



RELEASE NOTES

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# Nuix Discover 10.3 Quarterly Release Notes [OP]



# Nunix Discover 10.3 Quarterly Release Notes (OP)

This document provides an overview of the following major new or updated features available to hosted clients in this monthly feature release, which covers releases 10.2.010 - 10.3.010.

## What's new for end users

The following new or updated features are available to end users.

**Note:** Your administrator must enable some of these features.

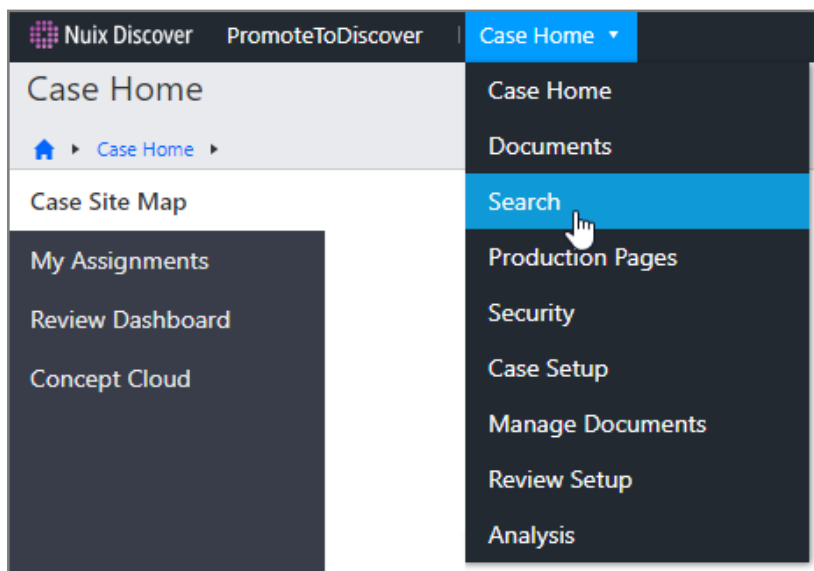
### Default start page for a group

Your administrator can now define the Nunix Discover page that appears for your group after you log in to the application. For example, if your administrator sets the start page for your group to be the **Documents** page, that page appears after you log in, and **Workspace A** appears.

### Case Home page menu: Search page option

The **Case Home** menu now includes a **Search** option, as shown in the following figure. Click **Search** to access the **Search** page.

**Note:** You can still access this page using the **Search** button on the toolbar on the **Case Home** or **Documents** pages.



## Translate: Propagate translated text to duplicate documents

When you submit a document for translation, the translated text is propagated across all duplicates of the document, so that you do not have to translate each duplicate document individually.

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**Note:** The application does not translate documents with branded redactions.

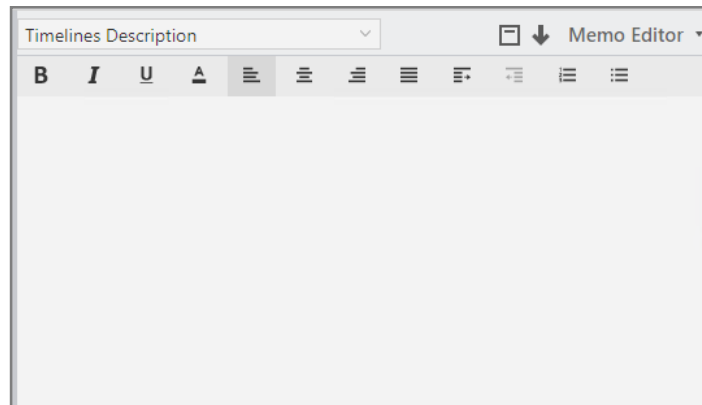
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Also, the following applies to the translated duplicate documents:

- The application codes the **Translation Language** system field with the same target language as the translated document.
- The application codes the **Translation Status** system field with the same value as the translated document.

## Introducing the Memo Editor pane

Nuix Discover now has a new **Memo Editor** pane, as shown in the following figure. This new pane is available for both documents and entities. It contains the existing **Memo Editor** formatting capabilities, as well as a new and quicker way of creating and removing links, and a new feature for downloading memos in Hypertext Markup Language [HTML] format.




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**Note:** The **Memo Editor** pane does not replace the existing editor capability within memo fields. The

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following list provides an overview of the features available in the **Memo Editor** pane:

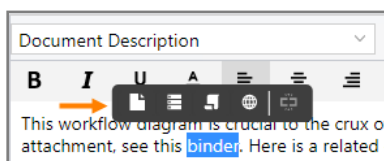
- **Memo field selection:** To switch between the active memo fields, click the drop-down list on the toolbar and select a field. You can select the **Comments**, **Timelines Description**, **[Meta] Chat HTML**, and **Document Description** fields, as well as many others.

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**Note:** From the memo fields drop-down list, the **Memo Editor** pane allows you to access only the one-to-one memo fields.

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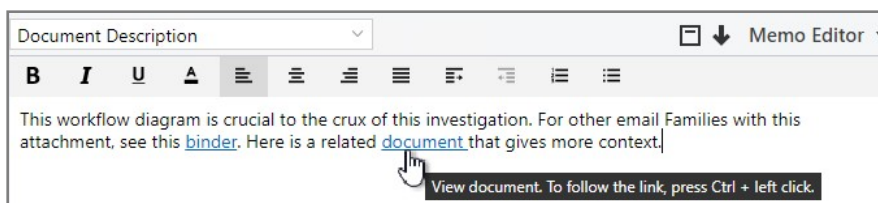
- **Hyperlinks:** Creating hyperlinks to documents, binders, transcripts, or other data takes fewer mouse clicks using the **Memo Editor** pane. Hyperlinking is also available for both documents and entities. In previous releases, you could not hyperlink to entities.
  - When you enter text to create a link and either double-click or highlight the text, an inline menu appears that contains the **Document link**, **Object link**, **Transcript link**, **Web link**, and **Remove link** options, as shown in the following figure.



