leading zeros. The thread index for the root message of the thread will just be this.				
ET_Thr	The total number of unique messages in the thread.	ex: 7	ET_	-	Threading.Thr

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
eadSize			ThrdSize		eadlndex.threadSize
ET_T	A sort order which follows the chain of	ex: 1	ET		Threadin

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ThreadSort	conversation, from first message to most recent. If a conversation splits into multiple branches, ET_ThreadSort will keep each of the branches together.		- ThreadSort		g.Threads.Sort

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Export Native File Title	The name of the native file that was exported. If the user selects to copy native files to the export directory in Export Configuration.	ex:00000010.ntv.pdf	Native File	<FileType="Native">	Exports.ExportNativeTitle

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Export Number	Based on the user-defined starting number specified in the Export # field on the Export tab, this value increments by one for each record in the load file.	ex: ABC00001			Expo rtl te ms. E x p o r t N u m b e r
Expo	The sub-directory below the	ex: 001	l n	In cl	Expo rtl te

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
rtPath	ExportDirectory (specified in Export Configuration) where the native file or text file was placed.		cluded in Native	and Text Exporter	ms.Export Path



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
			e File and Text P	na lFile path	

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
			ath		
ExportTextFileTitle	The name of the text file that was exported. If the user selects to copy native files to the export directory in	ex:00008393.txt	TextPath	<FileType="T	ExportTextFileTitle

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	Export Configuration.		th	ext">	
Family Parent Do	The unique identifier of the family parent of this document.	ex: 3CA85 9A0- 2786- 4A93- A6C3- DC8C	Family Parent	Family Parent D	Inventory Items.FamilyPid

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
documentGuid		9C24E BB8	rent	documentGuid	
FileDes	Text file type description of native file (provided by	ex: MS Excel 2007-	File		Inventory

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
cription	third-party file identification engine).	2010 Spreadsheet (Open XML)	Description		ms.FileTypeDesc
FileE	File extension of the native file. The value	e-doc ex:	File	#File	Inventor

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Extension	will be "Ind" for Lotus Notes documents (e.g. emails in an NSF).	docx email ex: msg	e E x t	Ex t e n s i o n	ylte ms.Fi lena me
Filename	Filename of the native file.	e-doc ex:		#F ile N a	Inve ntor ylte ms.Fi

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
me		TrainingManual.docx  email ex:  Training Oppor		me	lename

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		tunities.msg			
File Type	ID number associated with the native file type (provided by third-party file identification engine).	ex: 2209			InventoryItems.FileType



Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
FileURI	Used internally by the system to retrieve mail store items for exporting and viewing native files.	ex (Lotus Notes email): note-id://D 2D099 67C76 79B3E 86257 11400			InventoryItemCompositeURI

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
		748A11			
FlagDueBy	Date/time when action/follow-up is required for message				Emails.FlagDueBy
Flaglc	Indicates if a flag icon (follow-up flag)	6			Emails.Fla

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
on	was set for a message, and if so, what color				glcon
FlagStatus	Follow-up flag value for message	Marked			Emails.FlagStatus

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
From	Sender of the email message.	ex: Smith, Jane (LNG-HBE) <jane.smith@CloudNine.com>		#From	Emails.From

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
From Domain	Domain portion (only) of the sender's email address.	ex: Cloud Nine.com			Emails.Domain
Govern	Government ID number for contact				EmailContacts.

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
mentld					Governmentld
GUID	Global unique identifier for a document.				InventoryItem.msGUID

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
HasAttachments	Indicates whether a record has attachments or not.	Possible values:  0 or No=Does not have attachments	HasAttachments	#HasAttachments	InventoryItems.HasChildren

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
		1 or Yes=Does have attachments			
HasComments	Indicates whether comments exist in the Microsoft Word, Microsoft	Possible values:			EDocuments.DocHas



Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
ments	PowerPoint, or Microsoft Excel native file, or whether sticky notes exist in the Adobe Acrobat PDF native file.	0 or No=N o comments exist or setting was not enabled			sComments

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		during analysis  1 or Yes=Comments exist within the			

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
		document			
HasDuplicate	Indicates if the record is an original record and has duplicates in the case.	Possible values:  0 or No=Duplicate file			Generated at time of export

