RELEASE NOTES

Nuix Discover 10.4 Quarterly Release Notes (OP)

Nuix Discover

Nuix Discover 10.4 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 10.3.011 - 10.4.010.

What's new for end users

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

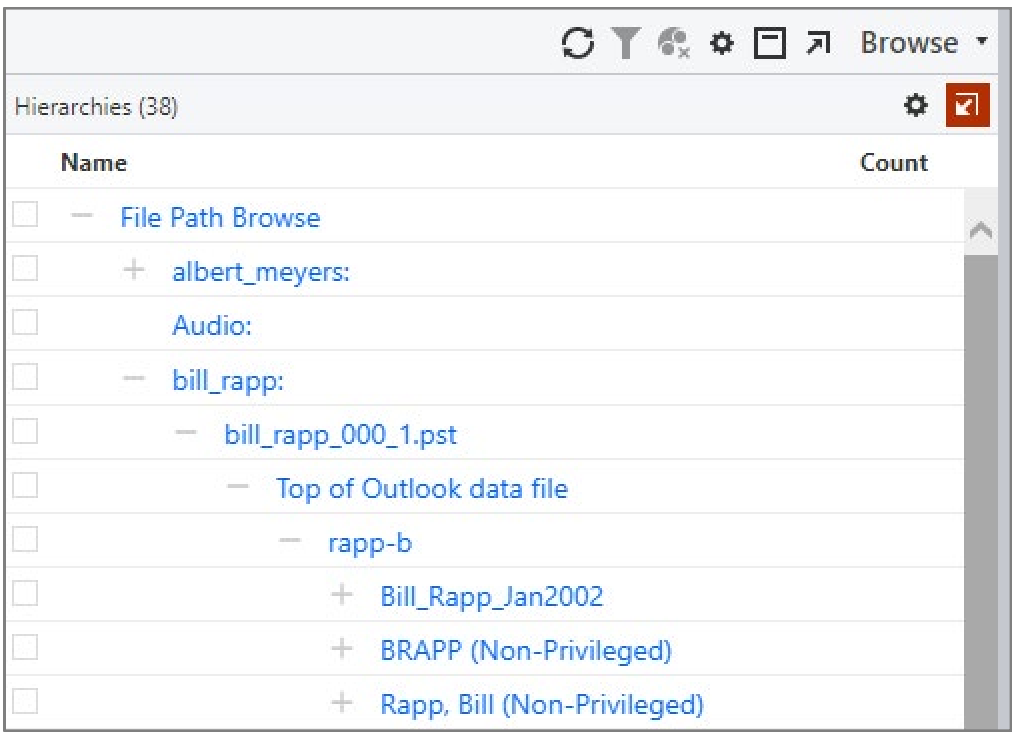
Note: Your administrator must grant access to some of these features.

Browse: Introducing the Hierarchies feature

This release includes a new feature that allows you to view **Hierarchies** in the **Browse** pane, for example, to view the folder hierarchy of a file path for a custodian.

An example is shown in the following figure.

Note: Your administrator must configure and grant you access to hierarchies.



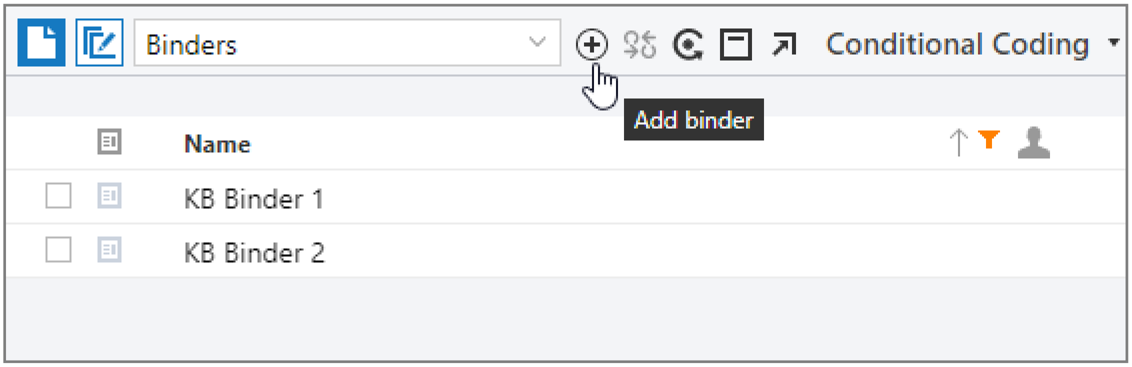
Tip: You can also search for a **Hierarchy** on the **Search** page.

Conditional Coding: Add a binder

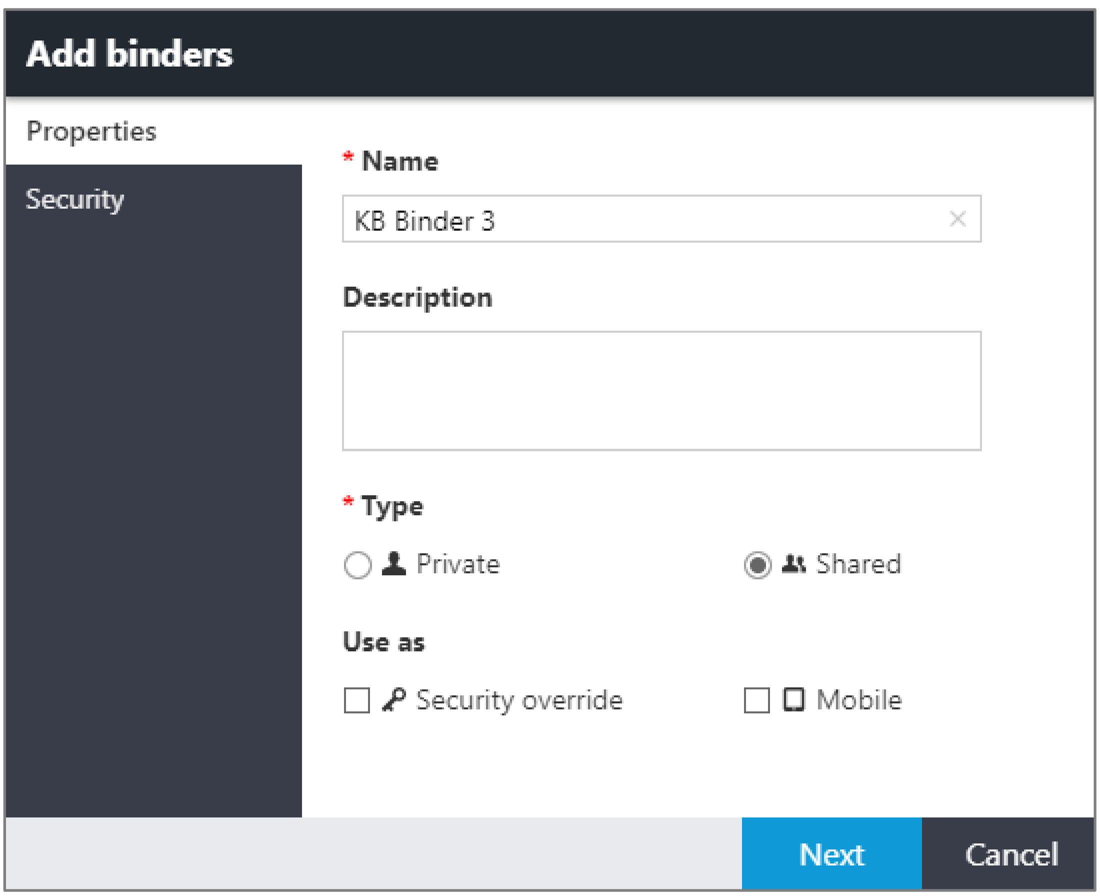
In the **Conditional Coding** pane, group leaders with permissions to work with binders can now add a binder and apply security to that binder.

Use the following procedure to add a shared binder.

1. In the **Conditional Coding** pane, in the list on the toolbar, select the **Binders** template.
2. On the toolbar, click the **Add binder** button, as shown in the following figure.



3. In the **Add binders** window, shown in the following figure, on the **Properties** page, provide a name and an optional description.



4. Under **Type**, leave the **Shared** binder type option selected.
5. Optionally, under **Use as**, set the binder to be used as a **Security override** or **Mobile** binder.
6. Click **Next**.

