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RELEASE NOTES

Nuix Discover 10.0 Quarterly Release Notes (OP)

Nuix Discover

Nuix Discover 10.0 Quarterly Release Notes (OP)

This document provides an overview of the major new or updated features available to on-premises clients in this quarterly release. The quarterly release covers versions 9.9.010 – 10.0.009.

What's new for users

This release includes the following new or updated features.

Note: Your administrator must enable some of these features.
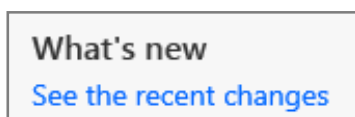
Nuix Ringtail is now Nuix Discover

In August of 2019, we officially changed the name of our eDiscovery application from Nuix Ringtail to Nuix Discover. This new name better describes the unique and powerful capabilities of our award-winning software and better aligns it with the rest of the Nuix product family, most notably Nuix Workstation and Nuix Investigate. Nuix Discover is a central part of the Nuix Total Data Intelligence platform and vision, which promises to improve collaboration, innovation, and knowledge management for organizations around the globe.

As a result of renaming Ringtail to Nuix Discover, the following changes were made in the user interface:

- After you log in, the navigation bar at the top of all pages displays the Nuix Discover logo and name.
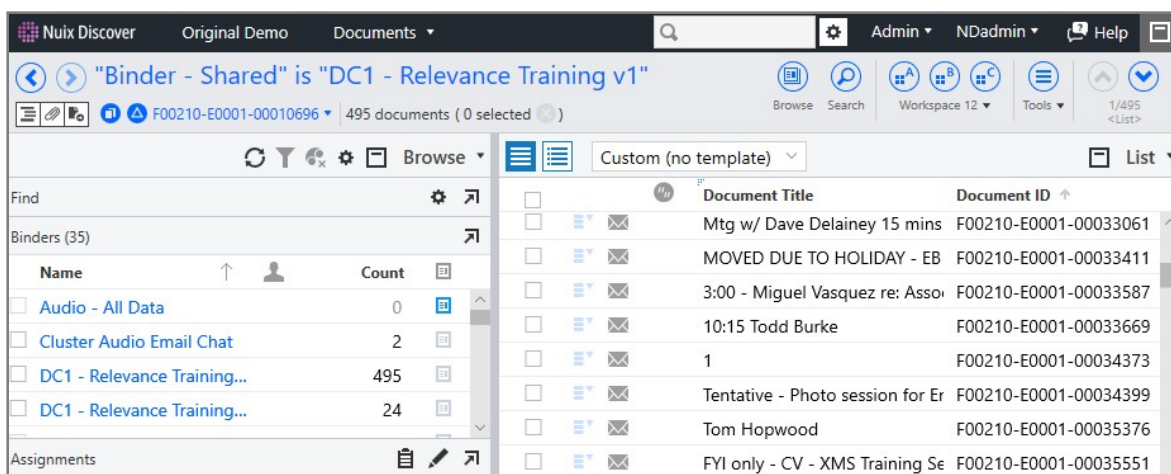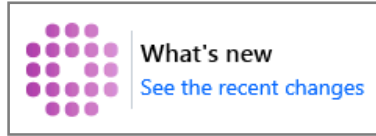

- The **What's new in Ringtail** section on the **Portal Home** page is now named **What's new**.
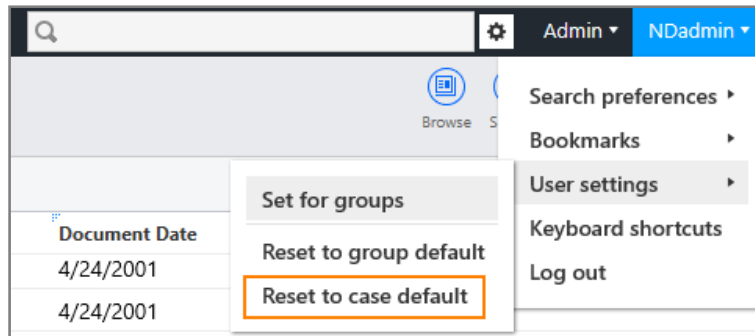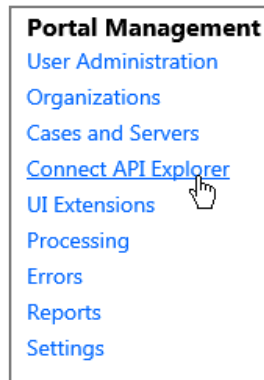
- The **What's new in Ringtail** section on the **Case Home** page is now named **What's new** and displays the Nuix Discover logo.

- On the user name menu, under **User settings**, the **Reset to Ringtail default** menu option is now named **Reset to case default**.

- The **Ringtail Connect API Explorer** is now named **Connect API Explorer**.

Audio pane: Select a language model to use for transcription

You can now specify the language model to use for transcription. For example, if you know that the audio in a file uses British English instead of American English, you can select English (UK) as the source language before you transcribe the audio file.