After selecting a link option, a dialog box appears that allows you to search for and to select the link data.

**Note:** The inline menu for linking replaces the **Link** toolbar button in the existing memo capability.

- To view link contents, each link contains a tooltip that appears when you point to an existing link, as shown in the following figure.

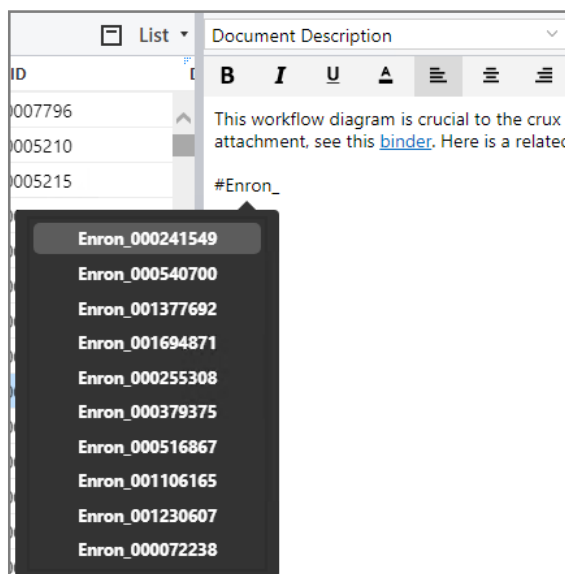


- Linked content opens when you hold down the **Ctrl** key on the keyboard and click the mouse.
- To remove a link, double-click the link and select **Remove link**.

**Note:** You cannot edit the text in existing links. You must first remove the link, then correct spelling errors or other mistakes made in the link text.

- **Auto-search linking:** The **Mentions** feature allows you to do a quick search for document links.

- When you type the **hash [#]** sign, followed by six or more characters of a **Document ID**, an inline list appears with matching search results, as shown in the following figure.



Select an item from this list to automatically create a link to the selected document and insert the link into the memo.

**Tip:** You cannot create a link back to an active document.



- **Downloading:** The **Download** button allows you to export memos to HTML, as shown in the following figure.

<b>Case</b>	Clean_Enron
<b>Document ID</b>	Enron_000007917
<b>Memo field</b>	Document Description
<b>User</b>	Ireichert
<b>Download date</b>	28 Jan 2020
This workflow diagram is crucial to the crux of this investigation. For other email Families with this attachment, see this <a href="#">binder</a> . Here is a related <a href="#">document</a> that gives more context.	

The top portion of the HTML file shows general information such as the case, user, date downloaded, and other information. Memo text follows.

- If the memo contains links, you can view the link contents in the same manner as in the **Memo Editor** pane. However, because transcript links are embedded data and do not have an associated URL, they do not open from the downloaded HTML file. They open only from the **Memo Editor** pane.

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**Note:** If you have not previously logged in to Nuix Discover, the login page appears before opening the linked document.

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## Renumbering: Change the Document IDs and leveling of documents

You can now use the **Renumbering** feature in Nuix Discover to change the Document ID format of documents. Once you have specified a Document ID format, the application does the following:

- Images the selected documents and converts them to a PDF format.
- Applies the specified numbering rules.
- Relevels the documents to match the new Document IDs.
- Applies endorsements to the PDF image.
- Replaces the PDF image with the endorsed version.

You can view the endorsed PDF images in the Image viewer in Nuix Discover.

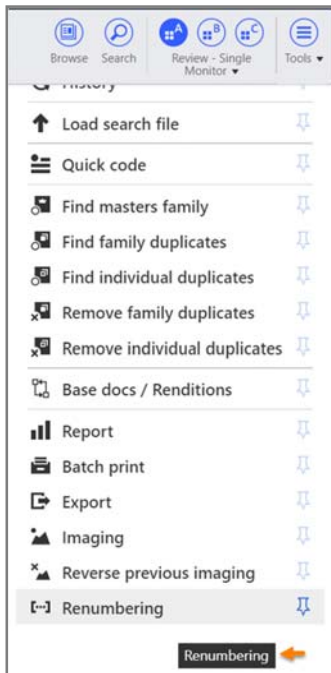
## Renumber documents

You can renumber imported documents using the **Renumbering** option on the **Tools** menu, shown in the following figure.