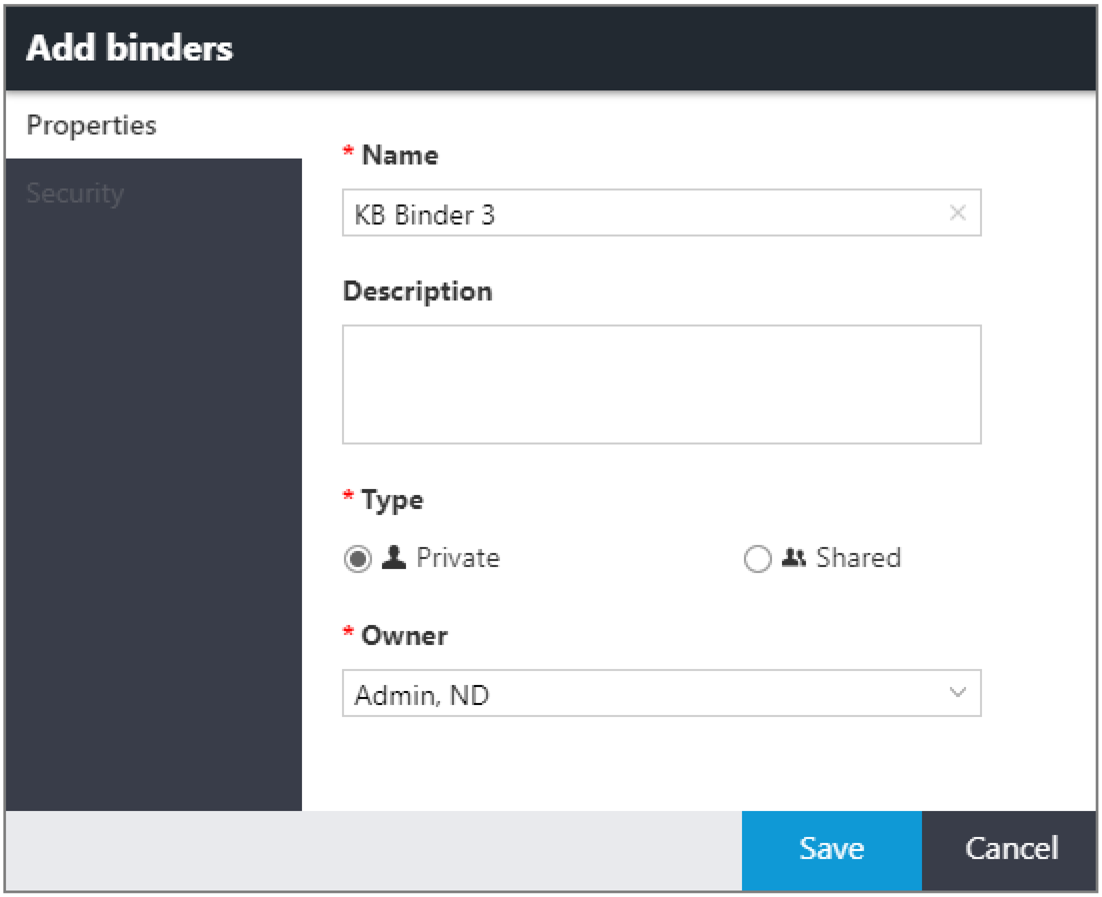
7. On the **Security** page, set the user group security for the shared binder.
8. Click **Save**.

   The binder appears in the **Conditional Coding** pane.

Use the following procedure to add a private binder.

1. In the **Conditional Coding** pane, in the list on the toolbar, select **Binders**.
2. On the toolbar, click the **Add binder** button.
3. In the **Add binder** dialog box, on the **Properties** page, provide a name and an optional description.
4. Under **Type**, select **Private**.

   The **Owner** list appears, as shown in the following figure.



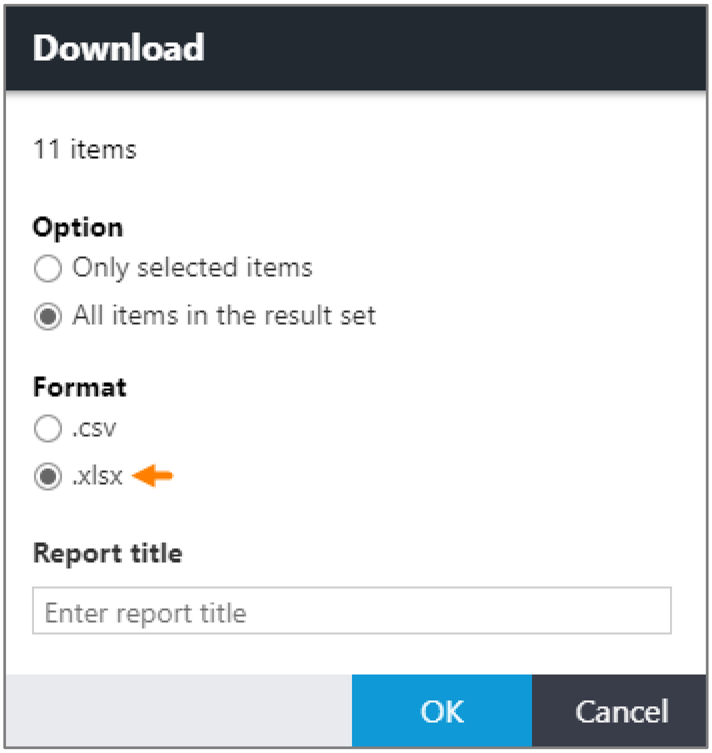
5. In the **Owner** list, select an owner.
6. Click **Save**.

   The binder appears as a private binder in the **Conditional Coding** pane.

Note: If you are a group leader with permissions and need to delete a binder, you can do that on the **Case Setup > Binders** page, but not in the **Conditional Coding** pane.

List: Download a report to an .xlsx format and add a report title

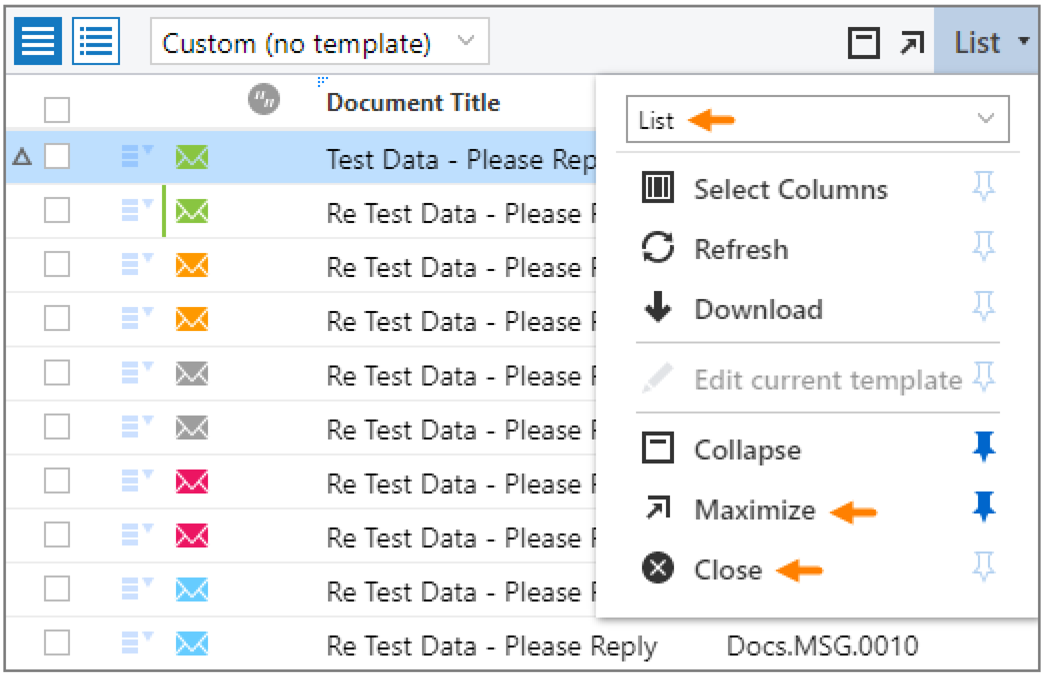
In the **List** pane, you can now download a report to an .xslx format and give the report a title, as shown in the following figure. Previously, you could download the report only to a .csv format.



