



How to Get Started With Onna: A Step-by-Step Guide



Welcome!

We're excited you're ready to get started with Onna. In this step-by-step guide, you'll learn how to:

01. Set up an account in Onna
02. Create a workspace
03. Add a data source
04. Conduct a basic search
05. Export a basic search

ⓘ This guide is ideal for those who want to get started with our **"Pay As You Go"** self-service plan. If you're looking to gain greater visibility into your data and implement a long-term discovery solution, our Discovery and Enterprise plans might be more suitable for you. Reach out to us [here](#) if this sounds like you. If not, continue reading, we'll get you started in no time.

Before we dive in...



Onna is the world's **first Knowledge Integration Platform (KIP)** that unlocks enterprise knowledge from today's most popular workplace applications. We help law firms, service providers, and businesses automate their enterprise needs for eDiscovery, compliance, information governance and more in a single platform.

- We centralize otherwise fragmented and unutilized knowledge from any number of our connectors, like **Slack, G Suite, Microsoft 365, Box**, and [more](#) to get your information enterprise-ready.
- **Our open API** allows us to integrate with any cloud-based or on-premise platform, for **optimal control and visibility** into your most critical information.
- Once an organization's tech stack is connected to Onna, their potential is limitless. Teams can **unify, search, protect, automate, and build** on top of their proprietary knowledge to leverage it in new and intuitive ways.

FAQ's



What is a data source?

A data source is our connection to an external platform like Slack, G Suite, JIRA, or Confluence. You might also see them on our website as "Connectors." Connecting your data source is what allows us to cull, process, and index data, making it accessible and searchable. Click [here](#) to view our full list of data sources.



What is an open API?

Onna is built with an open API (Application Programming Interface) which allows us to connect and extract data from our data sources. APIs are essentially how platforms communicate and interact with one another, so having an open API means that any software developer or programmer can build an API of their own to connect with ours. Think of our API as the one-size-fits-all connection.

01. Setting up an Account in Onna



If you have a one-time discovery case or simply want to test out the platform, we offer a self-service **"Pay As You Go"** plan that you can try for 30 days free of charge. In the free trial, you can connect up to 10 data sources, store up to 100 MB of data, add up to two users (yourself and a colleague) and invite unlimited guests to collaborate. Plus, you can upgrade to our other plans or cancel at any time. After the 30 days are up, you'll pay a flat \$250 fee for two users and data storage month to month.

