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Review of CloudNine

By Jennifer Dixon
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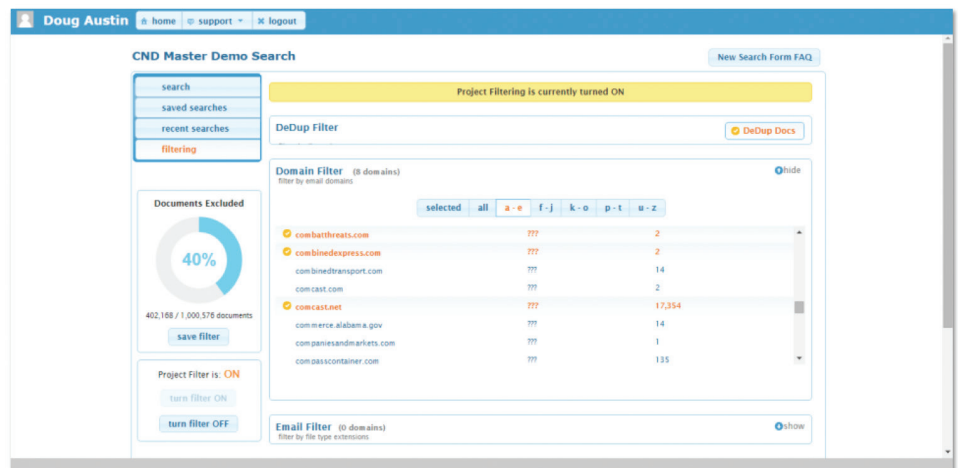**LitigationWorld® TechnoScore**   **A-**

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Every litigation team needs edis-covery software to process, re-view, and produce email and other discovery documents. In this issue of LitigationWorld, litigator Jennifer Dixon tells you whether CloudNine merits your consideration. This review explores in depth Cloud-Nine's user experience, document uploader, review tools, export op-tions, technical support, and more. Jennifer even dug up the pricing information so you won't have to.

CloudNine is web-based ediscovery software for uploading, reviewing, and producing documents, enabling litigators to handle their ediscovery projects without out-sourcing to vendors. This issue of *LitigationWorld* contains my review.

Setup
CloudNine works in any web browser without the need for plugins. I created an account using my email address and a password. CloudNine also works on a tablet. While I accessed my review project easily on an iPad, the page layout can be difficult to read on a smaller screen. While using a tablet would do in a pinch, CloudNine's numerous features and windows are much better suited to the larger screen of a desktop or laptop.

While CloudNine itself is platform independent (I primarily used it with Chrome on a Mac), the CloudNine Discovery client software required to load documents into CloudNine requires download and installation. Discovery Client only works on a Windows PC. I downloaded and installed the Discovery Client onto a PC and uploaded documents into my account.

CloudNine doesn't store your discovery documents using a public cloud service such as AWS but instead stores them on its own servers in a datacenter (a so-called private cloud).

User Experience and Interface
If you have used a document review platform in the past, you'll find CloudNine's interface familiar looking. After years of document review projects, I felt immediately comfortable. CloudNine has rightly decided to not reinvent the wheel for discovery software, instead tweaking certain aspects of the interface to make it more approachable and simpler.

For example, cases are listed in alphabetical order or by most recently accessed on the home dashboard. The document viewer is on the right side of the screen with the document review tools alongside on the left. Getting the hang of the metadata fields took me some trial and error, as well as guidance from CloudNine technical support.

Marquee Feature 1: Uploading Discovery Documents
The CloudNine Discovery uploa-ding tool noted above makes it simple to add documents to case folders for later review. I uploaded several batches, and the program instantly formatted and renamed the uploaded documents, placing them in a case folder. I received a confirmation email once the upload finished with details about the upload (number of documents, file types, etc.). CloudNine easily accommodates essentially any file type — my upload set including PowerPoint, PDFs, Text files, Excel documents, Word Documents, JPEGs, videos, and more. All files, such as the hundreds of MSG email files in my set, can be viewed in native format as well as in a formatted text reader view.

I also used the Early Data Assessment features to run a preliminary assessment of my materials — a useful approach for when you aren't sure what you have gathered and don't want to commit to actually storing it in the cloud and reviewing it. This is CloudNine's most straightforward and intuitive feature.

Marquee Feature 2: Analytics

CloudNine's Analytics feature offers an at-a-glance understanding of a document review batch, such as file types, keywords (words that appear most frequently in the documents), common website domains, and a document timeline. Clear visuals under the Analytics tab demonstrate which keywords turn up most frequently in a document set, allowing you to quickly zero in on any nonresponsive issues that can be filtered out and ignored. This valuable tool can help discovery teams shape their strategy.