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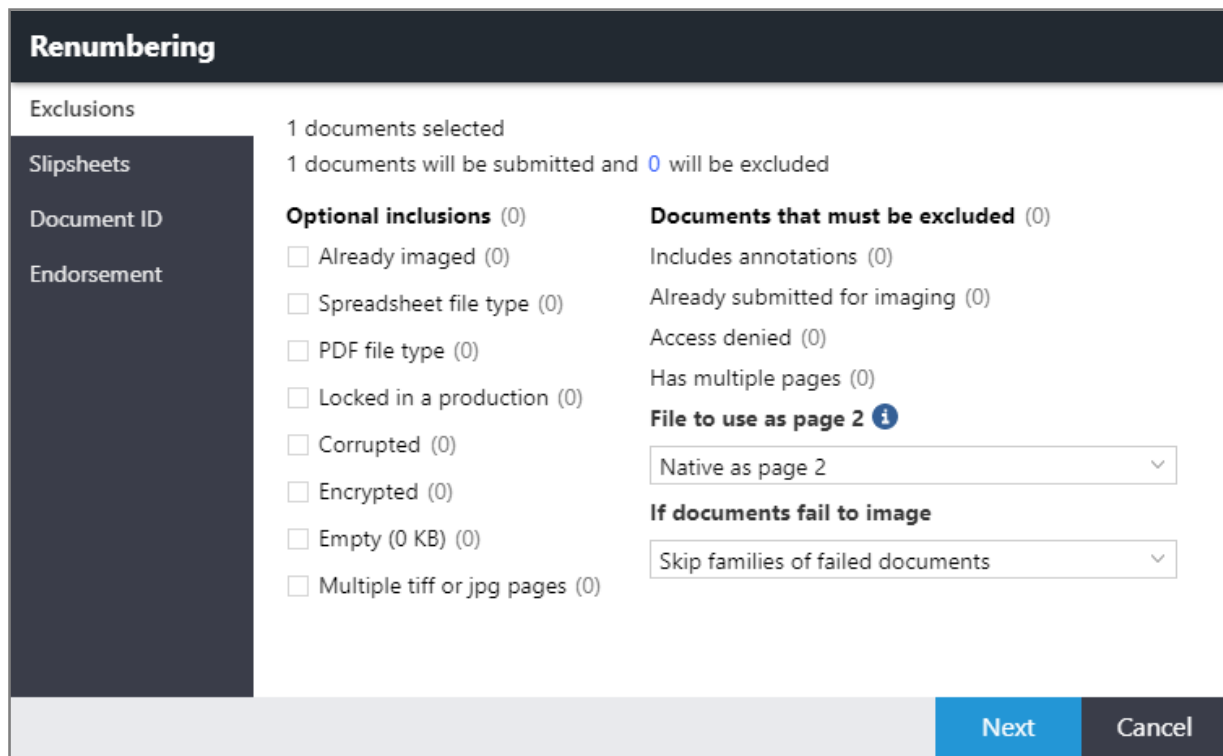
**Caution:** Do not run multiple simultaneous renumbering jobs with the same Document ID prefix in a case. Select one or more documents to enable this tool.

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On the **Exclusions** page, shown in the following figure, you can determine the following information:

- Types of files to include and exclude in your renumbering.
- If the native file should still appear in the Image viewer in NuixDiscover.
- How the application will handle documents that fail to image to PDF.





On the **Slipsheets** page, shown in the following figure, you can select which files to insert slipsheets for, and use the variable builder to determine what text appears on the slipsheets.

The screenshot shows a web interface titled "Renumbering". On the left is a dark sidebar with a menu containing "Exclusions", "Slipsheets", "Document ID", and "Endorsement". The "Slipsheets" option is highlighted. The main content area is white and contains the following elements:

- Include** section with three checkboxes:
  - Spreadsheet file type
  - Encrypted
  - Corrupted
- Placeholder text** section with a text input field containing "Click to define value" and a blue arrow icon on the right.

At the bottom right of the interface are two buttons: "Next" (in a blue box) and "Cancel" (in a dark grey box).

On the **Document ID** page, shown in the following figure, you can determine the following information:

- The format for how the files will be renumbered. You can select a format that includes a prefix, box, folder, page, and delimiter, or you can select a format that includes only a prefix and padding.
  - The following options are available in the **Format** list:
    - Prefix, Box, Folder, Page - increment by page
    - Prefix, Box, Folder, Page - increment by document
    - Prefix with consecutive numbering
- If document families must stay together in a folder after renumbering.
- If levels should be updated to correspond to the new numbering. This option is available only if you select the **Prefix, Box, Folder,** or **Page** format.
- **Override validation:** If you select this option, the application assigns Document ID values starting with the selected value, even if there is an existing Document ID with a higher number.

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**Note:** This option is not selected by default. Selecting this option could result in a job failure if a Document ID already exists. Selecting this option could also cause the application to assign page numbers that already exist on other documents. If you select this option, the application does not validate whether there is a Document ID in the expected range for the settings.

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On the **Endorsement** page, shown in the following figure, you can determine what information goes in the header and footer of renamed documents.

If you select the **Document ID plus page number** endorsement option, as shown in the following figure, the **Start numbering on page 2** check box appears. If you select this check box, the first page of a document includes only the Document ID, but not the page number. The page numbering starts on the second page of the document.

## What's new for case administrators

The following new or updated features are available to case administrators in this release.

### Security > Groups: Set the default start page for a group

You can now set a default start page for a group. One of the benefits of this new feature is that you can, for example, route users directly to the **Documents** page so that they can start reviewing documents.