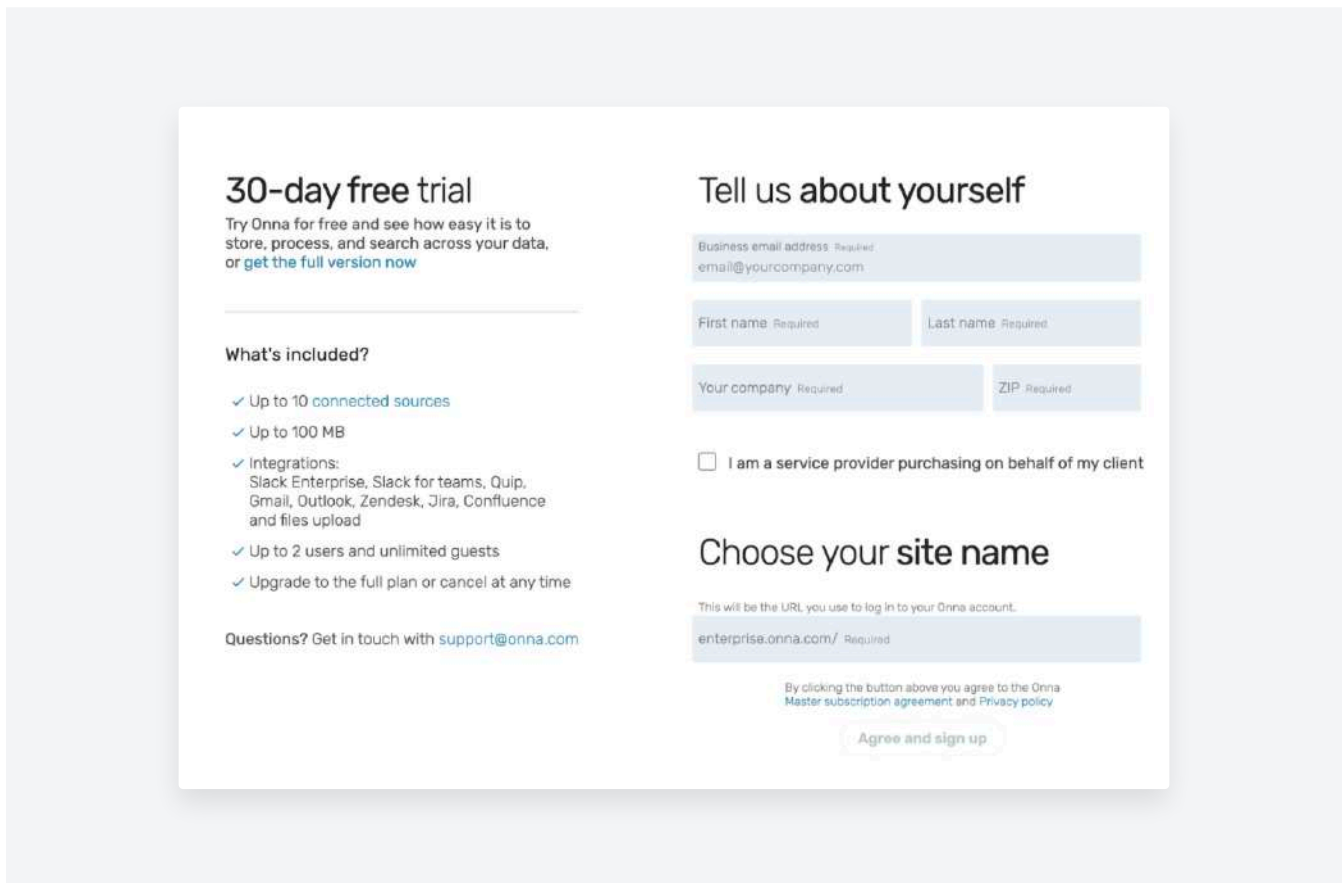
To set up your free trial of our self-service account, follow these steps:

1. Head to onna.com/pricing/ and click the **"Try it now for free"** button under the **"Pay As You Go"** plan.

The screenshot shows the Onna website's pricing page. At the top, there is a blue navigation bar with the Onna logo, menu items for SOLUTIONS, PLATFORM, RESOURCES, and SIGN IN, and a 'Book A Demo' button. Below the navigation, three pricing plans are displayed: 'Pay As You Go', 'Discovery', and 'Enterprise'. The 'Pay As You Go' plan is highlighted with a white background and a green 'Try it now for free' button. It features a price of '\$250 for 2 Users' and 'and up to 25 GB of processed data'. The 'Discovery' plan is described as 'The complete eDiscovery package' and includes features like granular search, full metadata extraction, and custom user permissions. The 'Enterprise' plan is described as 'A fully stacked data management environment' and includes features like retention policy, file versioning, and premium support. Each plan has a 'Contact Sales' button.

01. Setting up an Account in Onna

2. Fill out the **“Tell Us About Yourself”** section so we know who you are and how to reach you. If you’re a service provider using Onna on behalf of your client, don’t forget to check the box to indicate that. Next, choose your site name or the URL that will be used to log into your account. For example: **enterprise.onna.com/*your name here*** And finally, take a look at our master subscription agreement and privacy policy, and if you’re all set, click **“Agree and sign up.”**



3. You will then be taken to Onna’s home page. If for some reason this does not happen, you can always reach out to support@onna.com.

02. Creating a Workspace in Onna



The first thing you'll want to do once you're in the platform is create a **Workspace**.

A **Workspace** is a collaboration space for you to search and save data, as well as share and review important findings with colleagues.



Let's say you're working on a case called "ACME", you may name your workspace "ACME" to keep all of your data for that specific investigation in one place. You can also customize the workspace by sharing and searching across data sources and also exporting saved searches or all of the information in the data sources. Additionally, you can add members with different roles and user permissions.