To specify the language model for an individual file, select a file, and then click the **Transcribe audio** button in the **Audio**
pane. In the **Transcribe audio** dialog box, select an option from the **Language model** list, and then click **OK**.
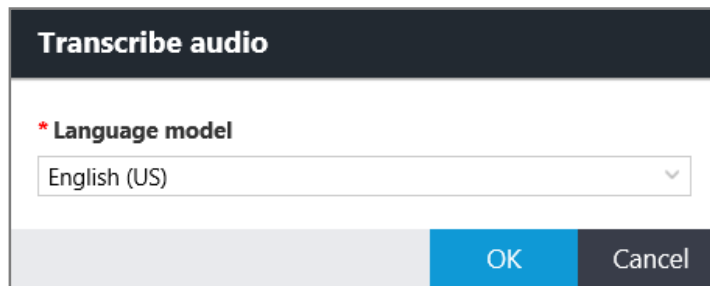
To specify the language model for multiple files, select the files. On the **Tools** menu, select **Transcribe audio**. In the **Transcribe audio** dialog box, select an option from the **Language model** list, and then click **OK**.
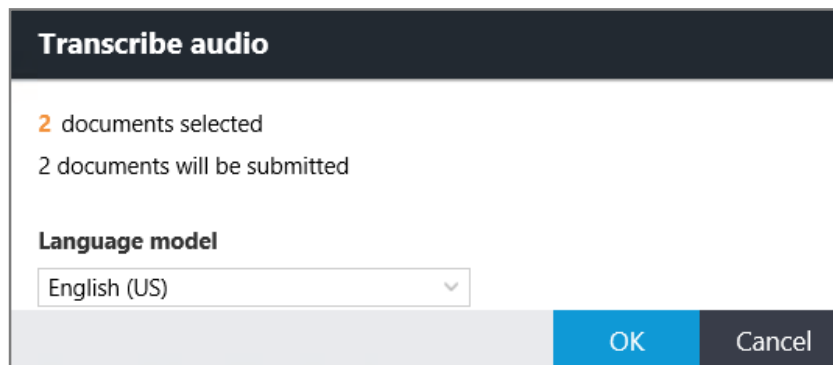
You can select one of the following audio language models:

- Arabic (Modern Standard)
- Brazilian Portuguese
- Chinese (Mandarin)
- English (UK)
- English (US)
- French
- German
- Japanese
- Korean
- Spanish

Audio pane: Resubmit transcribed audio file

If you accidentally selected the wrong language model when you transcribed an audio file, you can click the **Transcribe audio** button in the **Audio** pane to resubmit the transcription using a different language model, as shown in the following figure.

Note: This functionality is not yet available for multiple files using the **Tools** > **Transcribe audio** option.
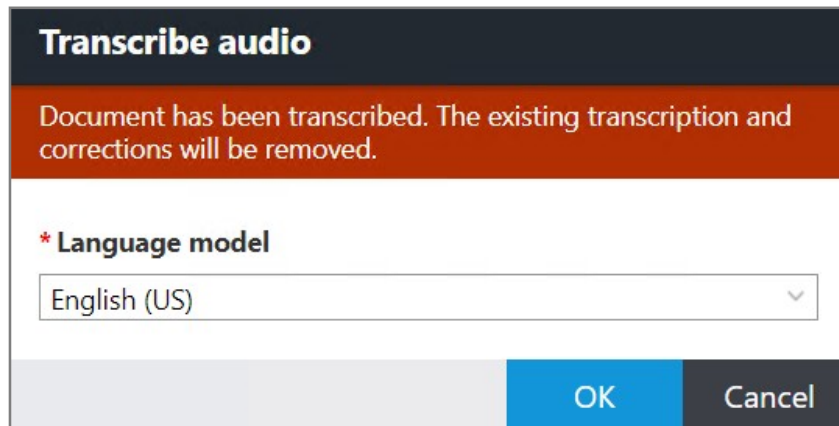
Note: You cannot re-transcribe a file that has annotations. Delete the annotations first.

Track the history for documents viewed and downloaded

In the **Document view history** dialog box, you can see how many times on a given day that a user viewed or downloaded a document in the **View** pane or downloaded a document in the **Code** pane.

To open the **Document view history** dialog box, in the **View** pane, select the **Document view history** option from the **View** pane menu. Alternatively, if you pinned this option to the **View** pane toolbar, click the **Document view history** button.
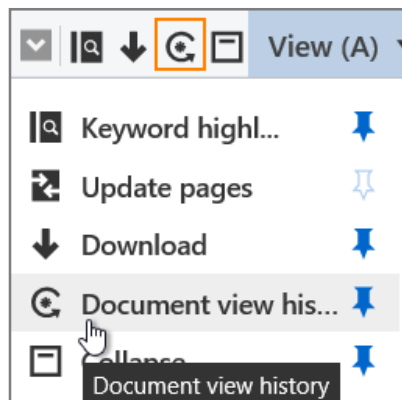
In the **Document view history** dialog box, each document viewing event appears on a new row. If a user downloaded a document, a dot appears in the **Downloaded** column.

The downloaded report also includes this information.

What's new for case administrators

The following new or updated features are available to case administrators in this release. Some features are also available to group leaders.

Coding History: Case administrators can see all records regardless of group membership and security

Case administrators can see all history records, including records for deleted objects, in the template views in the **Coding History** pane, regardless of their group membership and the group security settings for objects such as binders, fields, or productions.