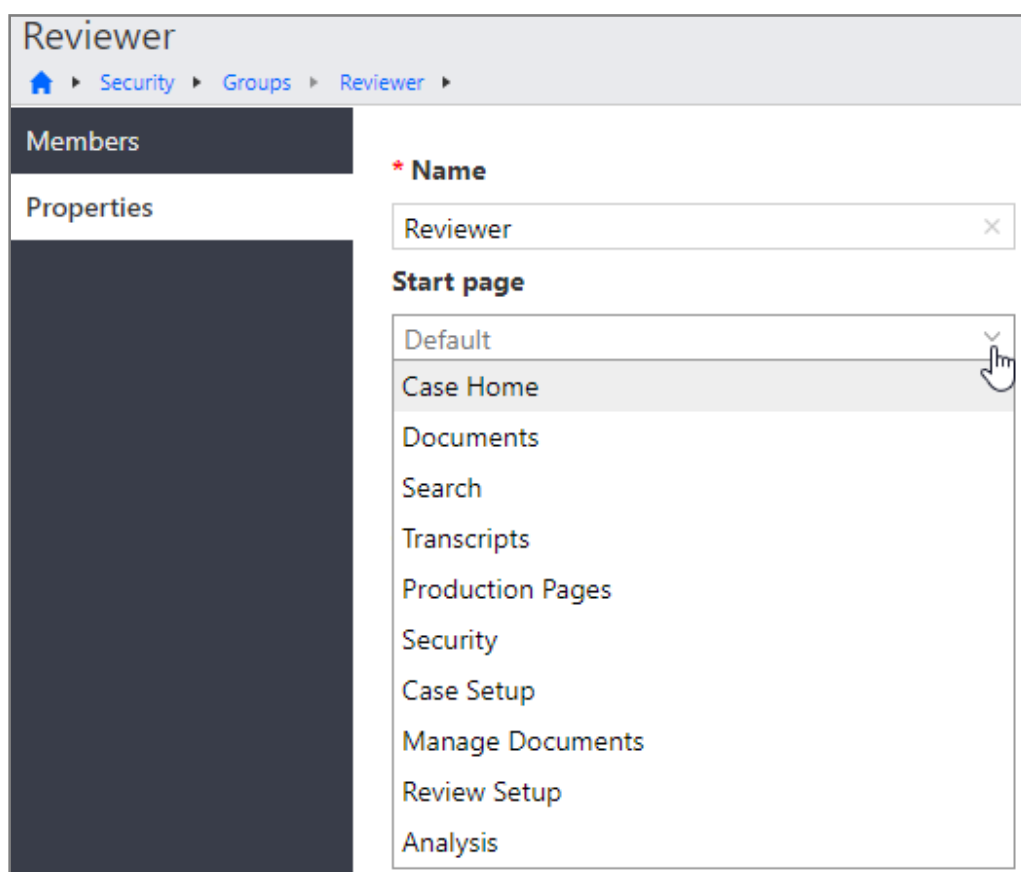
**Workspace A** appears by default on the **Documents** page.

Use the following procedure to set the start page for an existing group.

1. On the **Security > Groups** page, in the **Name** column, click the link for a group.
2. On the **Properties** page, in the **Start page** list, shown in the following figure, select one of the following start pages: **Documents**, **Search**, **Transcripts**, **Production Pages**, **Security**, **Case Setup**, **Manage Document**, **Review Setup**, **Analysis**.

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**Note:** The **Case Home** page is the default start page.

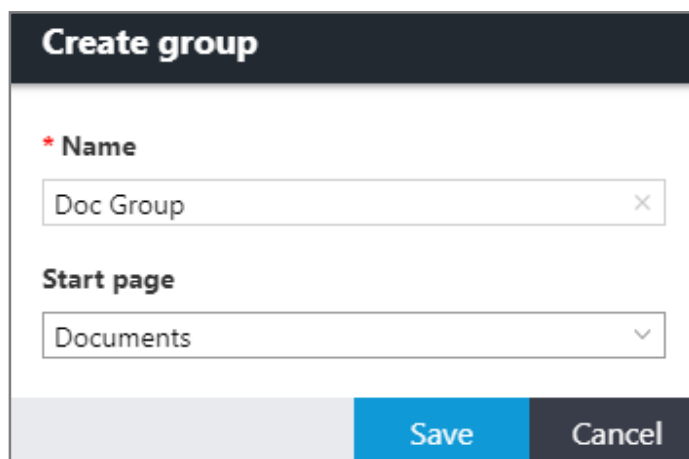


3. Click **Save**.

The next time a member of the group logs in to the application, the designated start page appears. For example, if you set the **Documents** page as the start page, the **Documents** page appears by default.

Use the following procedure to change the start page for an existing group.

1. On the **Security > Groups** page, on the toolbar, click **Add**.
2. In the **Create group** dialog box, shown in the following figure, do the following:
  - o In the **Name** box, provide a name.
  - o In the **Start page** list, select a page.



3. Click **Save**.

## Security > Features: Memo Editor pane configuration

To make the **Memo Editor** pane available to users, on the **Case Home > Security > Features** page, an administrator must set the **Document – Memo editor** feature to **Allow** for a group. By default, this feature is set to **Deny**.

## Security > Features: Renumbering: Enable the renumbering feature

On the **Security > Features** page, administrators can enable the renumbering feature using the **Processing – Renumbering** option.

## Case Setup > System Fields > Renumbering: Enable renumbering system fields

On the **Case Setup > System Fields** page, administrators can make renumbering-related system fields available to users. If the renumbering system fields are enabled, users can search for the fields and display the fields as columns in the **List** pane.