Enhancements to Workspace panes

This release includes the following enhancements to all workspace panes, as shown in the following figure:

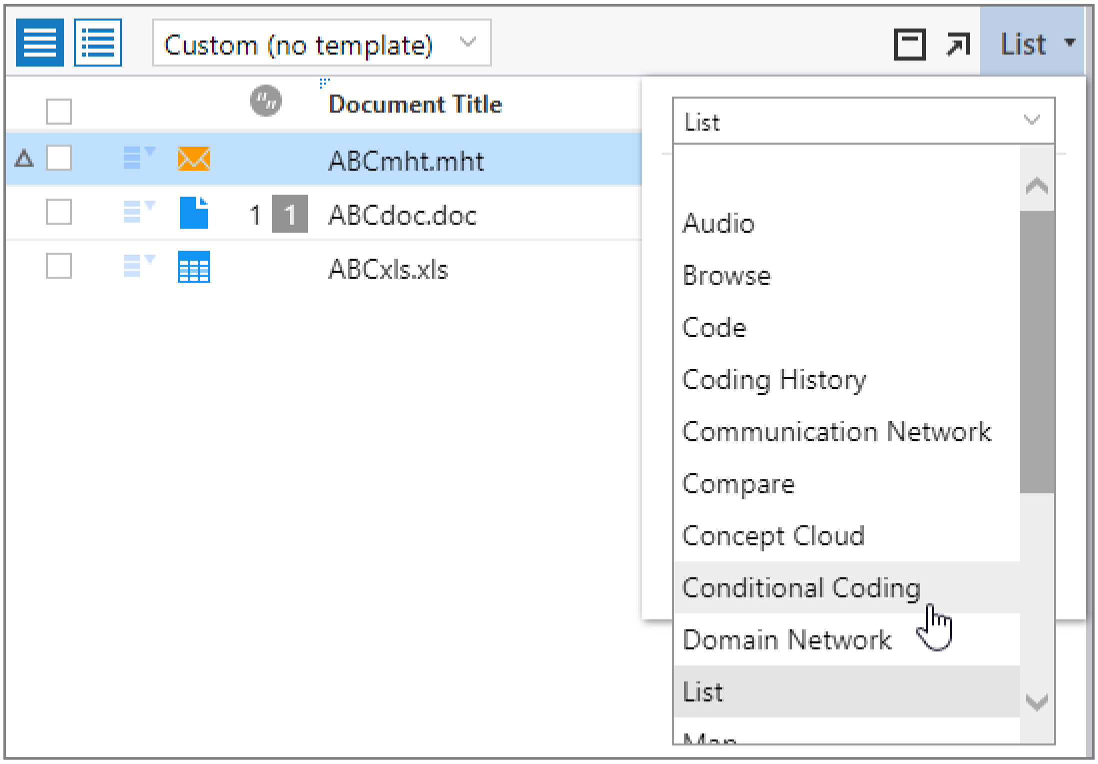
- Change a pane
- Maximize a pane
- Close a pane



Change a pane

To change a pane, on the pane menu, select a different pane from the list, as shown in the following figure.

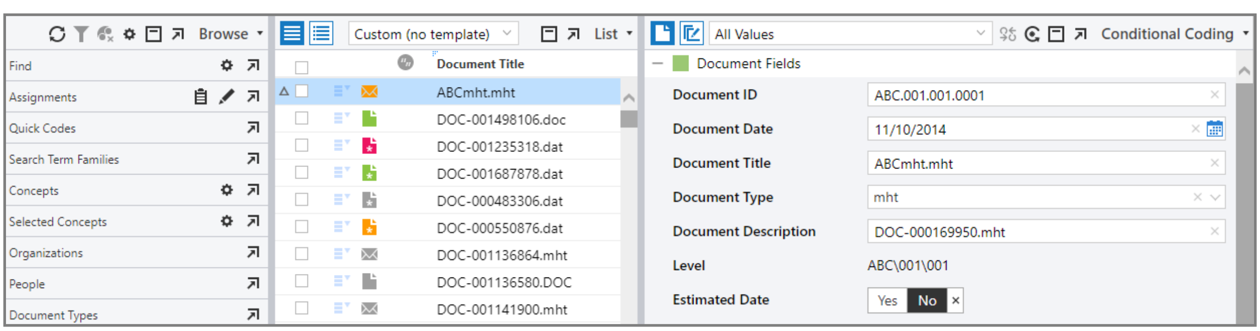
Note: Changing a pane changes your current workspace configuration.



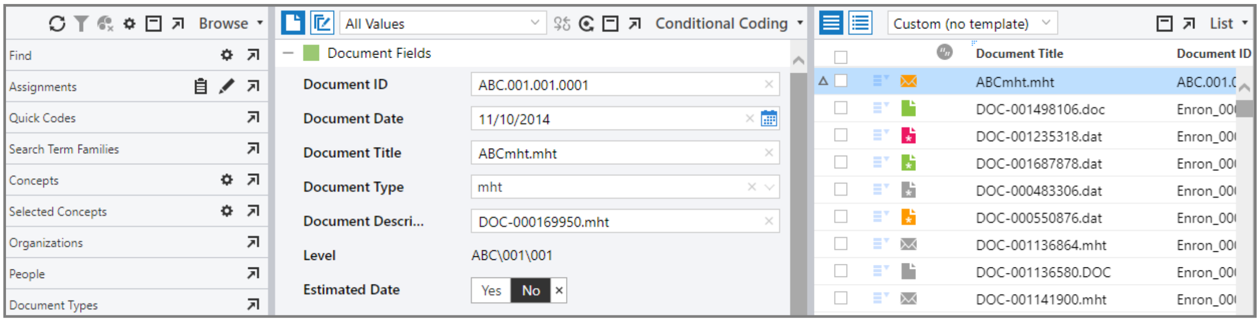
If you select a pane that is already included in your current workspace configuration, the current pane is exchanged with the pane you selected.

For example, if your workspace configuration includes a **Browse** pane, a **List** pane, and a **Conditional Coding** pane, if you change the **List** pane to a **Conditional Coding** pane, the **List** pane appears where the **Conditional Coding** pane used to be, as shown in the following figures.

Before

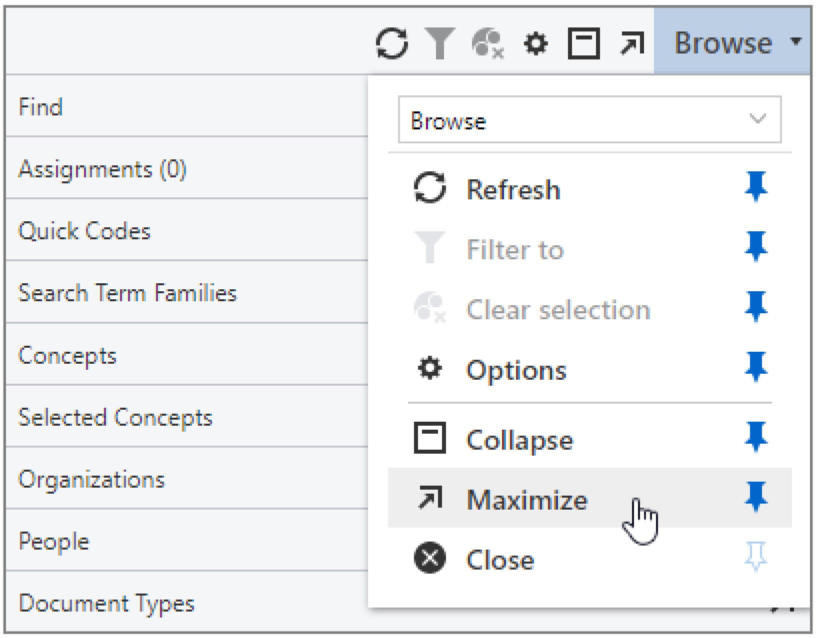


After



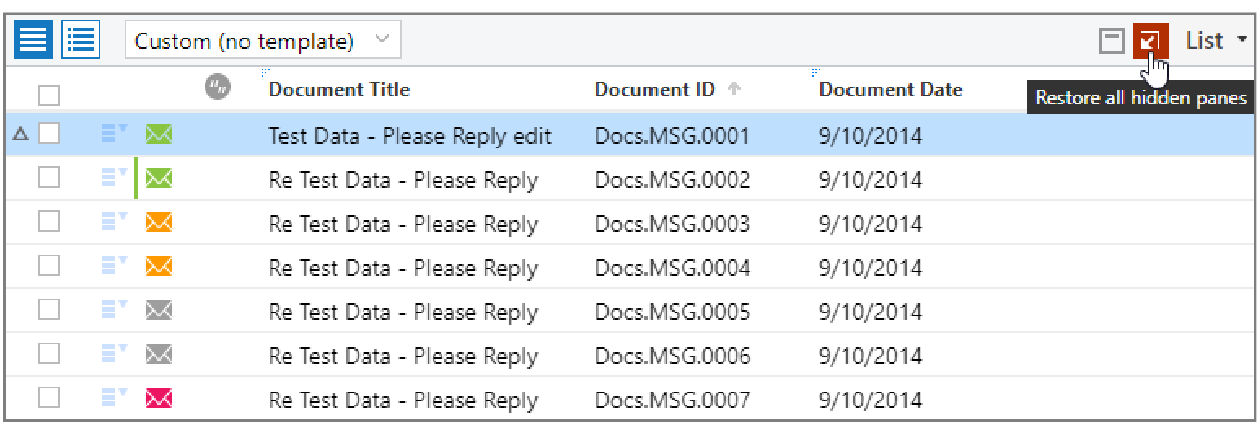
Maximize a pane

All workspace panes now include a new option to maximize the pane, as shown in the following figure.



When you select the **Maximize** option, the application maximizes the pane and hides all of the other panes in the workspace configuration.