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		<p>OR file is not in a duplicate relationship</p> <p>1 or Yes=Original file -</p>			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		duplicates of this record exist in the case			
Hash	MD5 or SHA-1 hash of the email or edocument,	ex: F99E3 18148 64692			Inventory

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	depending on Deduplication Mode setting at time of import.	B6BD D6C1 0C30B 5A55E 5A FD4E8			ms.Hash
Hash Identifier	Indicates whether the native Microsoft Excel file contains hidden row(s) or column(s).	Possible values:	Hash		EDocuments.DocHash

Field Name	Field Description	Examples	D A T A B A S E F I E L D N A M E	E D R M F I L E F I E L D N A M E	R e l a t e d D a t a b a s e F i e l d N a m e (s)
Rows Cols		0 or No=Does not contain a hidden row or column or setting	d R o w C o l		denR ows Cols

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		<p>was not enabled during analysis</p> <p>1 or Yes=Contains</p>			



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		hidden row(s) and/or column(s)			
Hashidde	Indicates whether the native Microsoft Excel file contains hidden sheet(s).	Possible values:	HASH		EDocuments.DocHa

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
nSheets		0 or No=Does not contain hidden sheets or setting was	idSheets		sHiddenSheets

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		<p>not enabled during analysis</p> <p>1 or Yes=Contains hidden</p>			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		n sheet(s)			
Hashidde nSlides	Indicates whether the native Microsoft PowerPoint file contains hidden slide(s).	Possible values:  0 or No=Does	HashidS		EDocuments.DocHashid denSlides

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		not contain hidden slides or setting was not enabled	slides		

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		during analysis  1 or Yes=Contains hidden slide(s)			

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
Has Speaker Notes	Indicates whether the native Microsoft PowerPoint file contains speaker note(s).	Possible values:  0 or No=Does not contain speaker	Has Speaker Notes		EDocuments.DocHasSpeakerNotes

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		<p>notes or setting was not enabled during analysis</p>			



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		1 or Yes=Contains speaker note(s)			
HasT	Indicates whether the exported native	Possible			Inventor

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
ext	file has associated text in the export folder. If "Include text" is selected, the value will be "0" (DAT) or "No" (EDRM) for each record.	values:  0 or No=Include Text was not enabled or record does			ylte ms.C onte ntSta tus >1

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		not have text  1 or Yes=Native file has associated text			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
HasTrackedChanges	Indicates whether the Microsoft Word or Microsoft Excel file contains tracked change(s).	Possible values:  0 or No=Does not contain tracked	HasTrackedChgs		EDocuments.DocHasTrackedChanges

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		changes or setting was not enabled during analysis			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		1 or Yes=Contains tracked change(s)			
Head	Contents of the header extracted			# He	Emails.He

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ers	from the email message (not always present in email messages).			aders	aders
HomeAddress	Home address for contact				EmailContacts. HomeAddress

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
IconIndex	Used in Exchange to determine which icon to display (e.g. MailUnread).	ex: 42949 67295			Emails.IconIndex
Importance	Value of the Importance flag contained in the email message.	Low  Normal  High		#ImportanceF	Emails.Importance



Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		None  Note: The SQL database codes these values as numb		lag	

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		ers. Low is 0, Normal is 1, High is 2, and None is 3.			

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Imported	Date/time (UTC) the file was imported into the CloudNine™ Explore case, split into two fields in the load file: Imported (date the file was imported) and TmImported (time the file was imported). In version 1.6 or later,	ex (DAT) (Imported):  20140203  ex (DAT) (TmIm	Imported          TmI		InventoryItemms.Created

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings &gt; General tab).</p>	<p>ported ):  17:04: 05  ex (EDR M):  2014- 02-</p>	<p>m p o r t e d</p>		

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		03T17: 04:05			
ImportSet	Session name specified on the Import tab.	ex: Import Set 001	ex: 2013-		ImportSessions.Label  Sources.I

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
			2-13-001		ImportSessionId
In Re	IntMsgID of the e-mail replied to.	ex: <F9AC0070			Emails.In

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ReplyToId		9876F 64091 94372 6669A FC987 5 4D6C A6@r etda2 mbxp 006.le gal.reg n.net>			ReplyToId

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Int MsgID	Internet Message ID assigned to an e-mail message by the outgoing mail server.	ex: <BE8445B04466714283760D9A95ED6A731B12E707@RE TDA2 MBXP			Emails.IntMsgID