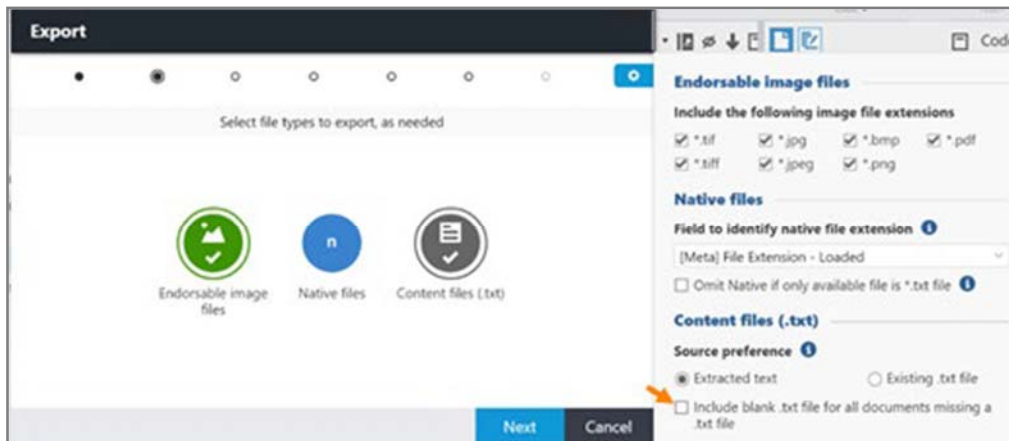
The following renumbering system fields are available:

- Renumbering Status
- Renumbering Previous Document ID
- Renumbering ID

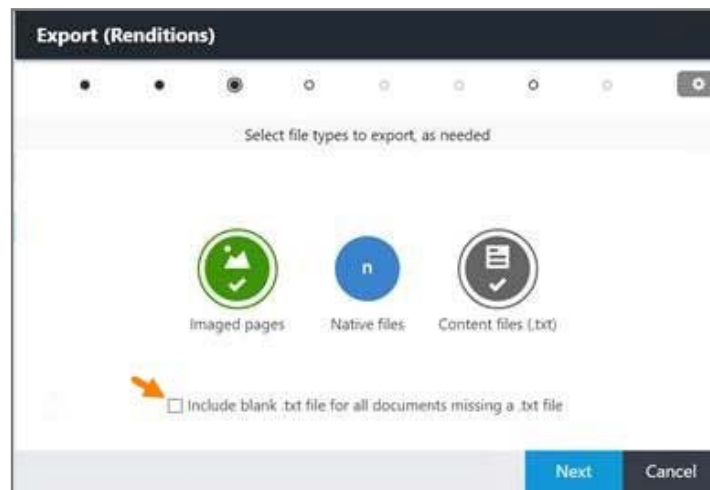
## Manage Documents > Exports: Option to include blank text files

For custom export types [base or renditions], a new option is available in the **Export** window to include a blank .txt file for all documents in the export that are missing a .txt file, as shown in the following figure. For base documents, the option is available on the **File types** page in the **Settings** window [available when you click the **Settings** button, or gear].

Option for base document export



For rendition documents, the option is available on the **File types** page, as shown in the following figure. Option for document export



If you select this option, along with the option to export content files, the application exports a blank .txt file for documents without an existing .txt file or associated extracted text. For base documents, the application names the .txt file according to the document ID. For rendition documents, the application names the .txt file according to the production document label for renditions. The blank .txt files are referenced in any load files that have a field for the text file name.

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**Note:** When exporting base documents, if the application excludes any .txt files from an export because of annotations, a blank .txt file is not exported for those documents. The option to omit text files if a document is annotated is on the **Annotations** page in the **Settings** window [available when you click the Settings button, or gear].

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To help administrators easily identify documents for which blank .txt files were exported, the following message appears on the **Warnings** page of the export job: "A blank content file [.txt] was exported because no content/.txt file was found for a document."

### Manage Documents > Imaging: Add time zone setting for email file conversion

Administrators can now select a time zone for rendering native email files into images. The **Time zone** option is available in the **Manage Documents > Imaging-Automated > Settings** window on the **Email and Website** page. Administrators can select **Use ingestions default** or a specific time zone. If the administrator selects **Use ingestions default**, the application uses the time zone set in the default settings for Ingestions.

### Manage Documents > Imports: Prevent the creation of a new field with the same name as a system field

In the **Import settings** window, on the **Field Map** page, if a user creates a new field with the same name as an existing system field but of a different type, the application does not allow the user to continue. The field is outlined in red, and the following message appears: "New field cannot match an existing system field's name."

### Manage Documents > Ingestions: Upgrade to the Nuix Engine 8.4.5

Ingestions now uses the Nuix Workstation 8.4.5 processing engine. The engine upgrade resolves the out-of-memory failures when processing some forensic images.

### Manage Documents > Renumbering: View renumbering job properties

On the **Manage Documents > Renumbering** page, administrators can view the properties and progress of renumbering jobs. Click a renumbering job in the list to view the properties or errors for the job.

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**Note:** Administrators can allow Group Members and Group Leaders to access the **Manage Documents > Renumbering** page. On the **Security > Administration** page, in the **Leaders** or **Members** columns, set the **Manage Documents – Renumbering Management** function to **Allow**, and then click **Save**.

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## What's new for portal administrators

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

### Portal Management > Processing > Index Status: Only document entities are included in the index status counts

On the **Portal Management > Processing > Index Status** page, shown in the following figure, only document entity items are included in the indexing counts in the **Documents** columns [**Total**, **Indexed**, **Waiting**, **Excluded**, **Failed**]. Non-document entity items are not captured.