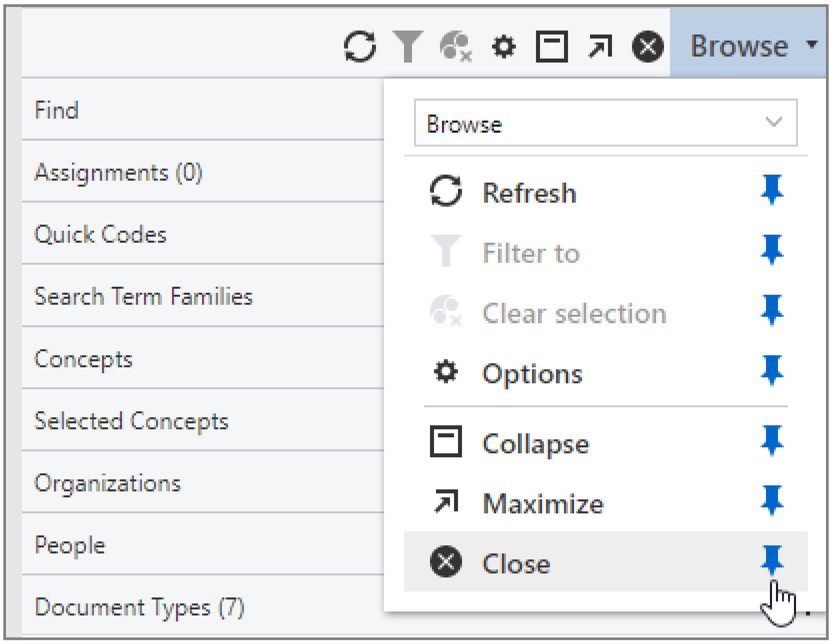
To restore the hidden panes, click the **Restore all hidden panes** button on the toolbar of the pane, as shown in the following figure.



Close a pane

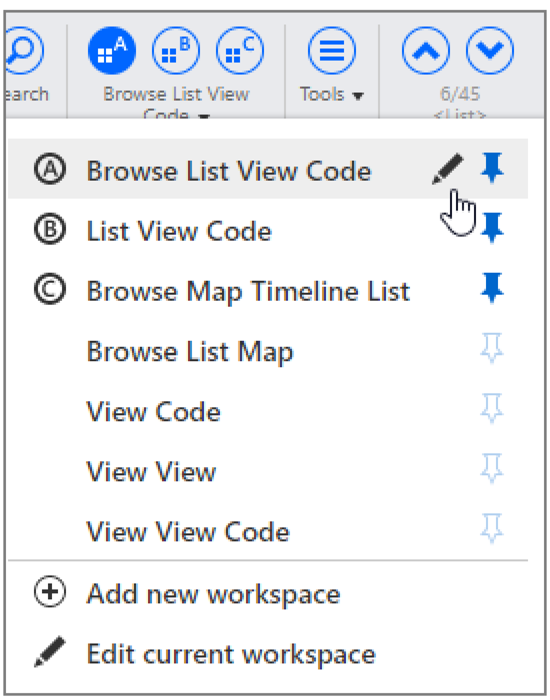
All workspace panes now include a new option to close the pane, as shown in the following figure.

Note: Closing a pane changes your current workspace configuration.



When you select the **Close** option, the application removes the pane from the current workspace as well as from the pre-set workspace configurations.

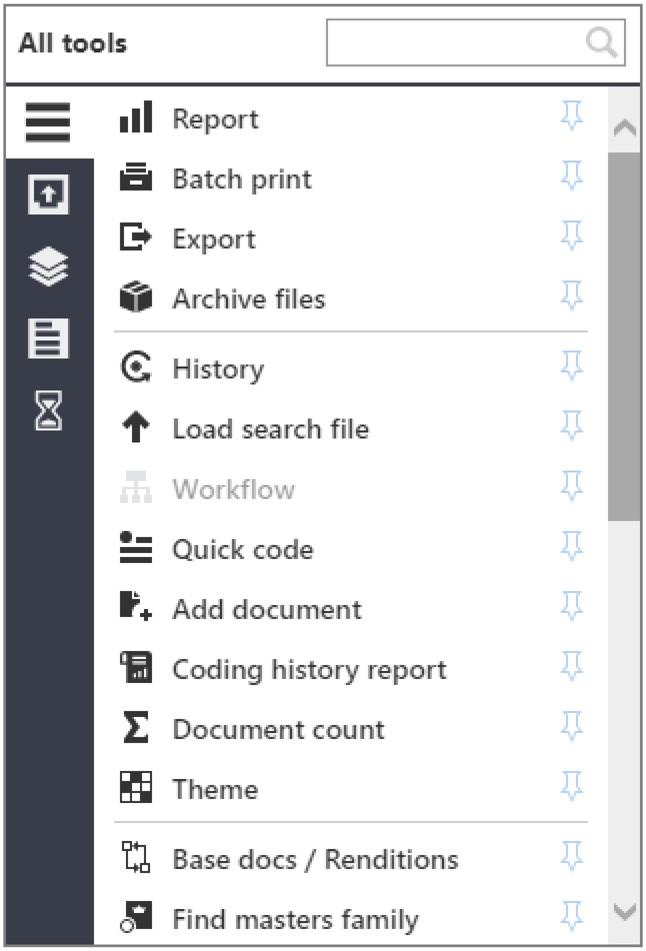
To add the pane that you closed back to a workspace, on the workspaces menu, shown in the following figure, edit the workspace.



Tools: Introducing the redesigned Tools menu

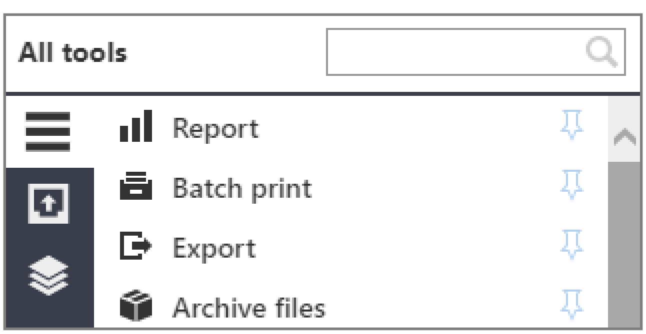
This release includes a redesigned **Tools** menu that provides an enhanced user experience when working with various tools. The menu was redesigned based on user feedback. The tools are organized into logical groupings. The names of the tools have not changed.

All tools: Allows you to access the entire list of tools, as shown in the following figure. The tools in each section mirror the logical groupings.



Frequently used tools

Frequently used tools such as **Report** and **Batch Print** are now at the top of the menu, as shown in the following figure.



Find tools quickly

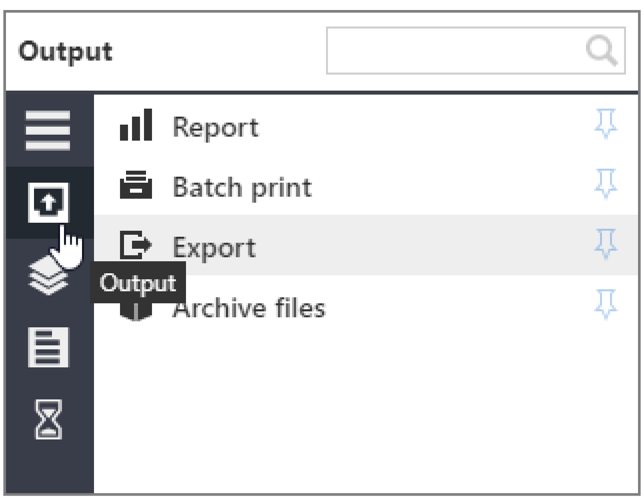
The search box at the top of the menu, shown in the following figure, allows you to find tools without having to scroll through the list.