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		002.legal.reg n.net>			
Is All Day Event	Indicates whether the appointment is all-day	0 or No 1 or Yes	Is All Day Event		EmailAppointments.IsAllDayEvent

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
			v n t		
Is Archived	Indicates whether the native file was contained with an archive (e.g. 7zip) when imported into the CloudNine™ Explore case.	Possible values:  0 or No=Native	Is Archived		Inventory Items.Parent Cat, Inventory

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		file was not contained in an archive when imported	em		ntor ylte ms.L vl

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		1 or Yes=Native file was contained in an archive when			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		imported			
Is Attachment	Indicates whether a record is an attachment record or not.	Possible values:  0 or No=Is not an			InventoryItems.FamilyPid

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		attachment  1 or Yes=Is an attachment			Inventor ylte ms.L vl
Is Co	Indicates whether the native is a	Possible			Inventor

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
compound	"compound document" (contains embedded files).	values:  0 or No=Not a compound document  1 or Yes=Is			yltms.ls Compound

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		a compound document			
Is Compound	Indicates whether the native file was embedded in another file prior to import.	Possible values:	Is Compound	Is Compound	Inventor ylte ms.Is Com



Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
dChild		0 or No=W as not embedded within a document  1 or Yes=	pChild	dChild	poundChild

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
		Was embedded in a document prior to import			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Is Duplicate	Indicates if the record is a duplicate of another record in the case.	Possible values:  0 or No=Original file (duplicates of this record)			Inventories.Duplicate

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		exist in the case) OR file is not in a duplicate relationship			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		1 or Yes=Duplicate of another file in the case			
IsEm	Indicates whether the native file was	Possible			Inventor

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ail	recognized as an email message during import.	values:  0 or No=Native file was not recognized as an email			ylte ms.Parent Cat, Inventor ylte ms.Lvl

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		when imported  1 or Yes=Native file was recognized as an			

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
		email when imported			
IsEmail Attach	Indicates whether the native file was recognized as an email attachment during import.	Possible values:  0 or No=N	IsEmail		InventoryItem.ParentCat,



Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
ment		ative file was not recognized as an email attachment when	Att		InventoryItems.Lvl

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		imported  1 or Yes=Native file was recognized as an email			

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
		attachment when imported			
IsPrivate	Flag indicating if the message is marked as being private	0 or No 1 or Yes			Emails.IsPrivate

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Is Recurring	Flag indicating whether the appointment is recurring	0 or No 1 or Yes			EmailAppointments.IsRecurring
Journal	Type of journal entry (i.e. note, phone call, task, etc.)	Phone Call			EmailJournals.

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Type		Note Task Response			JournalType
JournalType	Long description of JournalType		JournalT		EmailJournals. JournalT

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Description			ype Description		ypeDescription
Keyw	Keywords extracted from the metadata of the native file.	ex: E-Discovery		#Keyw	EDocuments.D

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
ords				ords	ockKeywords
Label	The color label of the item (Outlook category)				Emails.Label
Lang	Semi-colon-delimited list of	ex: Englis			Inventor

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Languages	languages found in the native file.	h;Chinese_Simplified			yltemslanguages
Last Author	User who last saved or revised the document.	ex: John Smith			EDocuments.DocLastAuthor



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Last Mod	Last modified date and time extracted from the metadata of the native file during analysis. In version 1.6 or later, the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case	ex (LastMod): 20140312 ex (TmLastMod):	LastMod TmLa	# Date Modified	EDocuments.DocLastMod

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>Settings &gt; General tab).</p> <p>If the LastMod date metadata is not available, this field will be populated with date information from the parent hierarchy or the file system if no parent exists.</p>	<p>22:14:46</p> <p>ex (EDRM):</p> <p>2014-03-12T22:14:46</p>	<p>s t M o d</p>		

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Last Print	Date and time the document was last printed. In version 1.6 or later, the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).	ex (LastPrint):  20140312  ex (TmLastPrint):	LastPrint       Tm	#DatePrinted	EDocuments.DocLastPrint

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		22:14:46  ex (EDRM):  2014-03-12T22:14:46	Last Print		

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
Level (Document)	A numeric representation of the depth of the document within its container. For example, a PST file might be level 0, an email in the PST level 1, an attachment of an email in the PST level 2, etc.	0			[InventoryItems]. [Lvl]

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Level (Email Threading)	Indicates the indent level of the email message in relation to the first email in the email thread associated with the email message.	Possible values:  0=First email in the email thread  1=Replies to	ET - Indent	ET_Indent	Calculated by counting the number of periods in the

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		first email  2=Replies to replies to first email  3=Replies to replies			ET_T hrea dInd ex field valu e.