Analysis > Mines: Grant group leaders administrative rights to mines

Administrators can now grant administrative rights to mines to group leaders. Previously, only administrators could manage mines.

To grant group leaders administrative access to mines, on the **Security** > **Administration** page, in the **Leaders** column, set the **Analysis – Mines** function to **Allow**, and then click **Save**.

Once group leaders have been granted access to manage mines, they can perform the following tasks:

- Add, delete, rebuild, edit properties, and manage security for mines.
- Access the **Security** > **Objects** page for mines to set the permissions for groups.

Case Setup > Fields > Items: Prompt when renaming or deleting pick list items that are coded to documents

On the **Case Setup** > **Fields** > **Items** page, if you try to delete a pick list item that is coded to a document, the **Delete selected items** dialog box appears with a warning message. You are prompted to confirm the action before you can proceed.
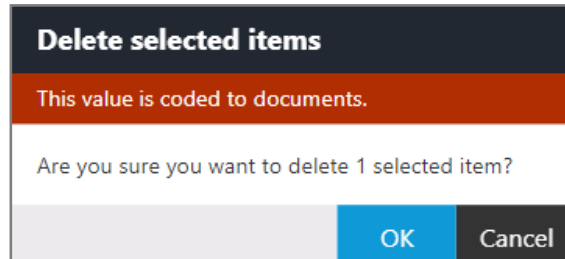
If you try to rename a pick list item, if documents are coded to the item, a warning message appears in the **Modify field value** dialog box. After you click **OK**, inline editing is enabled.
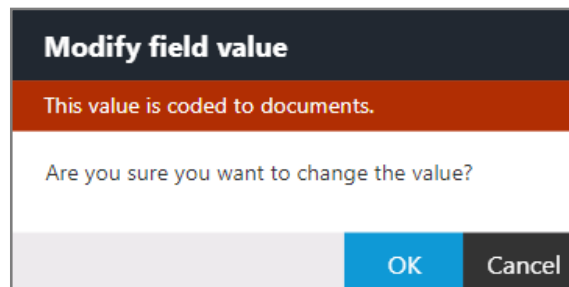
If you try to rename a pick list item, if no documents are coded to the item, inline editing is enabled.

Case Setup > System Fields: New system field for Audio Language Model

A new system field named **Audio Language Model** is available on the **Case Setup** > **System Fields** page.

Note: The application disables this field for groups by default, and you cannot grant groups write access to this field. The application populates this field after a user submits an audio transcription from the **Audio** pane or the **Tools** >**Transcribe audio** menu. The field value is the name of the language selected in the **Language Model** list for the audio transcription.
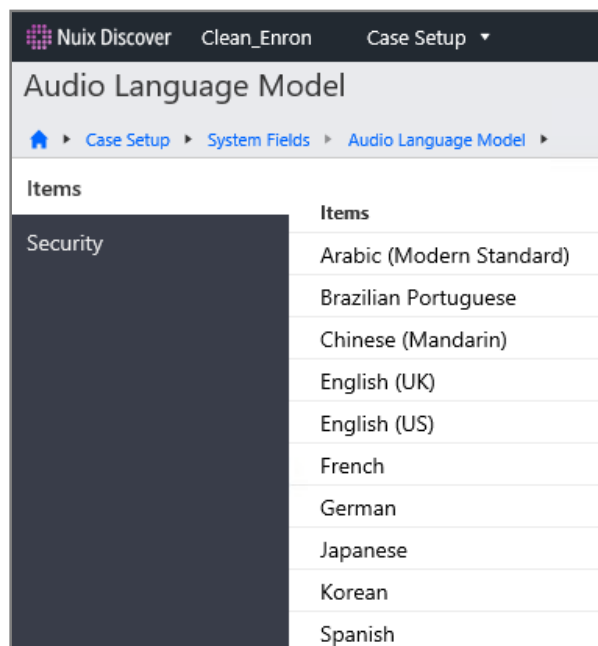
Manage Documents > Ingestions: Support up to 10 levels

Administrators can now select up to ten levels on the **Levels** page in the **Default settings** window for **Ingestions**. For each level, you can select one of the following options:

- **Constant:** Enter a static value into the box.
- **Select a field:** A list appears that allows you to select a field. You can select any one-to-one field that is selected
- **None**
- **Existing levels:** Select a level that already exists for the case.

Manage Documents > Ingestions: NIST list updated - June 2019

In the **Default Settings** window for Ingestions, users can choose to exclude files that appear in the Reference Data Set (RDS) provided by the National Software Reference Library (NSRL), which is maintained by the National Institute of Standards and Technology (NIST). This is commonly referred to as the "NIST list." Ingestions now uses the most recent version of this list, released in June 2019. You can view the list at the following link: https://www.nist.gov/itl/ssd/software- quality-group/nsrl-download/current-rds-hash-sets.

Manage Documents > Ingestions: Add advanced setting for email files

The **Email Files** page is now available in the **Advanced Settings** window of the Ingestions feature. On this page, users can select the type of file that is available in the viewer for imported email files.