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During review, administrators can keep track of the number of documents in a batch and the number of users on the team. Particularly useful is the ability to run a customized Audit Log Report to check for inconsistencies in review and tagging. This downloads as a CSV file and shows the actions taken by different reviewers on the project, such as their viewing, searching, and tagging.

In addition, you can view the history of any document, displaying a list of actions taken by other uses with respect to that item. On other platforms, this kind of data would require assistance from tech support. I would certainly prefer to catch issues in the review process earlier, rather than realizing at the end of a review that team members took completely different approaches to tagging.

Marquee Feature 3: Document Review

The review tools in CloudNine offer myriad options for filtering, searching, and tagging documents. You can search by keyword in any metadata field. I built my searches using commonsense dropdown menus, and I also saved helpful searches for later reuse. When I typed a word into the search bar, a menu dropped down telling me how many results would turn up with that term, previewing whether that search would prove successful. CloudNine provided me with its helpful Search Request Syntax cheat sheet, which offered a helpful refresher on setting up targeted Boolean search requests.

I liked the ease of applying persistent highlighting of selected terms in search results, and the ability to de-dupe documents with the click of a button (rather than needing to call tech support and have them charge me). I also appreciated the prominent icons noting whether a document had parents, related documents, or near-duplicates elsewhere.

During my litigation career, I spent hours of my time on the phone with technical support attempting to coordinate uploading, review, and production. In light of these experiences, I find the CloudNine self-service model incredibly refreshing.

The Metadata Index Report is a simple spreadsheet showing your custom metadata fields and tags across multiple documents. This report when circulated among a project team can demonstrate

progress and show the types of materials being turned up over the course of a review.

For small cases in particular, CloudNine enables you to do it all yourself, saving you time and money. For larger cases, CloudNine offers consulting services for collection and processing. CloudNine easily earns a TechnoScore of A-.

Marquee Feature 4: Document Production

CloudNine provides for bulk export of documents, including annotations, redactions, Bates stamps, custom labels like Confidential stamps, and more. The Bulk Export feature is available from the main tool bar menu, and allows you to select what document components to include — text, native files, metadata, and/or images.

I used the "Export Image" option, which enabled me to select whether or not to export with redactions, annotations, or custom Bates label prefixes and numbering. Documents can be renamed with their DocID numbers, and exported with metadata or with accompanying native files. You can output an image load file using TIFF or PDF. As is the case with document import, the export takes place in the background while you work elsewhere. Once export is complete, you receive a confirmation email that the export batch is ready for download.

What Makes It Great and What Needs Work

During my litigation career, I spent hours of my time on the phone with technical support attempting to coordinate uploading, review,

and production. In light of these experiences, I find the CloudNine self-service model incredibly refreshing. It puts power into the reviewer's hands, enabling you to customize your screen views, metadata, filtering, and production. The analytics tools provide simple visualizations of document batch contents, reducing surprises and confusion down the road. All the review tools you need for a well-organized document review are present and easy to use. CloudNine handles all of the most common document types found in today's discovery projects. Sorting through thousands of emails will be a breeze.

Of course, many document review platforms leave the technical aspects to in-house professionals rather than letting attorneys handle it themselves because it can become complicated. CloudNine is not completely intuitive, and getting started will require training with CloudNine support, contact with tech support for reminders of where certain features are located, and possibly a few frustrating moments.

While CloudNine provides free training and tech support to get you on your feet, a downside is that the hours for live support are only during business hours. In my experience, document review and production emergencies tend to wait for late evenings or weekends, and these limited support hours could result in headaches when working on tight deadlines.

Price
CloudNine offers two pricing options. The Pay-Per Use plan is based on the amount of data stored so it has no per-user fees but does have fees for processing and exporting. Prices for this plan are $35 per GB hosted per month, $35 per GB processed, and $35 per GB produced.

The Professional, Plus, and Premium plans are subscriptions that respectively cost $1,500 per month for up to 50 GB stored, $2,500 per month for up to 100 GB, and $4,500 per month for up to 225 GB. These plans include unlimited processing and exports so they'll save you money on long-term projects.

While the company provided me with a price chart and would presumably do the same for you, I would like to see a pricing calculator added to the website to provide more transparency and facilitate comparisons among the plans.

TechnoScore
On the whole, CloudNine's learning curve is a small price to pay for freeing yourself from dependence on expensive hourly technical support for every ediscovery task. For small cases in particular, CloudNine enables you to do it all yourself, saving you time and money. For larger cases, CloudNine offers consulting services for collection and processing. CloudNine easily earns a TechnoScore of A-.

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