		Documents						
Index Status		Cases	Organization	Total	Indexed	Waiting	Excluded	Failed
Jobs	<input type="checkbox"/>	Clean_Enron	Discover	2,015,608	1,885,468	0	27,840	102,300

### Portal Management > Reports: New Max data [GB] column in Hosted Details report

The **Hosted Details** report includes a new column named **Max data [GB]**, shown in the following figure. This column displays the maximum active hosted data size for a case within a specified date range and captures the following data: sum value of base documents, production renditions, databases, the Elasticsearch index, the content index, and Predict data. This column also includes a calendar icon.

		Data currently displayed is based on local time.	
Usage		<input checked="" type="radio"/> Total as of	<input type="radio"/> Net difference between
		5/18/2020	5/1/2020
Hosted Details	Users	Case	Max data (GB)
	<input checked="" type="checkbox"/>	All Cases (2)	13.28
	<input type="checkbox"/>	ND Admin Demo	6.70
	<input type="checkbox"/>	ND Sandbox	6.58

Hover over the calendar icon to display the date of the maximum value.

If you download a report, it will now include the following two columns and values:

- **Max data [GB]:** The maximum active hosted data size for a case.
- **Max data [date]:** The date the maximum active hosted data size was captured.

## Portal Management > Settings: Text extraction: Update batching logic in text extraction job

In previous versions, the application processed text extraction jobs in batches using the number of files per batch that was specified in the **Extract text job batch size** case setting. [To access this setting, go the **Portal Management > Cases and Servers > Cases** page and click on the name of a case.]

To efficiently accommodate larger files, portal administrators can now set batch thresholds by file size using the **Extract text job max batch file size** portal setting, shown in the following figure.

To access this setting, go to the **Portal Management > Settings > Portal Options** page. The application determines the text extraction job batch size using whichever is smaller in file size: the number of files specified in the case setting or the maximum file size per batch specified in the portal setting.



## Portal Management > Settings > Log Options: Multiple S3 bucket entries supported for the Telemetry archive configuration

The **Telemetry archive configuration** field on the **Portal Management > Settings > Log Options** page now has a new "S3Buckets" setting that supports multiple entries for the key, secret, region, and bucket values.

When telemetry is configured to store the logs in the database, and the configuration string includes multiple S3 buckets, the telemetry data is pushed to all S3 buckets.

The following example shows how to format the JSON configuration string with multiple S3 buckets.

```
{
  "Checkpoint": 0,
  "CheckpointRPF": 0,
  "S3Buckets": [
    { "Key": "*****", "Secret": "*****", "Region": "us-east-1", "Bucket": "s3-bucket-1" },
    { "Key": "*****", "Secret": "*****", "Region": "us-east-1", "Bucket": "s3-bucket-2" }
  ],
  "CleanupMaxDays": 3,
  "ScheduleId": 22,
  "IntervalInMinutes": 30,
  "NRecentRecordsToReturn": 10000
}
```

## What's new for system administrators

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

### Portal Management > Cases and Servers: Delete case record from the portal database for deleted cases

After a case is deleted, as a system administrator, you can delete the case record for the deleted case from the portal database. You can also then create a new case using the same case name.

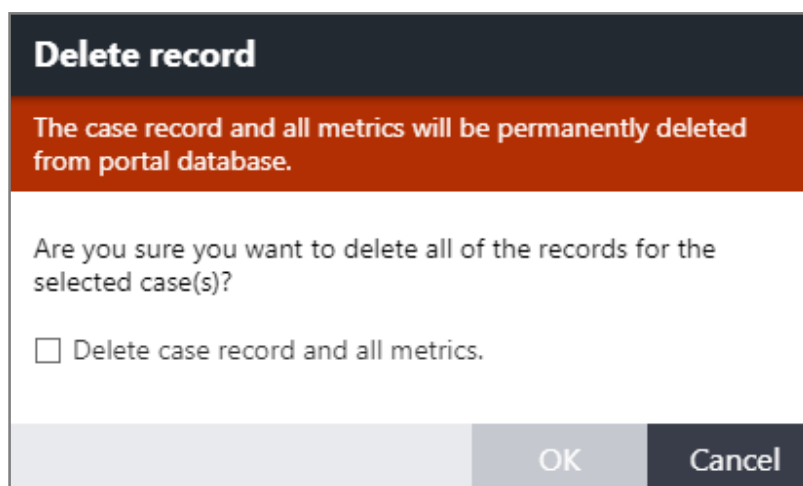
Use the following procedure to delete the case record for a deleted case.

1. On the **Portal Management > Cases and Servers > Deleted Cases** page, select the check box next to a case.
2. On the toolbar, click **Delete record**.
3. In the **Delete record** dialog box, shown in the following figure, select the **Delete case record and all metrics** check box.

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**Note:** Once you select this check box and click **OK** in the following step, the case record and all metrics are permanently deleted from the portal database.

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4. Click **OK**.

After you delete the record, the deleted case no longer appears on the **Deleted Cases** page or the **Portal Management > Reports** page.



## Portal Management > Organizations: Default template case for cloning

System administrators can now select a default case to clone at the organization level.

The following new setting is now available on the Properties page for an organization, as shown in the following figure: **Default template case for cloning**

### AutomationOrganization

[Home](#) > [Organizations](#) > [AutomationOrganization](#) >

**Properties**

Cases

Users

File Repositories

Servers

Content: File Type Rank

Indexing: Options

Indexing: Noise Words

Indexing: Alpha Standard

Indexing: Alpha Extend...