To select the correct file type, choose an option in the **Files to include for email data** list. The default type for new and existing cases is **MHT**. If you select this option, emails are rendered in the same way as before this new setting was introduced. You can also select **MSG/EML with attachments**. This option includes embedded attachments as part of the email document. Processes such as indexing, imaging, and export include any embedded attachments when acting on the email document.

You can view this setting for an existing imaging job on the **Properties** page. The **Email files** value appears at the bottom of the page.

Note: We expect to add an option for MSG/EML without attachments in the future. We also expect to add an option to use the MHT rendering for searching and review while preserving an MSG/EML copy for export and production.

Manage Documents > Ingestions: Settings added to the Properties page

The following information has been added to the **Properties** page for Ingestions.

- **Source encoding:** The source encoding value selected in the **Advanced settings** window for ingestions.
    - o **Password bank:** If the administrator did not select a **password bank** for ingestions in the **Advanced settings** window, the value displayed in this row is No. If the administrator selected a password bank, the value is Yes.
- **Chat settings:** The following information is available in this section:
    - o **Idle time:** Threads are broken into separate documents if the difference in sent times between two messages is equal to or greater than this number.
    - o **Minimum messages:** Threads containing fewer messages than this number are not broken out into separate documents.
    - o **Maximum messages:** Threads containing more messages than this number are broken out into separate documents.

Manage Documents > Ingestions: Chat: For documents in split threads, display the message counts for the thread in parentheses

In previous versions, when using Ingestions on chat thread documents, the count of messages at the top of the HTML for chat data was misleading for documents that were part of split threads.

In this version, the count of messages for each participant appears in parentheses after the total count of messages in the thread.

For example, if there are 17 messages from participant A in the thread, and 5 messages from participant A in a document that is part of the thread, the MSG column for participant A would contain a value of 17 (5). If a document is not from a split thread, the count in parentheses does not appear.

Manage Documents > Ingestions: Improved handling of missing files in the ingest_temp folder during file transfer

In previous versions, the application could not complete the transfer of files during the ingestions process if any files were missing from the ingest_temp folder. This would often occur when files were quarantined by virus scanning software. In those instances, the application could not complete the ingestions job without manual intervention. With this release, if files cannot be copied because they do not exist in the ingest_temp location, the application does the following:

- Creates a slipsheet for any missing file with the text **"File not available to copy."** Copies the slipsheet to the proper location in the images folder and references the slipsheet in the main_pagestable.
- Codes the document with a value of **"File Copy Failed"** in the **[Meta] Processing Exceptions** field.
- Codes the document with a value of **"File not available in temporary folder"** in the **[RT] Ingestions Exception Detail** field
- Updates the **[Meta] File Extension - Loaded** field with a value of **"pdf."**
- Codes the **[Meta] File Extension - Original** field with the extension of the original file.

Manage Documents > Load File Templates: Field name suffixes removed in the Variable Builder

In the **Variable Builder** for load file templates, the names of the field types (DATE, MEMO, NUMB, PICK, TEXT, YES/NO) no longer appear in the **Name** column.
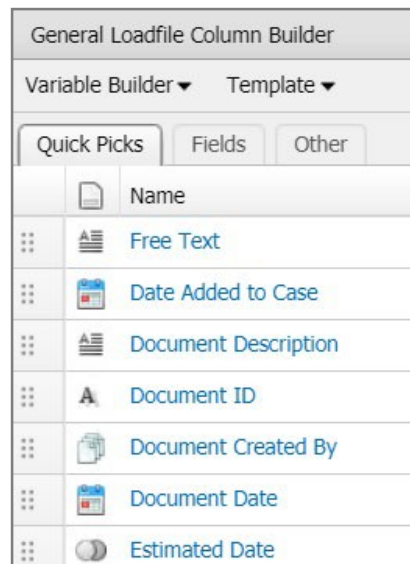
What's new for portal and system administrators

The following new or updated features are available to portal and system administrators in this release.

Portal Management > Cases and Servers: Only system administrators can disconnect a case
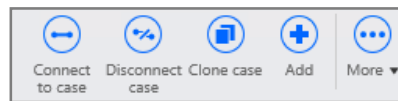
On the **Portal Management** > **Cases and Servers** page, the **Disconnect case** button on the toolbar appears only for system administrators. Previously, portal administrators also had access to this feature.

Portal Management > Cases and Servers: Assign logical database names to cloned cases

In previous releases, when cloning a case, the application created database files using the name of the source case that was cloned, rather than the name of the new case. The database file names are now based on the name of the cloned case, not the original case.

Portal Management > Reports: Enhancements to the Portal Summary Report

The following enhancements and changes are available in the Portal Summary Report on the **Portal Management** > **Reports** > **Summary** page:

- **Recent user activity** list:
    - The list now shows activity for the last 30 days. The list used to show activity for the last 7 days.
    - For failed logins, the login date and time appear in red font.
    - The **Sessions** column has been renamed to **Cases** and shows the number of cases that the user logged in to in the last 30 days. If the user did not log in to any cases, the value is zero (0).

Tip: Hover over a row in this column to display a tooltip that shows the case name and the last accessed date for all cases in the organization that the user accessed in the last 30 days. See the following figure for an example.