Logical groupings

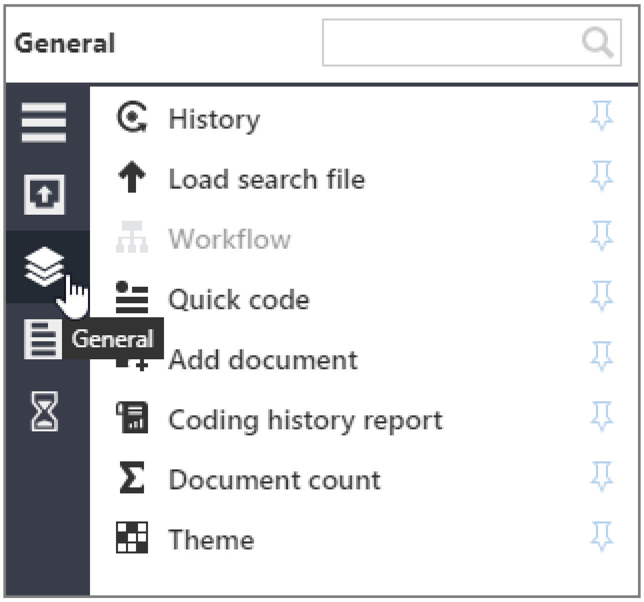
The tools are organized into the following logical groups that you can access by clicking the buttons in the navigation pane on the menu:

- Output
- General
- Results
- Processing

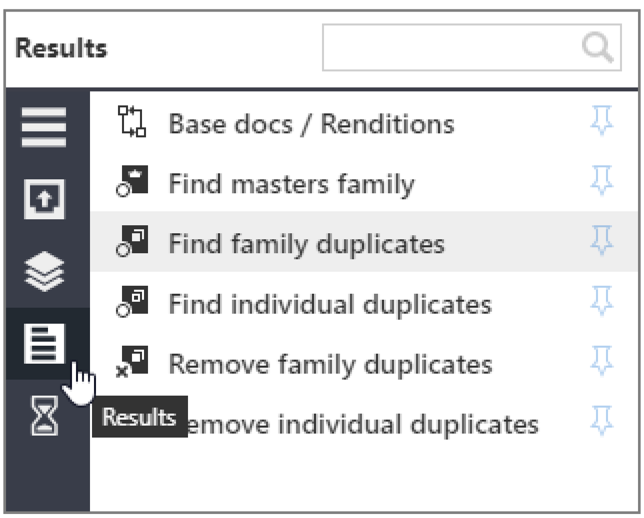
Output: The tools in this grouping include **Report**, **Batch print**, **Export**, and **Archive files**, as shown in the following figure.



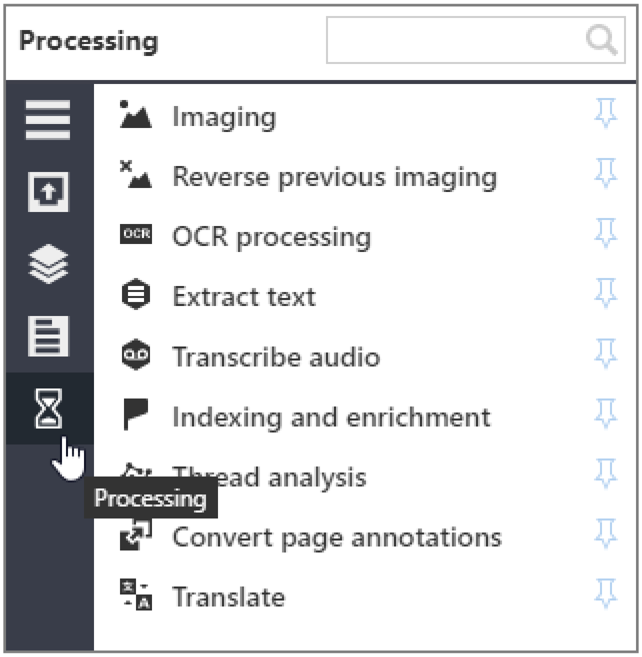
General: The tools in this grouping include **History**, **Load search file**, **Workflow**, **Quick code**, **Add document**, **Coding history report**, **Document count**, and **Theme**, as shown in the following figure.



Results: The tools in this grouping include **Base docs/Renditions**, **Find masters family**, **Find family duplicates**, **Find individual duplicates**, **Remove family duplicates**, and **Remove individual duplicates**, as shown in the following figure.



Processing: The tools in this grouping include **Imaging**, **Reverse previous imaging**, **OCR processing**, **Extract text**, **Transcribe audio**, **Indexing and enrichment**, **Thread analysis**, **Convert page annotations**, and **Translate**, as shown in the following figure.

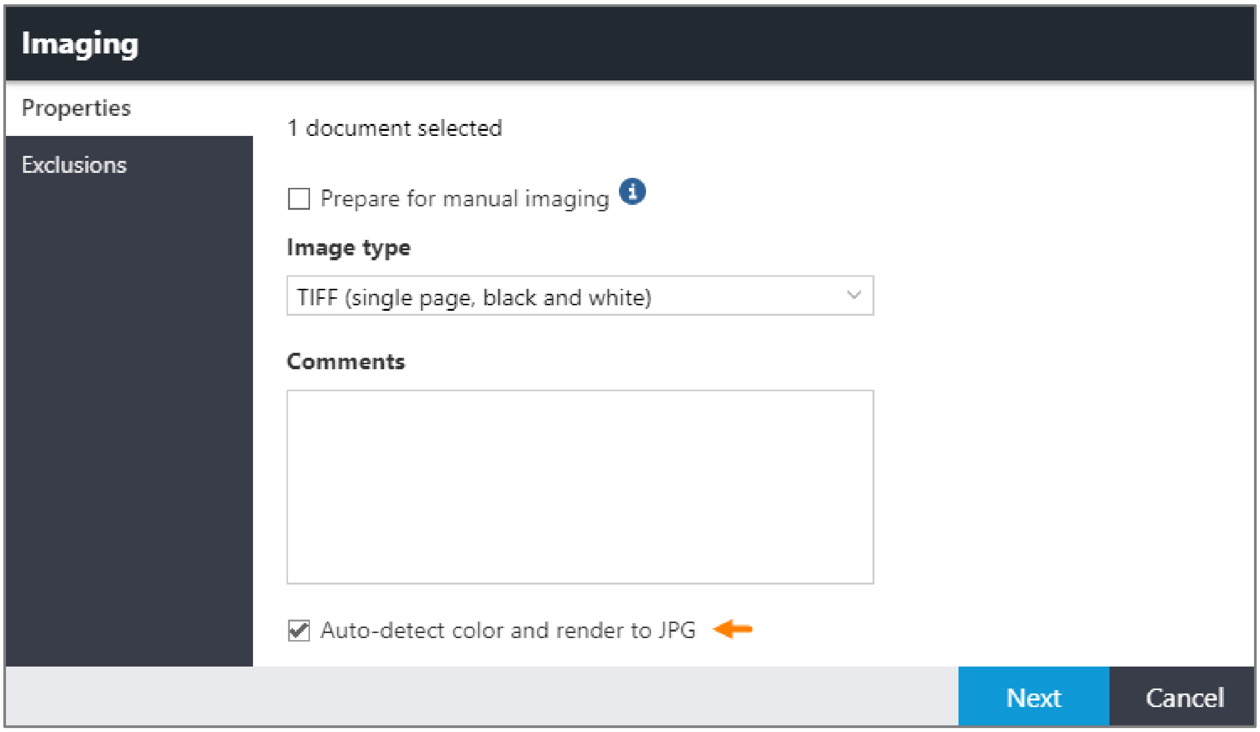


Tools > Imaging: Auto-detect color and render to JPG

When submitting documents for imaging, you can now select an option to automatically detect color and render to JPG. The **Auto-detect color and render to JPG** check box is located in the **Imaging** window on the **Properties** page, as shown in the following figure.

Note: This option is available only if the **TIFF** option is selected from the **Image type** list.

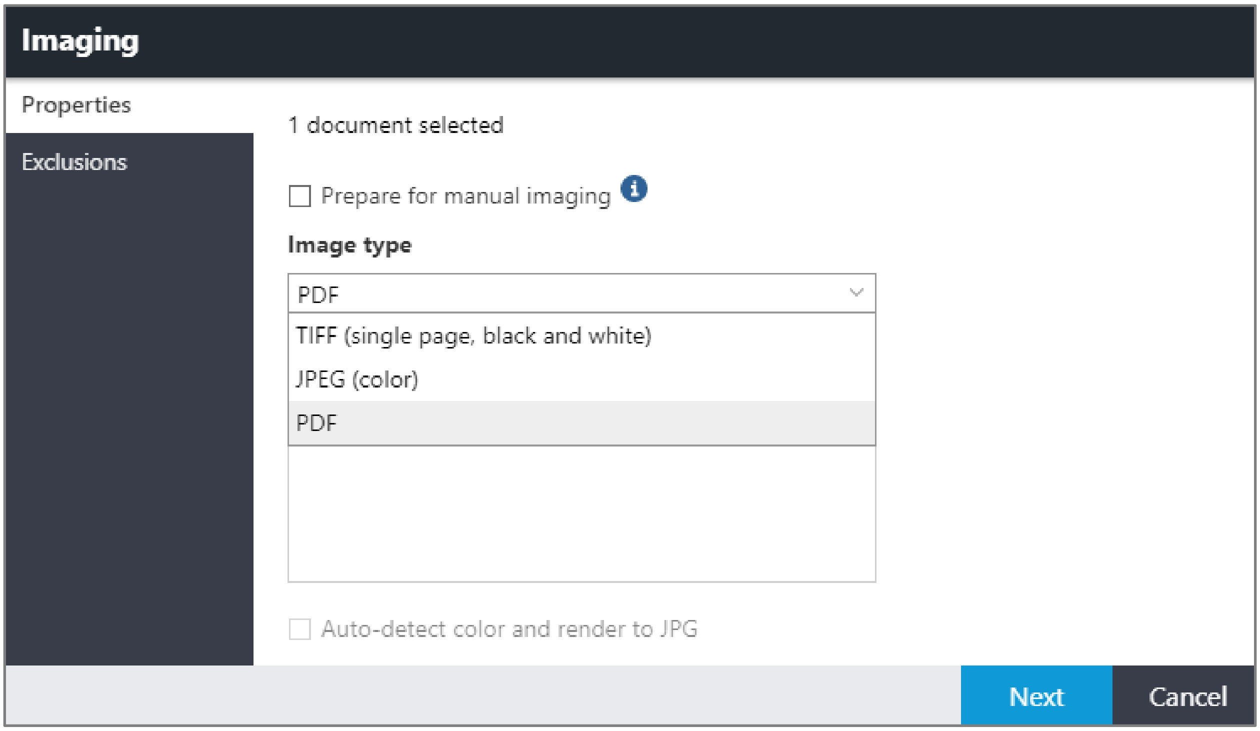
The default value for the option is based on the Imaging settings found in **Manage Documents** > **Imaging - Automated** > **Settings**.