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
		to replies to first email... and so on.			
Location	Contents of the Location metadata field extracted during analysis.	ex: John's office			Emails.Location



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Manager Name	Manager name for contact				EmailContacts. Manager Name
Md5	MD5 hash value of the native file.	ex: C20B8 B8A3E			Inventorylte

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Hash		CF856 9B1D1 DFF93 A18D 13F			ms. Md5 Hash
MeetingS	Status of the meeting	NotDefined  Received	Meeting		EmailAppointments.Me

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
status		Update Invitation	gS t a t s		eting Status
MimeT	Information about the content of the file extracted from the header of emails	exs:			Inventor ylte ms.

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
Type	(with the exception of MS Outlook items) and e-documents. Not all e-documents contain this information.	application/pdf text/plain message/rfc822			MimeType

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
MsgClass	Indicates the item / entry type in the mail store.	ex: IPM.Note		# MessageClass	Emails.MsgClass
ND_	Indicates whether the document is the	Y=Yes	ND	ND_	Generated

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Is Master	<p>master document.</p> <p>Within a family, the master document is the one with the greatest overall similarity to all the other documents in the family. It has to be a near-duplicate of every other</p>	N=No	- Is Master	Is Master	at time of export

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>document in the family.</p> <p>Note: Documents that are not part of a near-duplicate family will also have a Y (Yes) value in the field.</p> <p>Note: If a master document in a set of</p>				

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>near-duplicate documents is deleted, all documents assigned to the near-duplicate set are released, and will be reassigned the next time the near-duplicate analysis process runs.</p>				



Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	R e l a t e d D a t a b a s e F i e l d N a m e (s)
N D_ M a s t e r	CloudNine™ Explore ID of the master of the document's near-duplicate family.	ex: 4	N D _ M a s t e r	N D_ M a s t e r	Gene rated at time of expo rt

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
ND_Score	<p>Displays the percentage of similarity between the document and its master document.</p> <p>Within a family, the master document is the one with the greatest overall similarity to all the</p>	ex: 85, 100	ND_Score	ND_Score	Generated at time of export

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
	other documents in the family. It has to be a near-duplicate of every other document in the family.				
Optional	Contents of the Optional recipient list extracted during analysis.	ex: lawsupport@Clou			Emails.Optional

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		dNine.com			
Organization	Organization or Company value retrieved from the metadata properties of the document.	ex: Cloud Nine		#Company	EDocuments.DocOrganization

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
Organizer	Contents of the Organizer metadata field extracted during analysis.	ex: Smith, John M. (LNG-RDU)			Emails.Organizer
Owner	Person who is assigned the task				EmailTask.s.Owner

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Parent Document GUID	Unique identifier for a parent document. This value is determined during an export.				

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Parent Export Number	Export number of the (top-level) parent document. Applied to all members of the family.	ex: A0001			Generated at time of export

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
ParentID	The immediate parent of the current email in the thread. For the first message, this will be blank. For each subsequent one, it will be the Edald / InventoryItems.ID (padded with zeroes to make eight characters) of the	ex: 00000 013			Threading.ThreadIndex



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	email which it replies to or is a forward of. For attachments, ET_ParentID indicates the email to which it is attached.				
Pass	Lists the password used to decrypt the	ex: TopSe			Inventor

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
word	file during the import.	cretPw d			ylte ms.P assw ord
Read Receipt	Indicates whether the option to request a delivery receipt was enabled in the email message.	Possible values (DAT):			Emails.ReadReceipt

<b>Field Name</b>	<b>Field Description</b>	<b>Examples</b>	<b>DAT File Field Name</b>	<b>EDRM File Field Name</b>	<b>Related Database Field Name(s)</b>
		0=No receipt requested or non-mail item  1=Read receipt			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		requested  Possible values (EDRM):  No=No receipt			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		requested or non-mail item  Yes=Read receipt requested			