Portal Management > Reports > Summary: New Settings feature to include or exclude data for deleted cases

A new **Settings** button is available on the toolbar on the **Portal Management** > **Reports** > **Summary** page.

Click the **Settings** button to open the **Settings** dialog box. By default, data for deleted cases is excluded from the reports. To display data for deleted cases, select the **Include** option.
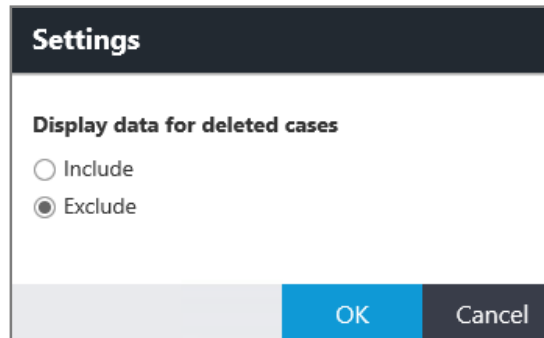
If the **Exclude** option is selected, the data for deleted cases does not appear in the following sections on the **Reports** > **Summary** page:

- The **Cases** bar chart (**Total** column)
- The **Recent user** activity table
- The **Hosted data** table and chart

Note: Below the chart in the **Hosted data** section, a message also indicates if the data for deleted cases is included or excluded.
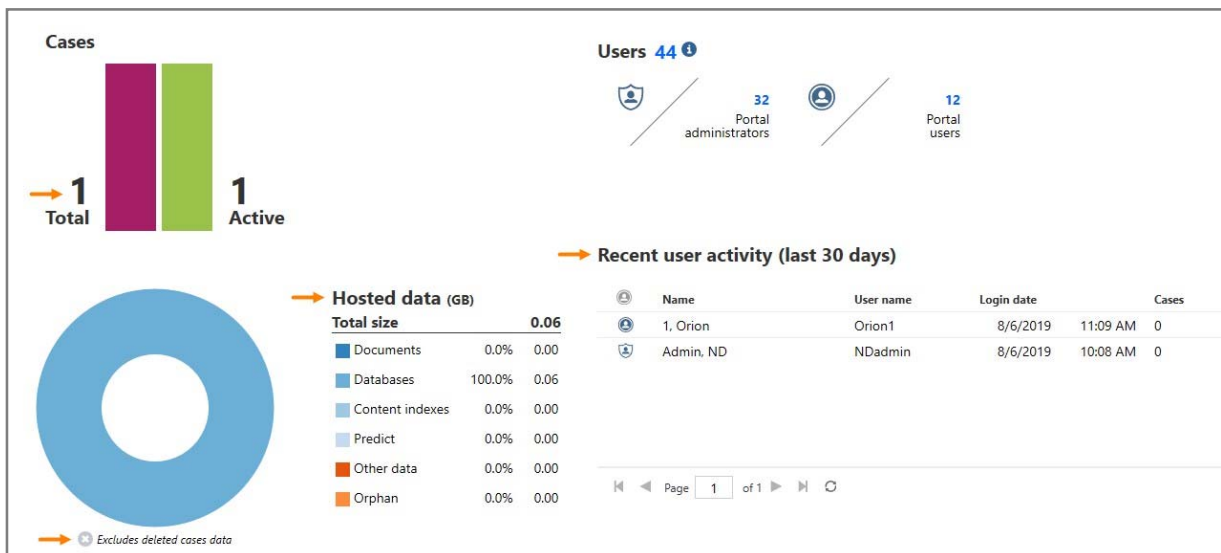
Portal Management > Settings: Enable telemetry logging from the portal database

You can write telemetry logging data to the portal database. This logging data includes all usage metrics and application errors for a portal.

The following settings are available on the **Portal Management** > **Settings** > **Log Options** page, as shown in the following figure.
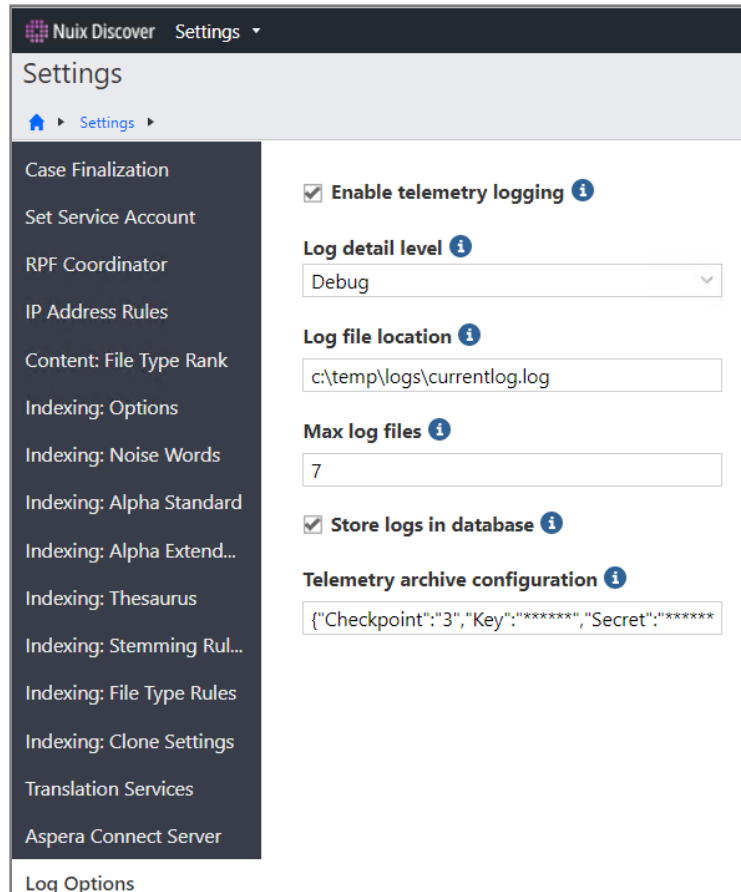
- **Enable telemetry logging:** Select this check box to enable logging for the portal.
- **Log detail level:** Select an option to adjust the level of detail captured in the log: **Error**, **Info**, **Debug**, or **Trace**.
- **Log file location:** If you provide a location, the telemetry data is stored in physical files on the web servers.
- **Max log files:** Provide a value to indicate the number of archive [.archive.log] files to keep on the web servers.
- **Store logs in database:** Select this check box to store log data in the portal database. If selected, an RPF job pushes the data to S3 and cleans up the database table per the configuration setting indicated in the **Telemetry archive configuration** setting.