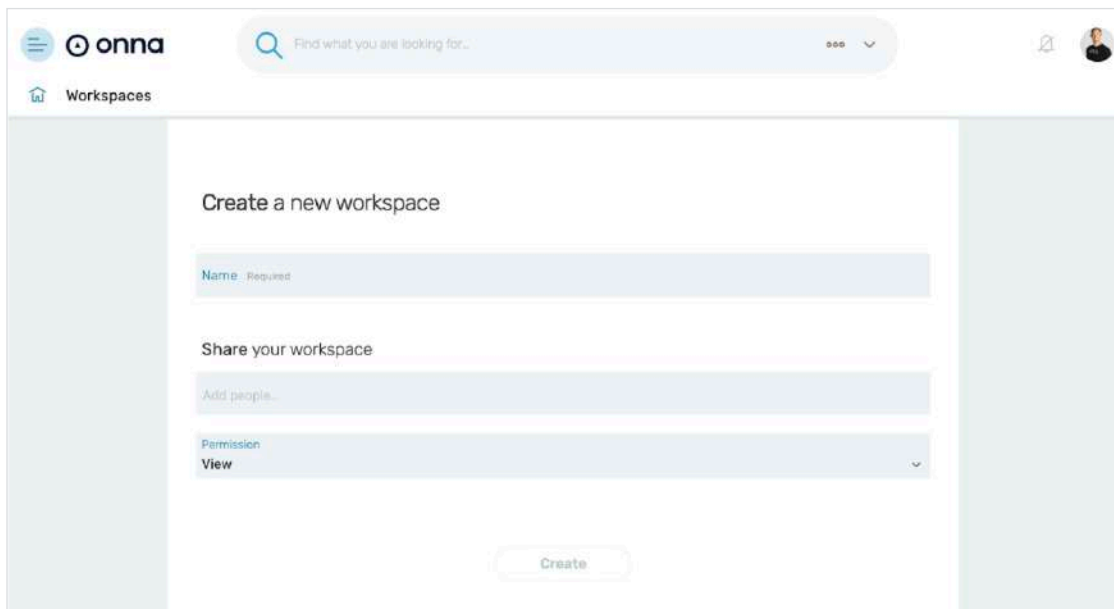
To create a workspace, follow these steps:

1. Head to the menu on the left-hand side and click "**Workspaces.**" You can also click the add button by hovering over "**Workspaces.**" If you have existing workspaces you'll be able to see a list of them by opening the menu.

Name	Tags	Shared with	Last updated	Size
ACME Contract Collection		ID AC AS +20	2/12/2020	11.25 MB
Competitive Intel		RG AS AK BW +22	2/25/2020	12.56 GB
Feedback		LD CS PM RG	9/17/2019	511.81 MB
Custodian Collection		DN HD	10/17/2019	10.12 GB
Matter CPSO		MC	2/26/2020	0
Legal Hold		EO CO	2/5/2020	263.52 KB

02. Creating a Workspace in Onna

2. Click **"Add Workspace."** You'll then be asked to name it and select whether you'd like to use a template. Individual users in Onna can also be granted access to the workspace by clicking on the **"Add people"** field. Permissions for the workspace can be adjusted by clicking on the **"Permission"** field. Once you've created your workspace, you'll be taken to the workspace home page.



The screenshot shows the Onna interface for creating a new workspace. At the top, there is a search bar with the text "Find what you are looking for..." and a user profile icon. Below the search bar, the "Workspaces" section is visible. The main content area is titled "Create a new workspace" and contains three input fields: "Name" (with a "Required" label), "Share your workspace" (with an "Add people..." label), and "Permission" (with a "View" label and a dropdown arrow). A "Create" button is located at the bottom center of the form.