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Received	Date and time the email message was received. In version 1.6 or later, the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).	ex (DAT) (Received): 20140122 ex (DAT) (TmRe)	Received TmR	# Date Received	Emails.Received

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		ceived ):  22:37: 35  ex (EDR M):  2014- 01-	e c c e i v e d		

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		22T22:37:35			
Recurrence Pattern	Description of the recurrence pattern for the meeting	every Monday from 11:00 AM to 11:30 AM	Recurrence Pattern		EmailAppointments.RecurrencePattern



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
			t t r n		atter n
Re cu rre nc eT	Frequency of the meeting recurrence	None  Weekl y	R e c u r r		Emai lApp oint ment s.Rec urre

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Type		Monthly	Type		IncentiveType
Required	Contents of the Required recipient list extracted during analysis.	ex: LitigationSalesGroup@ReedElse			EmailsRequired

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		vier.com			
Resources	List of resources for the appointment (i.e. conference rooms)	Conference Room 186			EmailAppointments.Resources

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Revision	Revision number of the document found in the file system properties.	ex: 2			EDocuments.DocRevision
Sensitivity	Value of the Sensitivity flag contained in the email message.	ex: Personal			Emails.Sensitivity

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Sent	Sent date and time of the email message. In version 1.6 or later, the time zone of the exported date will match the "Case Time Zone" set prior to analysis (Case Settings > General tab).	ex (DAT) (Sent):  20140122  ex (DAT) (TmSent):	Sent  TmSent	# Date Sent	Emails.Sent

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		22:37:35  ex (EDRM):  2014-01-22T22:37:35			

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Session	Session name specified on the Import tab.	ex: 2013-2-13-001			ImportSessions.Label  Sources.ImportSessionId

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
Sha1 Hash	SHA-1 hash value of the native file.	ex: 9D497 3C1BB 42BE7 22715 479A D3418 50DB9 95A5F E			Inventor ylte ms.Sha1 Hash



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Size	Size of the native file in bytes.	ex: 107194		#File Size	InventoryItems.Size
Source	Folder containing the source file. For items from a mail store, this field lists the name of the	ex: ArchiveFolder01			Sources.Name

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	folder containing the mail store file itself.				Inventory.ms.Sourceld
Source Do	The unique identifier (Id) of the top-level document in the parent-child				[Inventory.ms].

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
cumentID	relationship hierarchy, e.g. parent doc or mail store.				[InventoryPid]
Source Document	The GUID of the top-level document in the parent-child relationship hierarchy, e.g. parent doc or mail store.	6686B1C4-4CC6-47B3-9CCF-A2DA			[InventoryItems]. [GUID]

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
entGuid		B1EE432C			
Source File	Full path to the original file. If the file is in a container, the full path to the top-most container is returned.	ex: C:\Demo Set\Msg.pst			Directories, Inventory

Field Name	Field Description	Examples	D A T F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
					ms.FileName
Subject	Subject field value extracted from metadata of native file.  Note: Email messages subjects	ex: Cloud Nine™ LAW Benefits		#Subject	EDocuments.DocSubject

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	are exported to the EmailSubject field.				
Subject Prefix	Optional prefix for the message subject	FW: RE: Updated:	Subject Prefix		Emails.Subject Prefix

Field Name	Field Description	Examples	D A T A File Field Name	E D R M File Field Name	Related Database Field Name(s)
		Cancelled:	fix		
Tags	Semi-colon-delimited list of tag names associated with the document	ex: Responsive			InventoryItems.Tags

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Task Status	Status of the task	Complete InProgress NotStarted			EmailTasks.Status
Tem	Template field value extracted from the	ex: Norm			EDocument



Field Name	Field Description	Examples	D A T F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
plate	metadata of the native file during analysis.	al.dotm			nts.DocTemplate
Text	The text of the document extracted during Analysis or OCR. If the text is stored on disk (see IsTextStoredOnDisk),	Testing Text File			ContentItems.Content

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
	then this value will be null.				
Text Size	Size of the extracted or OCR text in bytes.	ex: 6128			ContentItems. ContentSize

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Text Source	Indicates the type of text, if any, associated with the record in CloudNine™ Explore (regardless of whether the text was included for export).	Possible values:  0=Extracted OR file does not have associated			Contentltems. Source