**\* Name**

Enable organization as a provider i

**Client of provider**

**Default IP address rule** i

**Default identity provider** i

**Default case template for cloning** i ←

## Portal Management > Organizations: Schedule daily case metrics jobs

System administrators can now schedule daily case metrics jobs for organizations and all cases in those organizations.

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**Note:** This feature is not available to portal administrators.

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Use the following procedure to schedule a daily case metrics job for an organization.

1. On the **Portal Management > Organizations** page, on the toolbar, click the **Case metrics** button. The **Case metrics settings** dialog box appears.

2. In the **Case metrics settings** dialog box, shown in the following figure, in the **Time** list, select a time.

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**Note:** The time appears in the user's local time.

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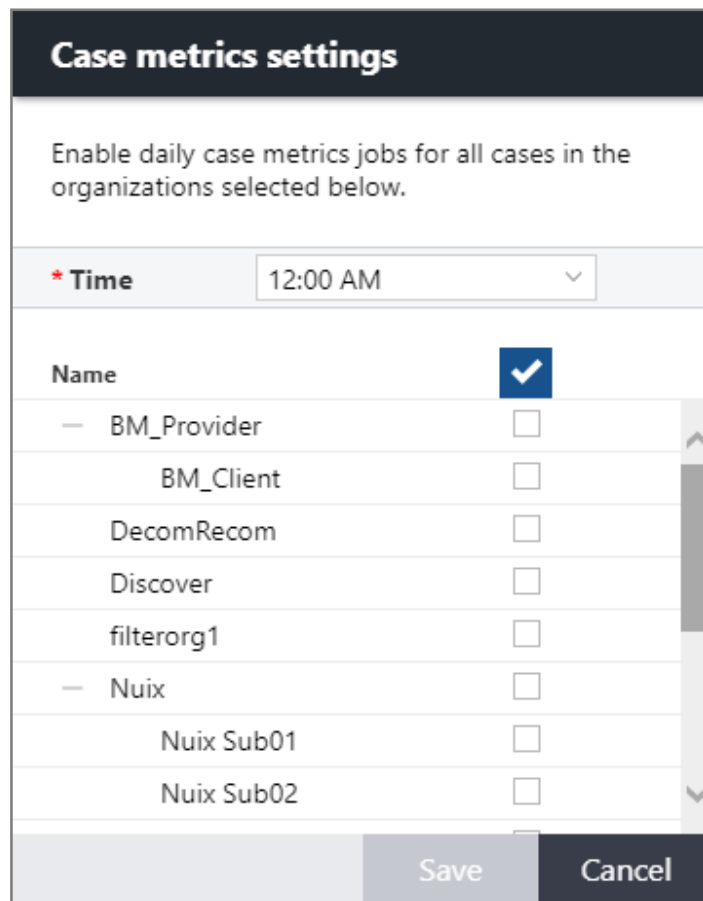
3. Select one or more organizations.

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**Note:** To select all organizations, select the blue checkmark, shown in the following figure.

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4. Click **Save**.



Case metrics settings	
Enable daily case metrics jobs for all cases in the organizations selected below.	
* Time	12:00 AM
Name	<input checked="" type="checkbox"/>
— BM_Provider	<input type="checkbox"/>
BM_Client	<input type="checkbox"/>
DecomRecom	<input type="checkbox"/>
Discover	<input type="checkbox"/>
filterorg1	<input type="checkbox"/>
— Nuix	<input type="checkbox"/>
Nuix Sub01	<input type="checkbox"/>
Nuix Sub02	<input type="checkbox"/>
Save Cancel	

The jobs are scheduled to run daily, at the time you selected. The newly scheduled jobs are added to all existing cases for the selected organization or organizations. For cases that are added to an organization after the job has been scheduled, the settings for the organization apply.

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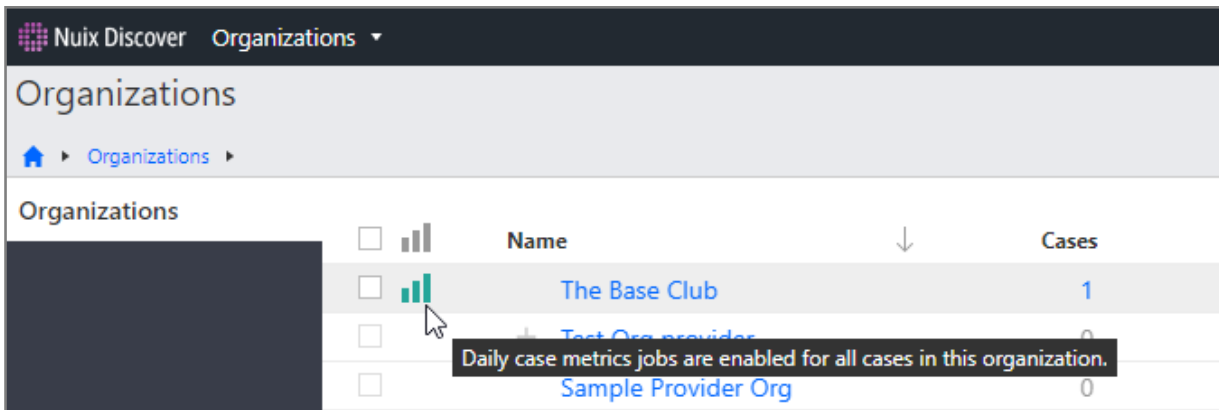
**Note:** These settings do not override previously scheduled jobs.

Use the following procedure to cancel a daily case metrics job.