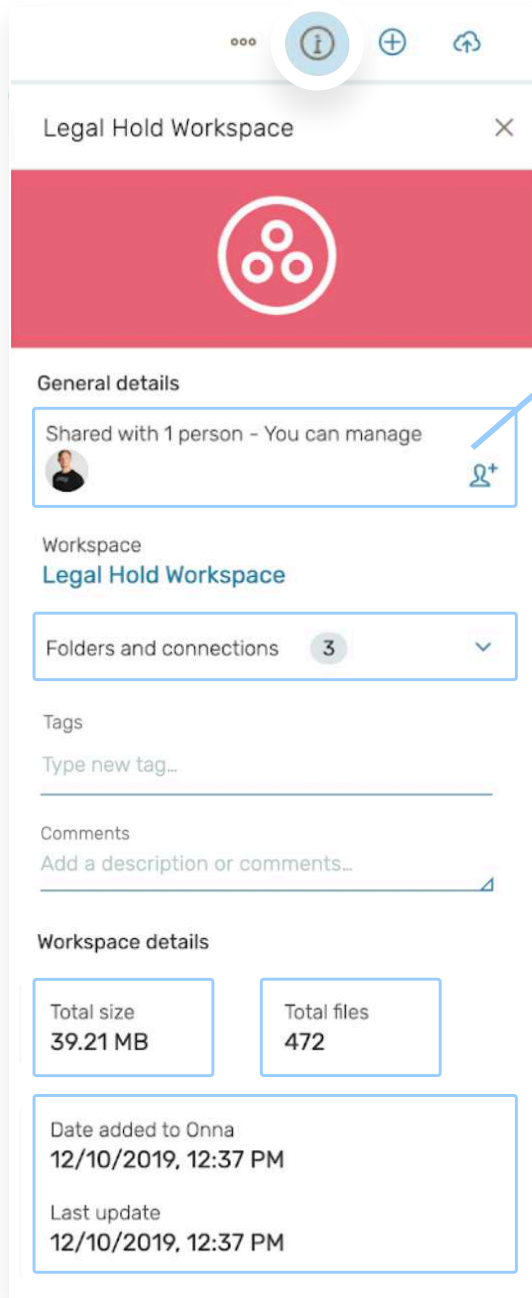


Note: Workspaces are always private, unless you give someone permissions to see the files within the platform.

3. The first screen will prompt you to **"Add a Source"** to get started. We'll get into exactly how to do that in the following section.

02. Creating a Workspace in Onna

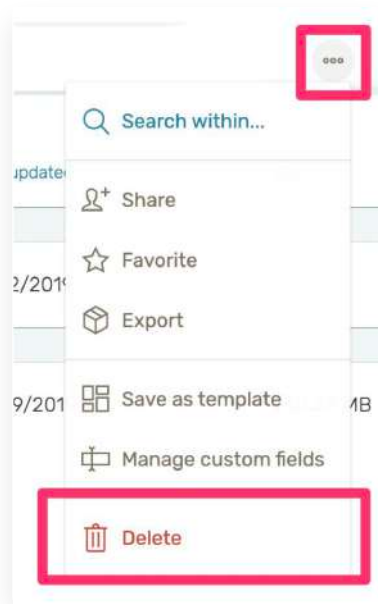
4. Once you've added sources to your workspace, you can also access the workspace detail panel. To view workspace details, first head to the information button on the workspace menu at the upper right hand side. Clicking on the **"Details"** button will reveal the following panel with a summary of the workspace information.



- The number of members and the type of Workspace user
- The folders and connections
- The number of files in the workspace
- The total size of the workspace
- The date the workspace was created and the date the workspace was last updated

02. Creating a Workspace in Onna

- ⊗ To close, click on the “X” on the upper right-hand side.
- ⊗ If you need to delete the workspace that was created, click on the three dots icon from either the Workspaces page or the workspace itself and click the “Delete” option:



Note: Any sources and files configured inside the workspace will also be removed.