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		text content  1=OCR			
Title	Title field value extracted from the metadata of the native file.	ex: Cloud Nine™ Explorer		#Title	EDocuments.D

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		e Manual			ocTitle
To	Main recipient(s) of the email message.	ex: Smith, Jane (LNG-HBE) <jane.smith		#To	Emails.To

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		@CloudNine.com>			
Uid	Formatted ID comprised of the following: <Sessions.Id> - <Sources.Id> - <InventoryPid.Attachment	ex: 15-3-1.2			InventoryItems.Uid

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
Un Read	Indicates whether the email was marked read/unread.	Possible values (DAT):  0=Email was "Read" or non-mail item		#ReadFlag	Emails.UnRead

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
		<p>1=Email was marked as "Unread"</p> <p>Possible values (EDRM):</p>			



Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		No=Email was marked as "Unread"  Yes=Email was marke			

Field Name	Field Description	Examples	DAT File Field Name	EDRM File Field Name	Related Database Field Name(s)
		d as "Read"			
Un Sent	Indicates whether the email was sent for emails within a mail store.	Possible values (DAT):  0=Email was sent			Emails.Un Sent

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		or non-mail item  1=Email was not sent  Possible			

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
		values (EDRM):  No=Email was sent  Yes=Email was			

Field Name	Field Description	Examples	D A T A F i l e F i e l d N a m e	E D R M F i l e F i e l d N a m e	Related Database Field Name(s)
		not sent			
Virtual Path	For documents extracted from a Microsoft Outlook or Lotus Notes mail store, archive, or forensic image container file, the path of the	ex: Inbox\Follow Up	C o n t a i n P	C o n t a i n e r P a t h	InventoryItemCompositeName

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	<p>document as it exists in its immediate parent container file.</p> <p>For example, if there is a .pst file containing the folder structure Inbox\ProjectA\email.msg, the ContainerPath value</p>		ath		

Field Name	Field Description	Examples	DATA File Field Name	EDRM File Field Name	Related Database Field Name(s)
	for the email.msg file would be:  Inbox\ProjectA				

### ***Explore Indexed Field Descriptions***

The following table provides reference information for all indexed Explore fields.

Indexed Field Name	Indexed Field Description	Type	Examples
BCC	Recipient(s) of "Blind Carbon Copies" of the email message	string	
CC	Recipient(s) of "Carbon Copies" of the email message	string	
ContainerPath	Path of the document as it exists in its container file	string	Inbox\Follow Up
ContentSize	Size of the extracted or OCR text content in bytes	numeric	



Custodian	Custodian name	string	
DateLowerBound	Earliest date of the family members used for date filtering	DateTime	
DateUpperBound	Latest date of the family members used for date filtering	DateTime	
Directory	Path to the original folder/location of the source file. For Items that originated in a mail store, the Directory will list the path to the mail store	string	
DocApplicationName	The application used to created the	string	

	document metadata if available		
DocAuthor	Document author metadata if available	string	
DocCategory	Document category metadata if available	string	
DocComments	Document comments metadata if available	string	
DocCreated	Date document was created metadata if available	DateTime	
DocKeywords	Document keywords metadata if available	string	

DocLastAuth or	Last person who updated the document metadata if available	string	
DocLastMod	Date the document was last modified metadata if available	DateTime	
DocLastPrint	Date the document was last printed metadata if available	DateTime	
DocOrganiza tion	Document organization or company metadata if available	string	
DocSubject	Document subject metadata if available	string	

DocTitle	Document title metadata if available	string	
Filename	Native File name for edocs or email file name derived from email subject	string	Syllabus Design.doc   Status update.pdf   SmartPlanet Newsletter June 6, 2000.msg   Accepted Law Enforcement Day 2013 (LEO Day).Ind
FileType	File type description	string	MS Word 2007-2010 Document (Open XML)   Adobe Portable Document Format v1.6   Compressed Data (Headerless)   MS Publisher Document   MS Outlook Express Email Message

			Netscape Email Message
From	Sender email address	string	
FromDomain	Domain portion (only) of the sender's email address	string	gmail.com
FsCreated	Created file system date	DateTime	
FsLastMod	Last modified file system date	DateTime	
ImportSession	Import session name	string	2021-02-12- 001
InventoryId	Unique value for each record in a case	numeric	1