1. Open the **Case metrics settings** dialog box.
2. Clear the check box for the selected organization or organizations.
3. Click **Save**.

After you schedule a daily case metrics job, in the table on the **Portal Management > Organizations** page, an icon in the second column indicates if a daily case metrics job is scheduled for an organization, as shown in the following figure.

**Note:** This column is visible only to system administrators.



Once the daily case metrics job is complete, the values in the following columns are updated on the **Portal Management > Reports > Hosted Details** page:

- Base documents [GB]
- Production renditions [GB]
- Databases [GB]
- Elasticsearch index [GB]
- Content index [GB]
- Predict [GB]

The values in the following columns are not updated as part of a daily case metrics job. Rather, the values in these columns reflect the values from the last **Gather case metrics** job that was run:

- Orphan [GB]
- File transfer data [GB]
- Archive data [GB]
- Missing [GB]

To update the values for these columns, you must run a full **Gather case metrics** job on the **Portal Management > Processing > Jobs** page.



## What's new for developers

The following new features are available to developers.

### Connect API Explorer: `maxActiveHostedSize` and `dateOfMaxActiveHostedSize` case statistics

There are two new case statistics available through the Connect API Explorer that will return the maximum value of the `aggregateActiveHostedSize` and the date of that value within a specified date range.

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**Note:** The `aggregateActiveHostedSize` statistic is the sum of `sizeOfBaseDocumentsHostedDetails`, `sizeOfRenditionsHostedDetails`, `aggregateDatabases`, `sizeOfElasticSearchIndex`, `dtIndexSize`, and `sizeOfFolderData_Predict`.

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- `maxActiveHostedSize`: Returns the maximum value of `aggregateActiveHostedSize` within a specified date range. This value calculates from the first minute of the `startDate` [12:00:00am] to the last minute of the `endDate` [11:59:59pm] in Coordinated Universal Time [UTC].
  - When only providing the `endDate` for the date range, the returned value is the highest value of the `aggregateActiveHostedSize` calculating from the beginning of the case to the last minute of the specified `endDate`.
  - When there is no `startDate` or `endDate` provided, the returned value is the highest of the `aggregateActiveHostedSize` over the entire life of the case, from the beginning of the case through the current day.
- `dateOfMaxActiveHostedSize`: Returns the date of the `maxActiveHostedSize` within a specified date range.
  - When only providing the `endDate` for the date range, the returned value is the date of the `maxActiveHostedSize` calculating from the beginning of the case to the last minute of the specified `endDate`.
  - When there is no `startDate` or `endDate` provided, the returned value is the date of the `maxActiveHostedSize` over the entire life of the case, from the beginning of the case through the current day.

Sample query:

```
query {
  cases {
    name
    statistics(startDate: "2020-04-01", endDate: "2020-04-30") {
      maxActiveHostedSize
      dateOfMaxActiveHostedSize
    }
  }
}
```



## Import API: Delete files from the S3 bucket upon completion of an import job

If the import job setting is to copy files from S3, once the files are copied, the application deletes the files from the S3 bucket. The application deletes the files for only those import jobs that completed successfully. The application does not delete files in failed import jobs.



## Installation and deployment notes

Note the following installation and deployment notes.

### Nuix Discover support lifecycle for Microsoft Windows Server and Microsoft SQL Server

The Nuix Discover support lifecycle for Microsoft products is communicated at the beginning of each year.

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**Note:** For additional information about the Microsoft Lifecycle Policy, go to

<https://support.microsoft.com/en-us/lifecycle/search>.

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The general support policy for Microsoft Windows Server and Microsoft SQL Server for Nuix Discover quarterly on-premises releases is as follows:

- Nuix Discover will support at least two versions of Microsoft Windows Server and Microsoft SQL Server for each release.
- Within one year of a newly released version of Microsoft Windows Server or Microsoft SQL Server, those versions will be supported by Nuix Discover.
- Once Microsoft ends mainstream support for a version of Microsoft Windows Server or Microsoft SQL Server, those versions will no longer be supported by Nuix Discover.
- A 12-month notice of support retirement will be communicated with each quarterly on-premises release.

As of the Nuix Discover 10.3 quarterly release to on-premises clients, the following Microsoft server products are supported:

- Microsoft Windows Server Operating System
  - Microsoft Windows Server 2012 R2
    - **End-of-support notice:** Microsoft Windows Server 2012 R2 will no longer be supported as of the 10.6.000 release in December of 2020.
  - Microsoft Windows Server 2016
  - Microsoft Windows Server 2019
- Microsoft SQL Server
  - Microsoft SQL Server 2016 Standard SP2
  - Microsoft SQL Server 2017 Standard CU5 and higher
  - Microsoft SQL Server 2019 CU5

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**Note:** For detailed information about client computer requirements, see the *Nuix Discover 10.3 Client Computer Requirements* guide. For detailed system and hardware requirements, see the *Nuix Discover 10.3 Hardware and System Requirements* guide.

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### Upgrade to Nuix Engine 8.4.5

Ingestions now uses the Nuix 8.4.5 engine. The engine upgrade resolves the out-of-memory failures when processing some forensic images.



## Login Service version 2.3.15 now includes an installer

- This installer is intended for deployment on Microsoft Windows Servers.
- New versions of Nux Discover will continue to be compatible with Login Service version 2.2.21.
- The Login Service can be installed using the Nux Discover Deployer version 2.5.94 and higher.
- The Login Service is an optional feature.