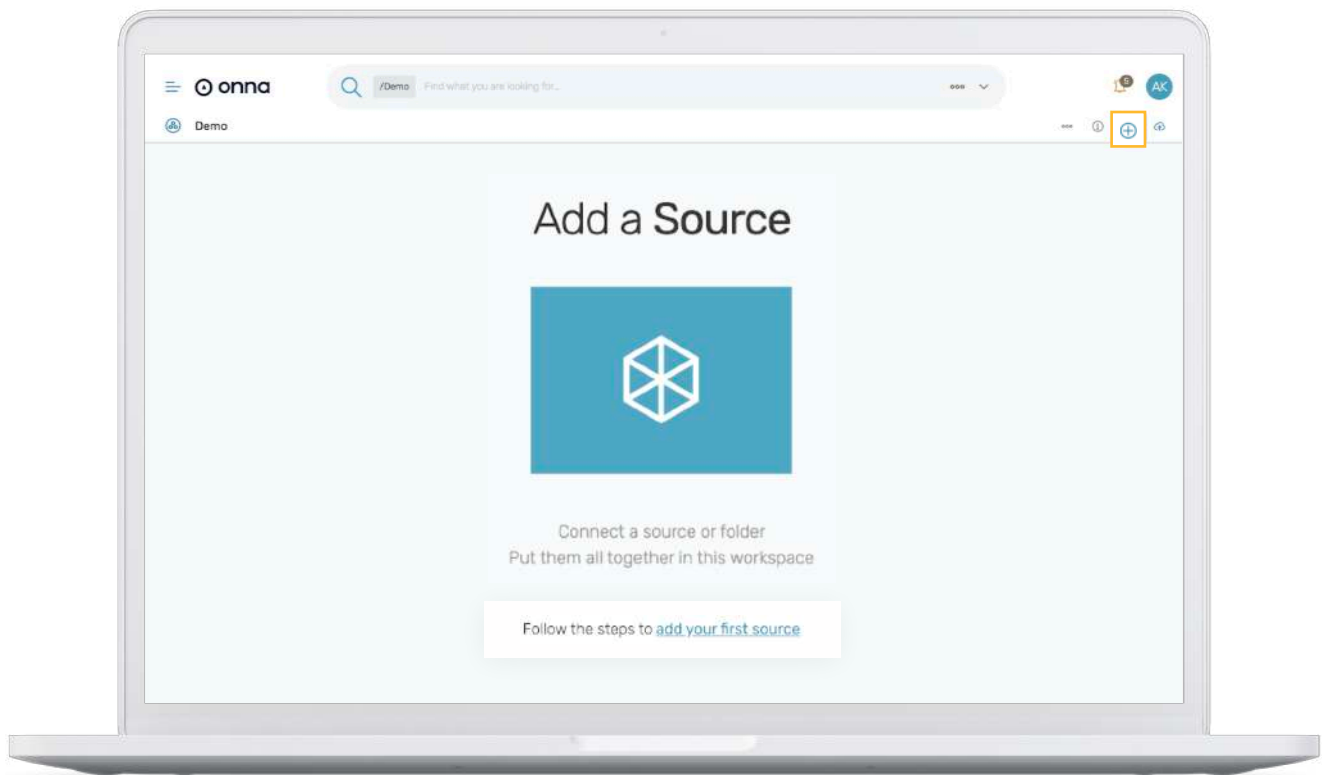
03. Adding a Data Source in Onna



Once you have your workspace set up, you will be prompted to add a data source to your workspace. Remember, you can add up to 10 data sources and store up to 100 MB of data with the free trial of the **"Pay As You Go"** plan.

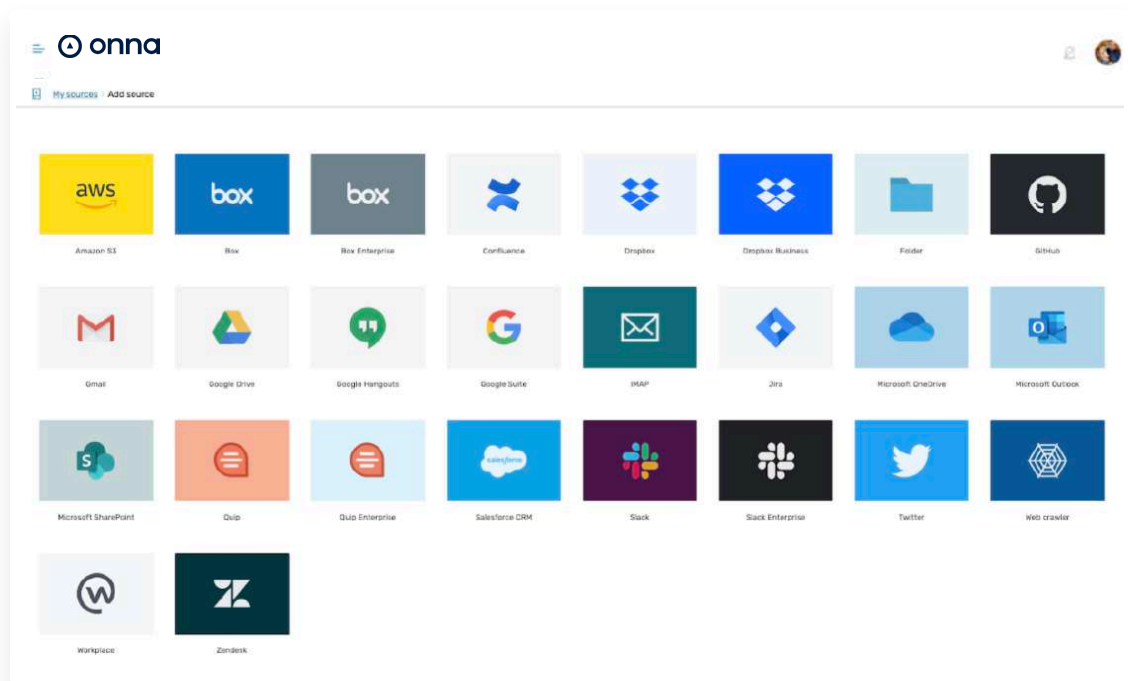
To add a data source to your workspace, follow these steps:

1. Click on **"Add Your First Source"** or the **Plus sign** at the top right corner of your workspace.



03. Adding a Data Source in Onna

- Next, choose the type of source you'd like to add, and follow the instructions for collecting from that source. Any source that you choose will take you through a standard authentication workflow in order to access the data from that source. For further details on each source go to our [Connectors](#) page.



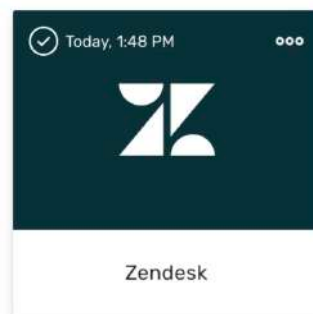
Note: Certain data sources can only be accessed by the company's admin. Check in on your company's preferences to ensure you have access.

03. Adding a Data Source in Onna

3. Once you add a source, you'll see the source begin to sync. You can check the status of the source using one of the status icons that appear on top of the source. The icons will look like this:

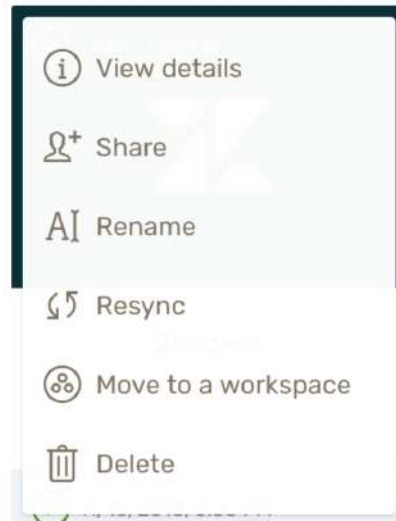


- **The dotted circle** indicates when the source is initiating the collection.
 - **The dotted circle with the checkmark** indicates when the source has finished collecting files but is still processing files.
 - **The full circle with the checkmark** indicates when a source has finished collecting files and is at least 80% finished processing files.
 - **The pause symbol** indicates when a source has been paused. Note: only available for source added through Onna's eDiscovery app.
 - **The alert symbol** indicates something has gone wrong with the sync. Errors can be related to the original source API not allowing a connection, an error with authentication, or an error while processing a file.
4. Once a source has completed its first sync it will show these details at the top of the card. Once you've completed the collection flow, your sources will show up in a section titled "**Connected Sources**" in your workspace. When you hover over a source, you'll see a menu symbol (three dots) appear on the right hand side of the card.



03. Adding a Data Source in Onna

5. Clicking on **the menu** will show you the following options for sources where you're an owner:



- **View Details** - This will take you to a details page for the source where you can see the source type, sync mode, sync time range, date added to Onna, date last synced, total size and total number of files.
- **Share** - Selecting this option will open a modal that allows you to share the source with a user or workspace.
- **Rename** - Use this option to rename your source.
- **Resync** - This option should only be used if the source has shown an error after a couple of files. Resyncs will start a sync from scratch so any files previously available will be deleted.
- **Move to a workspace** - This transfers ownership from you to a workspace. Once you do this you'll no longer be able to delete the source from your sources page.
- **Delete** - This deletes the source and the files within it. This action is irreversible.