IsCompound	Indicates whether the native is a "compound document" (contains embedded docs)	numeric	1 or 0
IsCompound Child	Indicates whether the document was embedded in another document	numeric	1 or 0
Languages	Semi-colon-delimited list of languages found in the item	string	English;Latin
MessageClasses	Sender-defined message class that indicates the item/entry type	string	IPM.NOTE   IPM.STICKYNOTE   Memo   Mailrule   IPM.ACTIVITY   IPM.NOTES.MIME   Notice,Meeting   IPM.CONTACT

			<p>T    IPM.APPOINTMENT    Appointment, Reminder    IPM.TASK    IPM.DISTLIST    RichTextForm    (ReplyNotice)    Appointment, Meeting    Appointment, Appointment    Appointment, All Day Event</p>
MessageHeaders	Contents of the header extracted from the email message	string	<p>X-Sender:  sally@bar.com X-Receiver:  harry@bar.com MIME-Version: 1.0  From:  sally@bar.com To:  harry@bar.com Date: 16  Mar 2013  12:51:14 -0800  Subject: My</p>

			test message 45 Content-Type: text/plain; charset="us-ascii" Content-Transfer-Encoding: quoted-printable
Sent	Sent date and time of the email message	DateTime	
Size	Size of expanded item during analysis in bytes	numeric	
Source	Source name	string	
Subject	Subject line from the email message	string	
To	Main recipient(s)	string	



	of the email message		
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## ***Unicode Support***

The general requirements and supported functionality for Unicode are listed as follows:

- CloudNine™ LAW versions 5.2 and higher support the Unicode® Standard.
- Proper language packs must be installed for the associated Unicode characters to render correctly.
- To print Unicode text files, use either Microsoft Word or the Shell Printer as the source application. The Text/RTF Printer can print RTF with Unicode, however it cannot print Unicode text files.
- If using the Shell Printer, you must ensure that the application registered on the system for text files supports shell prints. For example, Notepad supports shell prints.
- The ExperVision and TextBridge OCR engines do not currently support Unicode.
- Supported languages for OCR can be found in the **Language** drop-down list located in the **OCR** tab in **Tools -> Options**.
- Printed and extracted text will contain Unicode data if it exists in the original file and can be displayed, provided the proper language pack(s) are installed on the system.

## **To View Unicode in a Grid**

- In a grid view, rest the mouse pointer over a cell that contains Unicode characters.
- The text appears in a pop-up text box.

## **Unicode in Names for Files, Cases, and Fields**

- Files with Unicode file names or residing in a Unicode path may be imported using the ED Loader. These Unicode paths can be retained and displayed in the main folder view and any other applicable folder view in the application. Unicode existing in the metadata will be retained and can be displayed in the Index display.
- Unicode is not supported in case names. While the rest of the case path can contain Unicode, it is recommended the case paths do not contain Unicode characters to avoid potential issues with 3rd party applications.
- Index field names cannot contain Unicode characters.

## **Exporting Unicode Data**

Unicode data can be sent to the export file when exporting field data from a grid.

- In the **Save Results As** dialog box, in the **Save as type** list, select **Unicode Text (Tab delimited)(\*.csv)**.

## **Exporting Unicode**

### **Export Formats**

Unicode data is supported in the Export Utility in the following export formats:

- **CaseLogistix** - Unicode is automatically included if present in the exported data.
- **Delimited Text** - Unicode data will be included only if the **Allow Unicode data (UCS-2 format)** option is enabled in this format's configuration settings.
- **EDRM XML 1.0** - Unicode is automatically included if present in the exported data.
- **EDRM XML 2.0** - Unicode is automatically included if present in the exported data.
- **Concordance Direct DCB** - Unicode data will be included only if CloudNine Concordance 10 or above is installed on the computer and **Create Concordance 10.0 database** (supports Unicode is enabled in the configuration settings for that format).
- **Concordance** - Unicode data will be included only if **Allow Unicode data (UCS-2 format)** is enabled in this format's configuration settings.

## Export Utility Restrictions

When using the Export Utility, if you export to a format that does not support Unicode characters:

- Do not use the **Mirror Original** folder naming scheme if Unicode folders exist in the case.
- Ensure the export path does not contain Unicode characters. Unicode paths and file names may prevent the target applications from opening associated images, text, or native files.

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