Note: If this option is selected, and the **Telemetry archive configuration** setting is *not* configured, then no log entries will be deleted from the database table.

- **Telemetry archive configuration**: The information in this setting controls the frequency of when the RPF job runs to upload log entries from the database table to S3 and clean up the portal database. This setting is a JSON string with the following fields:

  ```
  {
  "Checkpoint": "0",
  "Key": "AWS key",
  "Secret": "AWS secret key",
  "Region": "AWS region",
  "Bucket": "AWS S3 bucket name",
  "CleanupMaxDays": 30,
  "ScheduleId": null,
  "IntervalInMinutes": 60
  }
  ```

  - **Checkpoint:** Default to 0. This holds the value of the last successful upload to S3.
  - **Key:** AWS key
  - **Secret:** AWS secret key
  - **Region:** AWS region
  - **Bucket:** AWS S3 bucket
  - **CleanupMaxDays:** Cleans up database records that are older than this value.
  - **ScheduleId:** Defaults to null. This will be set by the RPF job and should not be modified manually.
  - **IntervalInMinutes:** Defaults to 60. This sets the frequency, in minutes, for the RPF scheduled job.

- The **Log Options** page also includes the following additional changes:
  - The following two syslog options were removed:
    - **Ringtail syslog server name**
    - **Ringtail syslog server port**
  - Some options were renamed as follows:
    - **Log enabled > Enable telemetry logging**
    - **Log level > Log level detail**
    - **Log location > Log file location**
    - **Max Archive Files > Max log files**
    - **Database log enabled > Store logs in database**

What's new for developers

The following new features are available to developers in this release.

Import API

There are three new mutations in the Connect API for importing documents into a case: createImportJob, addDocumentsForImportJob, and submitImportJob.

Create an import job

You can create an import job in a case using the createImportJob mutation. This mutation returns the rdxJobID, which is used in the next mutation to add documents to the import job. This mutation also allows you to configure some job-level settings.

Sample mutation:

```
mutation {
  createImportJob (
    caseId:26,
    options:{
      name:"My Import Job",
      description:"Import job description",
      level:"Imports/Custodian A/0001",
      docsPerLevel:1000
      updateGroupCoding:true
    }
  )
  {
    rdxJobId
  }
}
```

Sample response:

```
{
  "data": {
    "createImportJob": {
      "rdxJobId": 319
    }
  }
}
```

Configurable options:

- name: String is the name of the import job. If you do not provide a value for this option, the job name is "Import from API."
- description: String is the description of the import job. If you do not provide a value for this option, the job description is "Import from API."
- level: String determines the root level to put documents in. If you do not provide a value for this option, the level is "API/{ImportID}/0001." Level values assigned to documents in the addDocumentsForImportJob mutation override this setting.
- docsPerLevel: Intdetermines the maximum number of documents per level. If you do not provide a value for this option, the value is 1000.
- updateGroupCoding: Boolean updates the group coding fields (All Custodians, for example) for new documents in this import and any existing or future family duplicate documents. If you do not provide a value for this option, the value is "false."

Add documents to an import job

You can use the addDocumentsForImportJob mutation to add documents to an import job that was created using the createImportJob mutation. Each addDocumentsForImportJob mutation allows you to add up to 5000 documents. To add additional documents to the job, run multiple mutations with different documents.

Note: When defining the path value for pages and contentfiles, the path is relative to the "import" folder in the Image file repository defined for the case.

For example, if the path is defined as follows:
path:"Imports||Media0001|||Images||0001||DOC-00000001.tif"

then the file should be located at:
{Image file repository}|import|{case name}|Imports|Media0001|Images|0001|DOC-00000001.tif.