04. Conducting a Search in Onna



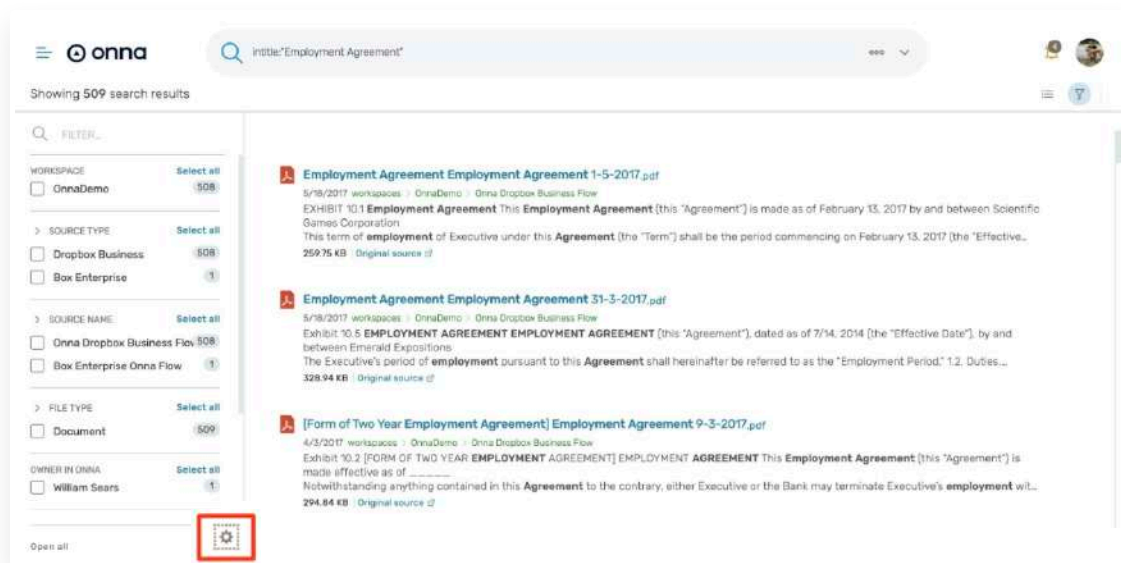
Now that your workspace is set up and data sources are added, you're ready to **conduct a basic search**. In this section, we'll cover how to use filters to refine your search results. However, we also support various [text modifiers](#) and [boolean search](#) for a more advanced experience.

To conduct a basic search, follow these steps:

1. Click on the **"Show Filters"** button on the right-hand side. The current filters will appear on the left-hand side of the results screen.



2. To configure filters to your preferences. Click on the **gear icon** at the bottom of the page to see the filters available. The filters available are on the following page.



04. Conducting a Search in Onna

Creation Date: Filter using a time range

CREATION DATE

- All Time
- Last 30 Days
- Last 60 Days
- Last 90 Days
- Custom

User: Filter content by user

USER

- Select all
- xxxxxx@onna.io 3424
- demo@onna.io 851

The number of files you have permissions to see from each user is displayed beside their email.

Extension: Filter by type of document

EXTENSION

[Select all](#)

- eml 32967
- pdf 1006
- png 76

Exception: Lists files with any exceptions

EXCEPTIONS

[Select all](#)

- No Text Content 85
- Excluded 1

Source Type: Filter by sources within Onna

> SOURCE TYPE

[Select all](#)

- Dropbox Business 6,207
- Microsoft Outlook 1,151
- Gmail 206

The number of files in each source is displayed beside the name. Click the arrow to see the rest of the options available.