Tools > Imaging: Image viewer support for Adobe Photoshop file formats (.psd and .psb)

In the **Imaging** window, you can now submit .psd and .psb files, which are Adobe Photoshop file formats, for imaging to a TIFF, JPEG, or PDF format, as shown in the following figure.

Once the files are imaged, you can view the imaged files in the **Image viewer** in the **View** pane.



Tools: Access to Transcribe audio and Translate options

Users can now use the **Transcribe audio** and **Translate** options on the **Tools** menu, even if they do not have access to private binders.

Tools > Coding History: Coding history report on the Tools menu

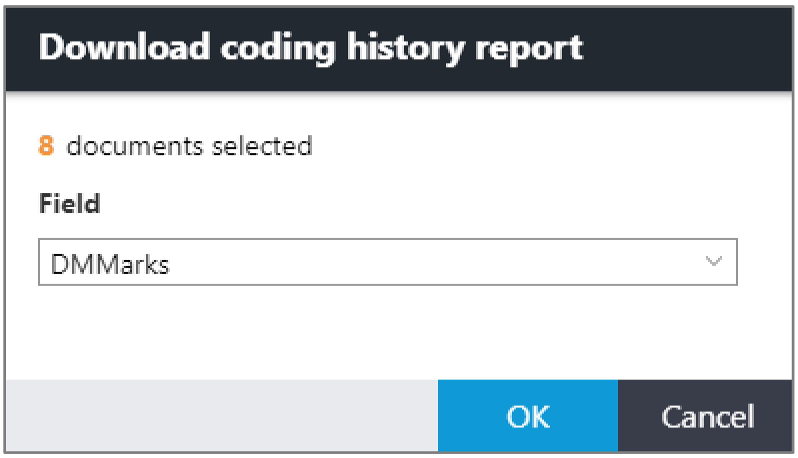
The **Tools** menu on the **Documents** page now includes a **Coding history report** option that allows you to download a .csv report with the history for a field for all documents selected in the **List** pane.

Note: To see this option, your administrator must grant you access to the **Coding - Coding History** feature on the **Security** > **Features** page, and audit history must be configured for the case.

Use the following procedure to generate a coding history report.

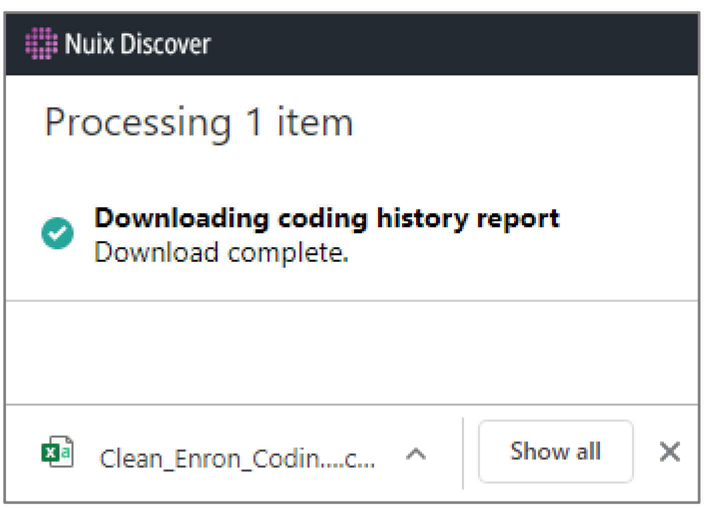
1. In the **List** pane, select one or more documents.
2. On the **Tools** menu, select the **Coding history report** option.
3. In the **Download coding history report** dialog box, shown in the following figure, from the **Field** list, select a field, and then click **OK**.

   Note: The available fields depend on the permissions granted by your administrator.



A processing window appears, as shown in the following figure.

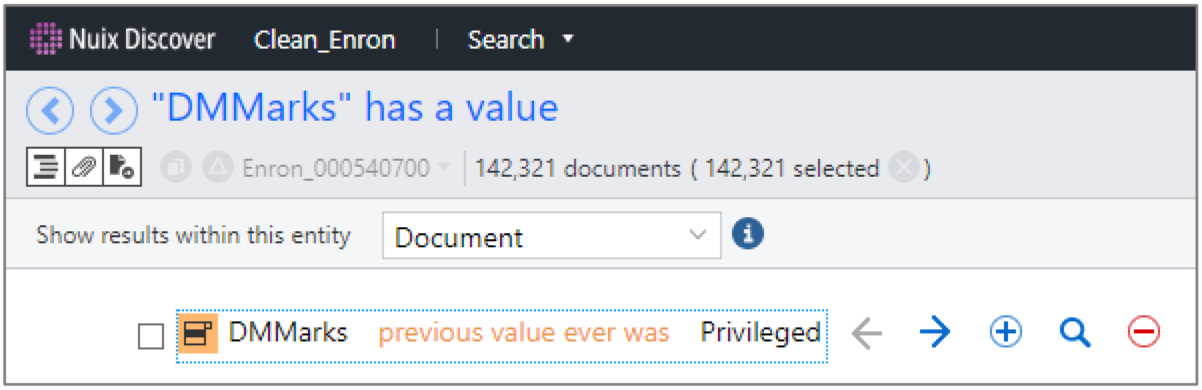
Note: Do not close this window or exit the case until the report downloads.



4. After the .csv report downloads, open or save the file.

Coding History > Search: New operator to search for previously coded values

A new operator named **previous value ever was** is now available for advanced searches on the **Search** page, as shown in the following figure.



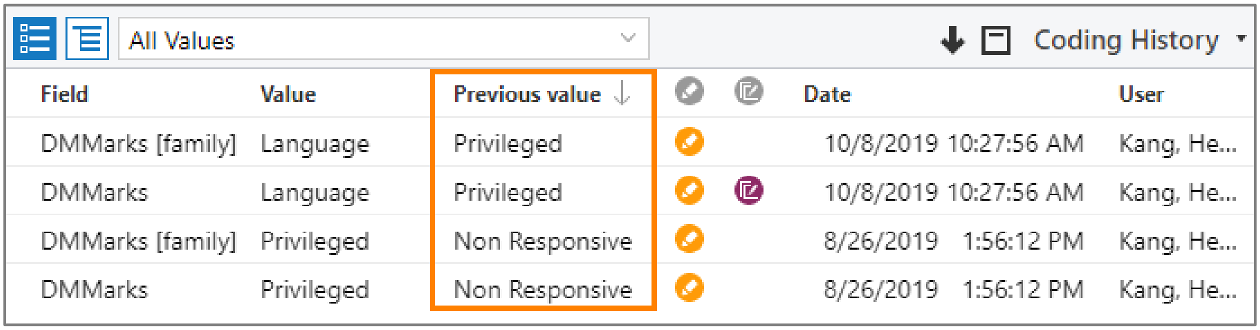
Note: The **previous value ever was** operator is available to users who are in a group with permissions to access the **Coding History** pane. And audit history must be configured for the case.

The following field types support coding history searches using the **previous value ever was** operator:

Note: Memo field types are not supported.

- Pick list
- Date
- Number
- Yes/no
- Text
- Binder - Shared
- Issue
- Production
- Population
- Sample
- Highlight
- Redaction
- People - correspondence type
- Organizations - correspondence type

When using this operator, you can search for previously coded values, which are the values captured by the Coding History feature and found in the **Previous value** column in the **Coding History** pane, as shown in the following figure.



Use the following procedure to search for previously coded values.

1. Navigate to the **Search** page.
2. In the **Select a field** box, select the field for your search criteria.
3. In the **Select an operator** box, select **previous value ever was**.
4. In the **Select a value** box, select or enter the value.