Sample mutation:

```
mutation {
  addDocumentsForImportJob (
    caseId:26,
    rdxJobId:319,
    documents:[
      {
        documentId:"DOC-00000001",
        hash:"qwer1234asdf5678zxcv1234qwer5678",
        familyhash:"poui1234asdf5678zxcv1234qwer5678",
        level:"Imports/Custom/0001",
        parentId:"",
        sourceattachmentaction:Delete,
        pageaction:InsertUpdate
        mainfields:[
          {
            name:DocumentDate,value:"2019-01-03",action:Update
          },
          {
            name:DocumentType,value:"Microsoft Outlook Message",action:Update
```

```
        },
        {
            name:DocumentTitle,value:"Re: Your message",action:Update
        },
        {
            name:DocumentDescription,value:"",action:Delete
        },
        {
            name:EstimatedDate,value:"False",action:Update
        }
    ],
    fields:[
        {

name:"Custodian",onetomany:false,type:PickList,action:InsertUpdate,values:"Cust
odian A"
        },
        {
            name:"[Meta] Processing
Exceptions",type:PickList,action:InsertUpdate,values:["Corrupted","Empty File"]
        },
        {
            name:"[Meta] File
Name",onetomany:false,type:Text,action:InsertUpdate,values:"Re: Your
message.msg"
        },
        {
            name:"[Meta] File
Path",onetomany:false,type:Memo,action:InsertUpdate,values:"C:\\Downloads\\Emai
l"
        },
        {
            name:"[Meta] File
Size",onetomany:false,type:Number,action:Delete,values:"1592"
        },
        {
            name:"[Meta] Date
Sent",onetomany:false,type:DateTime,action:InsertUpdate,values:"2019-01-03"
        },
    ],
    correspondence:[
        {

type:"From",people:"acustodian@example.com",orgs:"example.com",action:InsertUpd
ate
        },
        {
```

```
            type:"To",people:"bsmith@example.com",action:Append
        },
        {

type:"CC",people:["kjohnson@example.com","ewilliams@example.com"],action:Insert
Update
        }
    ],
    pages:[
        {
            pagenumber:1,pagelabel:"DOC-
00000001",path:"Imports\\Media0001\\Images\\0001\\DOC-00000001.tif"
        },
        {
            pagenumber:2,pagelabel:"DOC-
00000002",path:"Imports\\Media0001\\Images\\0001\\DOC-00000002.tif"
        }
    ]
    ,
    contentfiles:[
        {
            path:"Imports\\Media0001\\Natives\\0001\\DOC-00000001.mht"
        }
    ]
},
{
    documentId:"DOC-00000003",
    hash:"6425hyjkasdf5678zxcv1234qwer5678",
    familyhash:"poui1234asdf5678zxcv1234qwer5678",
    level:"Imports/Custom/0001",
    parentId:"DOC-00000001",
    sourceattachmentaction:InsertUpdate,
    pageaction:InsertUpdate
    mainfields:[
        {
            name:DocumentDate,value:"2019-01-02",action:Update
        },
        {
            name:DocumentType,value:"Microsoft Word",action:Update
        },
        {
            name:DocumentTitle,value:"WordDoc.docx",action:Update
        },
        {
            name:DocumentDescription,value:"Sample description",action:Update
        },
```

```
          {
            name:EstimatedDate,value:"False",action:Update
          }
        ],
        fields:[
          {

name:"Custodian",onetomany:false,type:PickList,action:InsertUpdate,values:"Cust
odian A"
          },
          {
            name:"[Meta] File
Name",onetomany:false,type:Text,action:InsertUpdate,values:"WordDoc.docx"
          },
          {
            name:"[Meta] File
Path",onetomany:false,type:Memo,action:InsertUpdate,values:"C:\\Downloads\\Emai
l\\Re: Your message.msg"
          },
          {
            name:"[Meta] File
Size",onetomany:false,type:Number,action:InsertUpdate,values:"74326"
          },
          {
            name:"[Meta] Date
Modified",onetomany:false,type:DateTime,action:InsertUpdate,values:"2019-01-02"
          },
        ],
        pages:[
          {
            pagenumber:1,pagelabel:"DOC-
00000003",path:"Imports\\Media0001\\Natives\\0001\\DOC-00000003.docx"
          }
        ]
      }
    ]
  )
  {
    documentCount
  }
}
```

Sample response:

```
{
  "data": {
    "addDocumentsForImportJob": {
      "documentCount": 2
    }
  }
}
```

Configurable options:

- documentId: String! imports the Document ID of the document.
- hash: String imports the individual MD5 hash value of the document. This value is added to the [RT] MD5Hash field in the case.
- familyhash: String imports the family MD5 hash value of the document. This value is added to the [RT] Family MD5 Hash field in the case.
- level: String, when set, overrides any level data set in the job options. Levels are not updated for existing documents.
- parentId: String is the parent document ID for the document that establishes a source/attachment relationship. The source/attachment relationship is either updated or deleted depending on the value set for sourceattachmentaction.
- sourceattachmentaction: SAAction determines which of the following actions to take for the parentId field:

    o Delete removes coding from the document for the field.
    o InsertUpdate inserts or updates the value(s) of the field.