Category: Filter by classification models

CATEGORY

[Deselect all](#)

- Contract 922

CONTRACT CONFIDENCE LEVEL

[Reset](#)50  100

From 50% to 100% of confidence

Tags: Filter by any tags you've added

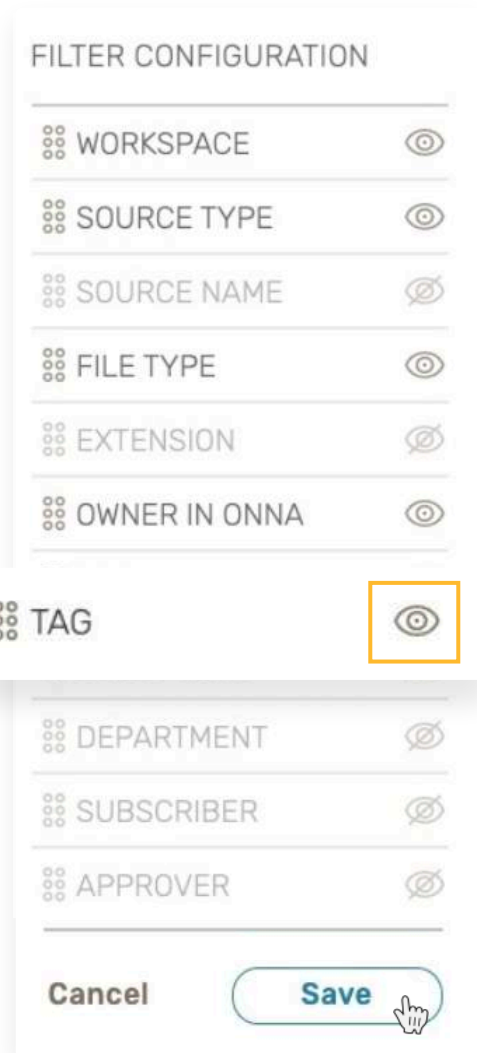
> TAG

[Select all](#)

- consulting agreement 5
- agreement 2
- severance agreement 2

04. Conducting a Search in Onna

- By clicking on the eye icon, you can choose whether these are visible or not within your filters.
- You can also **drag and drop** them in your order of preference with the two bars on the left-hand side.



3. **Save** any configuration changes you've made by clicking **"Save"** at the bottom of the page.
4. Once your filters are saved, use the **search bar** to find the data you're looking for.

Note: Some of these filters are only available if you're searching across all of your files. For instance, the workspace filter will not be available if you're conducting the search from within a specific source. Additionally, the amount of filters available in the drop down is limited to 200. For example, if you have 300 users and you filter on Participants, only the first 200 participants ordered by their number of files are available.

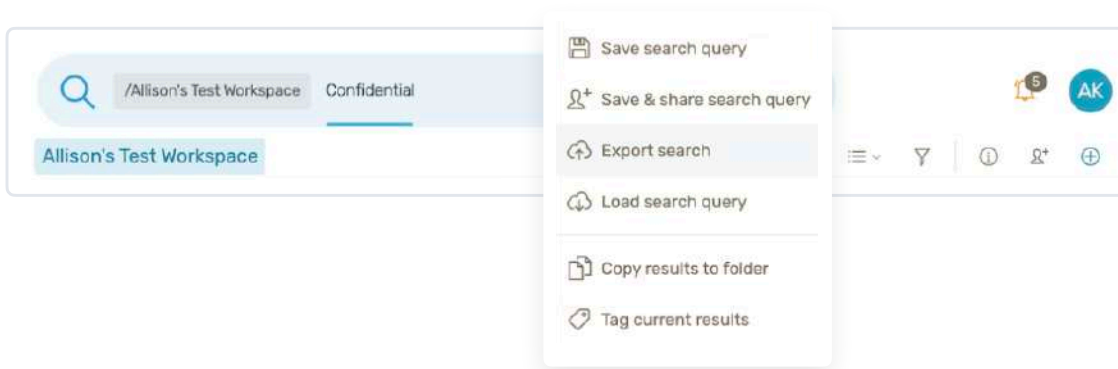
05. Export a Basic Search in Onna



Once you've found the results you're looking for, you can **export your basic search** into any review platform of your choice.

To export your basic search, follow these steps:

1. Click **the ellipsis** on the right-hand side of the search bar to expand the menu



2. Select **"Export search"** to be taken through the export configuration workflow. You can also select **"Save search query"** to save your results and export them later.

Other options on the menu include:

- Saving and sharing the current search query
- Loading a previously saved search
- Copying current search results to a folder
- Mass-tagging current search results (Note: this also includes mass-adding custom fields, but the ability to mass-remove custom fields is not yet available).



If you have any questions along the way, don't hesitate to reach out to us at support@onna.com or check out our [Help Center](#).

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