Note: Not all values for your selected field may be available in the **Select a value** list. Values are not available for **previous value ever was** searches until they have been stored in coding history (for at least one audit record).

When searching for a text field value using the **previous value ever was** operator, the text field value must be an exact match.

5. Optionally, to include **Coded by** or coded on date parameters in your search criteria, click the **Add additional criteria** button.

Note: Coded by and coded on date parameters will be evaluated against the user and date corresponding to the original coding action for the value.

6. To run the search, click the **Search** button.

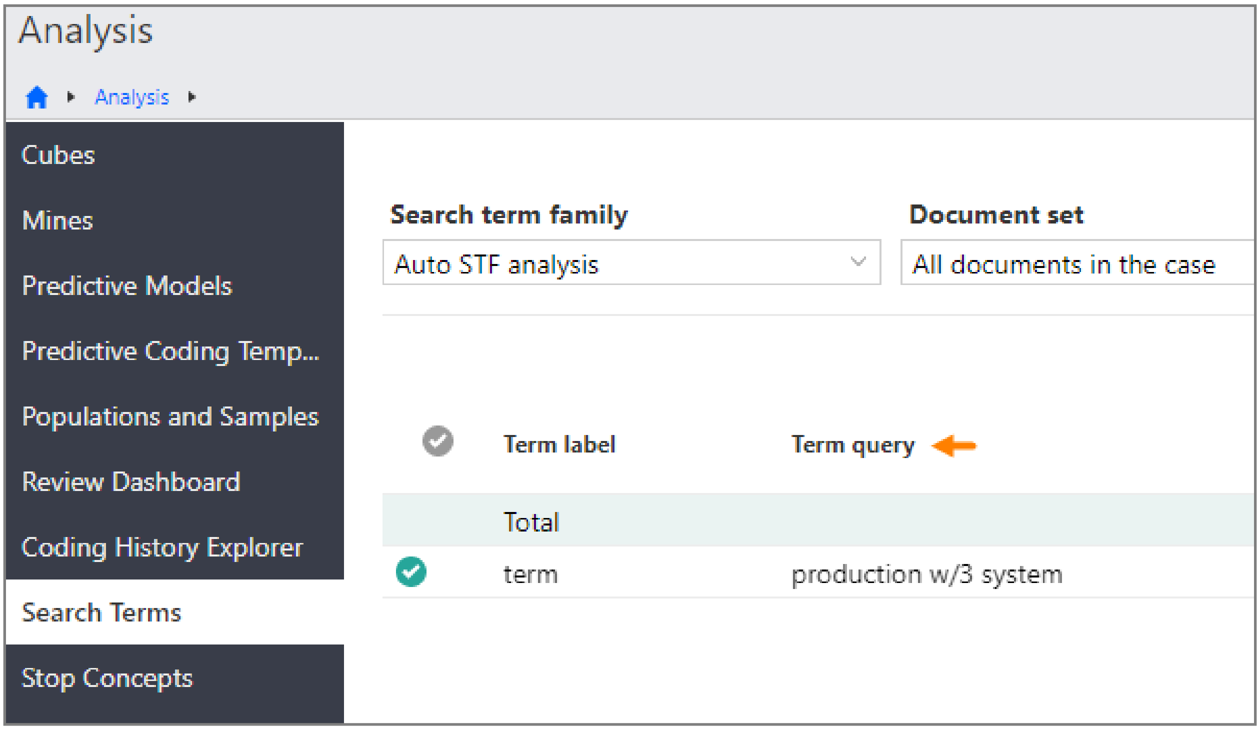
What’s new for case administrators

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

Analysis > Search Terms: Term query column added

The **Analysis > Search Terms** page now includes a new column named **Term query**, as shown in the following figure. This column contains the term query value or values for a Search Term Family.

You can use the information in the **Term query** column to effectively determine how to modify the search to increase or decrease the number of hits.



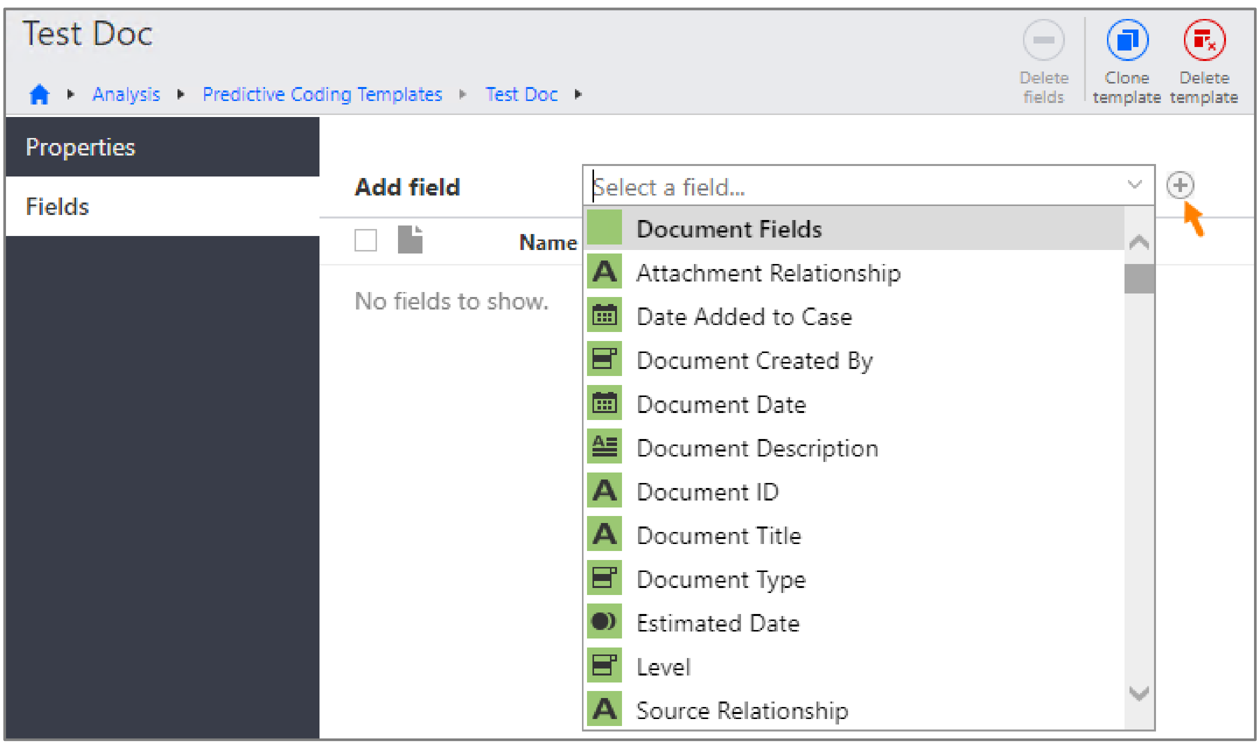
Analysis > Predictive Coding > Add custom Predictive Coding Templates

The **Predictive Coding Templates** page has been added to the Analysis capabilities in Nuix Discover and is available to all administrators. This page allows administrators to select the **Standard** or **Standard + people** template when setting up predictive coding or Continuous Active Learning (CAL) models, or to create their own templates.

Note: The **Standard** and **Standard + people** templates are available to all cases and cannot be modified.

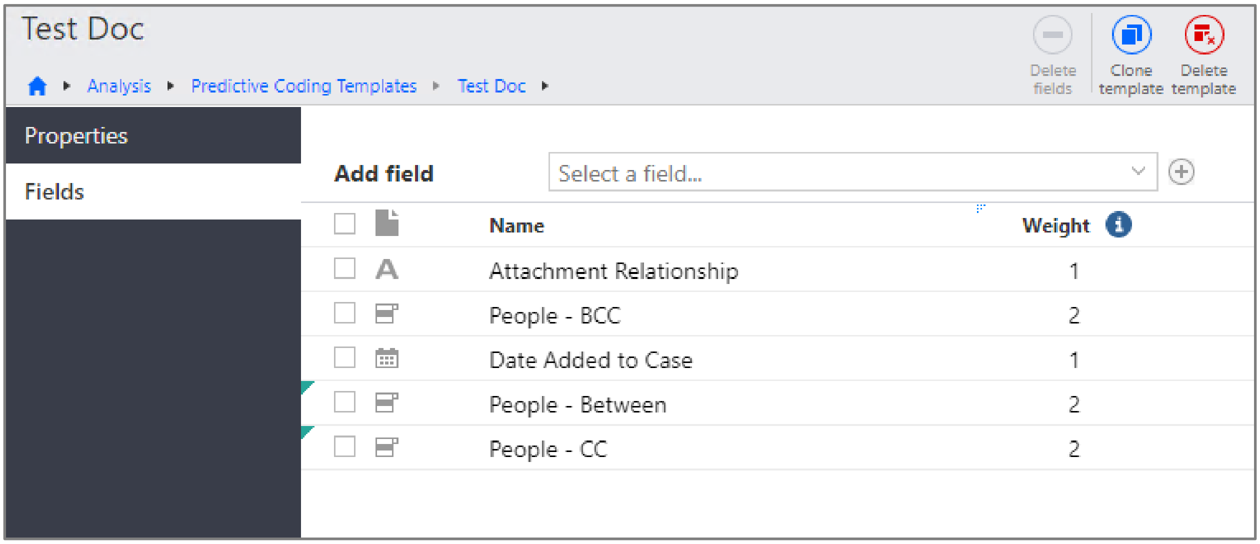
Create a new Predictive Coding Template

To create a new template, go to the **Case Home** > **Analysis** > **Predictive Coding Templates** page and click **Add**. Add a name and description for the template, and then click **Save**. The **Fields** page opens for that template. To add fields to the template, select a field in the **Add field** list and click the **+** (plus sign) button, shown in the following figure.