- pageaction: Action determines which of the following actions to take on the pages:

    o Append appends the value(s) to the field. This applies only to one-to-many fields.
    o Delete removes coding from the document for the field.
    o InsertUpdate Inserts or updates the value(s) of the field.

- mainfields: [DocumentFieldParams] imports the following data into core document fields in the case.

    o name: DocumentField! is the name of the document field. The names correspond to the core document fields in the case: DocumentDate, DocumentDescription, DocumentTitle, DocumentType, EstimatedDate.
    o value: String determines which of the following values is populated in the document field.

        ▪ DocumentDate is the Document Date of the document. Format is YYYY-MM-DD.
        ▪ DocumentDescription is the Document Description of the document.
        ▪ DocumentTitle is the Document Title of the document.
        ▪ DocumentType is the Document Type of the document.
        ▪ EstimatedDate is the Estimated Date of the document. A Boolean value.

    o action: CoreAction! determines which of the following actions to take on the incoming field data:

        ▪ Update inserts or updates the value(s) of the field.
        ▪ Delete removes coding from the document for the field.
        ▪ Ignore ignores the value.

- fields: [FieldParams] imports the following data into fields in the case:
  - name: String! Is the name of the field. If the field exists, the existing field will be used. If not, the name is created with the field type indicated.
  - onetomany: Boolean defines whether the field is one to many.
  - type: FieldType! is the field type. The possible values are as follows:
    - Boolean allows you to set the value as Yes or No.
    - DateTime allows you to set the value in YYYY-MM-DD format.
    - Memo
    - Number
    - PickList
    - Text
  - action: Action! determines which of the following actions to take on the incoming data:
    - Append appends the value(s) to the field (only for one-to-many field types).
    - Delete removes coding from the document for the field.
    - InsertUpdate inserts or updates the value(s) of the field.
  - values: [String]! imports the value(s) for the field.
- correspondence: [CorrespondenceType] imports the following people and organization values for the document:
  - type: String! determines the correspondence type. Possible values are To, From, CC, or BCC.
  - people: [String] contains a list of people values.
  - orgs: [String] contains a list of organization values.
  - action: Action! determines which of the following actions to take on the incoming field data:
    - Append appends the value(s) to the field (only for one to many field types).
    - Delete rmoves coding from the document for the field.
    - InsertUpdate inserts or updates the value(s) of the field.
- pages: [PagesParams] imports the following values for the pages associated with the document:
  - pagenumber: Int! is the page number.
  - pagelabel: String is the page label of the page.
  - path: String! is the location of the physical file to upload.
- Contentfiles: [ContentFileParams] imports the list of content files for the document.
  - path: String! imports the location of the physical file to upload.

Submit an import job

After adding documents to a job using the addDocumentsForImportJob mutation, you can run the import job using the submitImportJob mutation.

Sample mutation:

```
mutation {
  submitImportJob (
    caseId:26,
    rdxJobId:325
  )
  {
    rpfJobId
  }
}


Sample response:
{
  "data": {
    "submitImportJob": {
      "rpfJobId": 11805
    }
  }
}
```

Connect API Explorer: Only an API user can copy their own token and key

If a user has been authorized to use the API, only that user can copy their API token and key.

A new **API Access** page, shown in the following figure, displays the **API token** and **API key** with links to copy the token and key. Previously, the **API Access** page was available in the **Portal Management** > **User Administration** section.

Note: The **API Access** page is visible only if a user has been authorized to use the API.

To access the **API Access** page, on the **Portal Home** page, from the user name menu, select **Account Settings**. On the **Account Settings** page, in the navigation pane, select **API Access**.
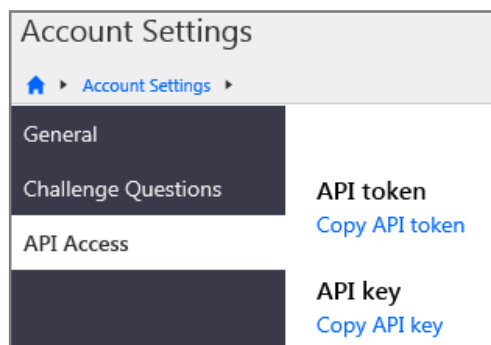
Installation and additional configuration notes

The following installation update is available in this release.

New download site for installers

Nuix has changed the download site for Nuix Discover (Ringtail) installers and documentation from the FTI e-delivery site (https://edelivery.ue.goringtail.com) to the **Nuix Customer Portal** (https://download.nuix.com/).

If you do not already have login credentials for the **Nuix Customer Portal**, please visit the **Nuix Support Portal** (https://nuix.service-now.com/support) and submit a ticket to request login credentials for the **Nuix Customer Portal** (https://download.nuix.com/).

NIST list updated - June 2019

In the **Default Settings** window for Ingestions, users can choose to exclude files that appear in the Reference Data Set (RDS) provided by the National Software Reference Library (NSRL), which is maintained by the National Institute of Standards and Technology (NIST). This is commonly referred to as the "NIST list." Ingestions now uses the most recent version of this list, released in June 2019. You can view the list at the following link: https://www.nist.gov/itl/ssd/software- quality-group/nsrl-download/current-rds-hash-sets.