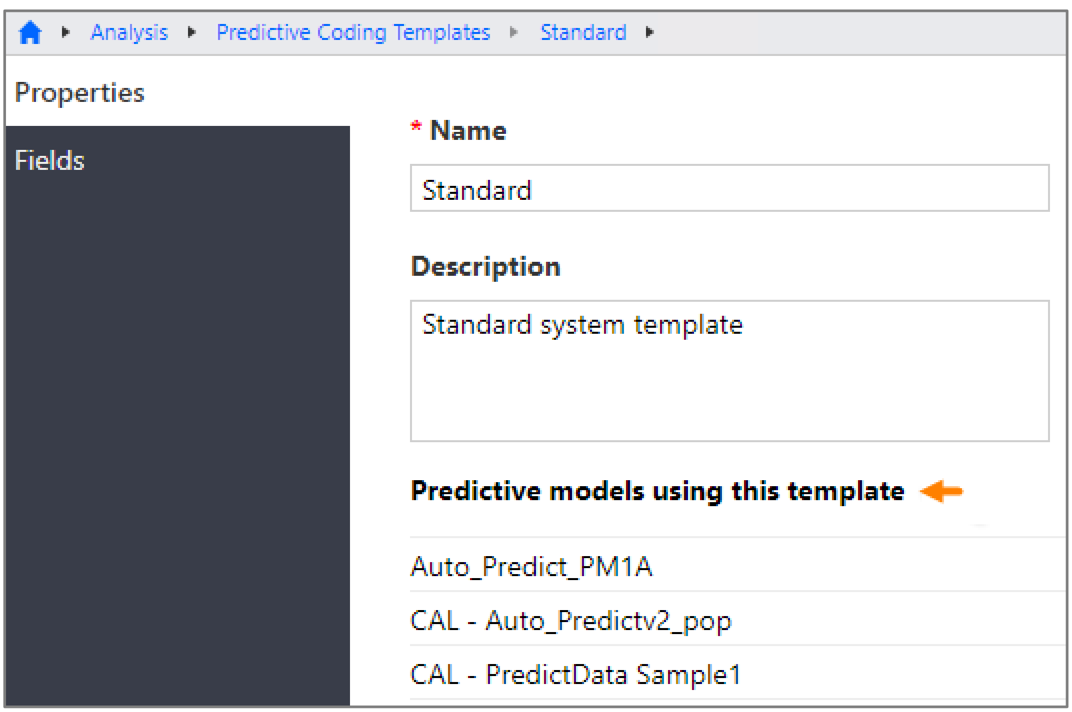
The following information applies to fields in a predictive coding template.

- The values of date fields included in a template appear as text strings.
- The weight for each field is 1 by default, but you can change the value to anything between 1 and 10. Weight reflects the amount of influence a field has on the model in relation to other fields in the template. For example, if you want **People** information to be more heavily considered in the model than other fields, adjust the weight value on the **People** fields to be higher than the other field weight values.



The following information applies to all custom predictive coding templates.

- Extracted text from documents is included in every template, although it is not listed as an item in the template. The training field for the model that the template is selected for is also included.
- Once a template is being used by a CAL or predictive coding model, it cannot be edited. Open the template's **Properties** page to view the names of the models that are using the template.



Clone a Predictive Coding Template

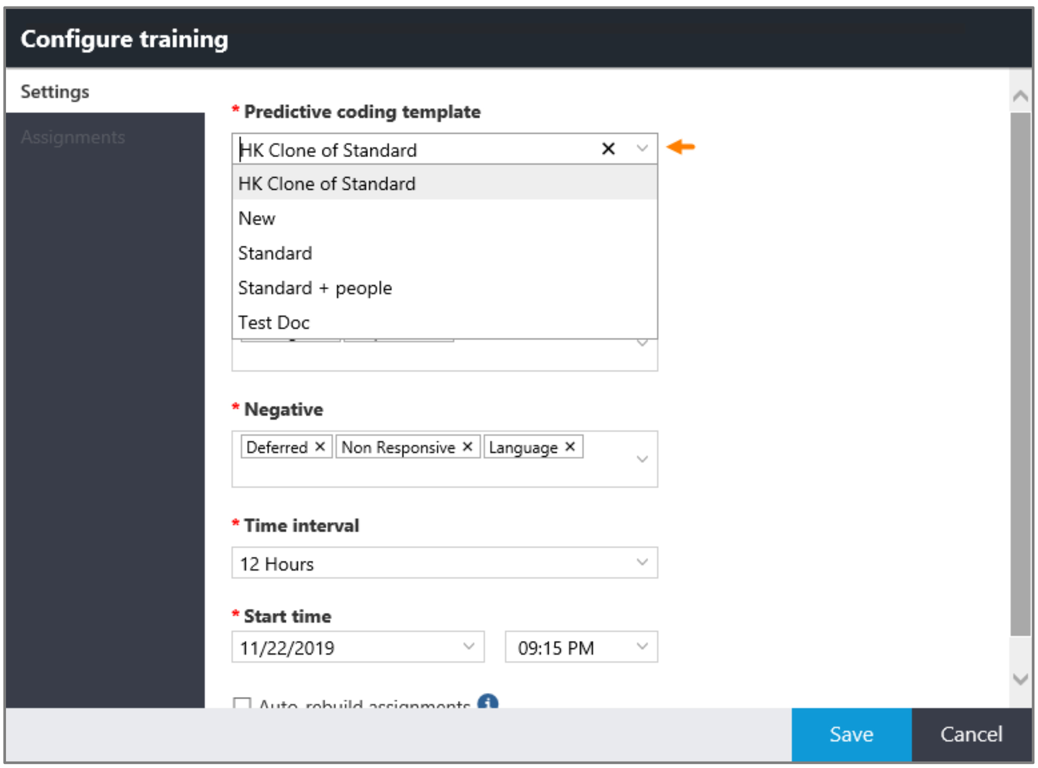
All custom templates can be cloned, regardless of whether they are in use. To clone a template, open the **Fields** page for the template and click **Clone template**. Update the template name as needed and click **Save**. The **Fields** page for the new template opens. Add fields, delete fields, or change any of the field weights on that page.

Delete a Predictive Coding Template

You can delete any custom predictive coding template that is not in use by a predictive coding or CAL model. To delete a template, open the **Fields** page for the template and click **Delete template**.

Use Predictive Coding Templates with CAL

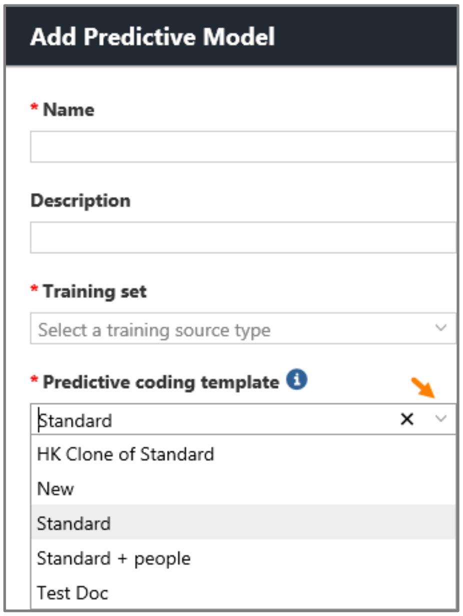
Administrators now have the option to select a predictive coding template when configuring training for a model. To select a template, go to the **Case Home** > **Analysis** > **Populations and Samples** page and select a population. Then, open the **Predictive Coding** page for the population and click **Configure training**. On the **Settings** page, select a template in the **Predictive coding template** list.



Note: You can change the predictive model template throughout the lifecycle of the training model. However, at the present time, the application only provides data about the current template selected for training and does not record the history of different templates that have been selected.

Use Predictive Coding Templates with the Predictive Coding standard workflow

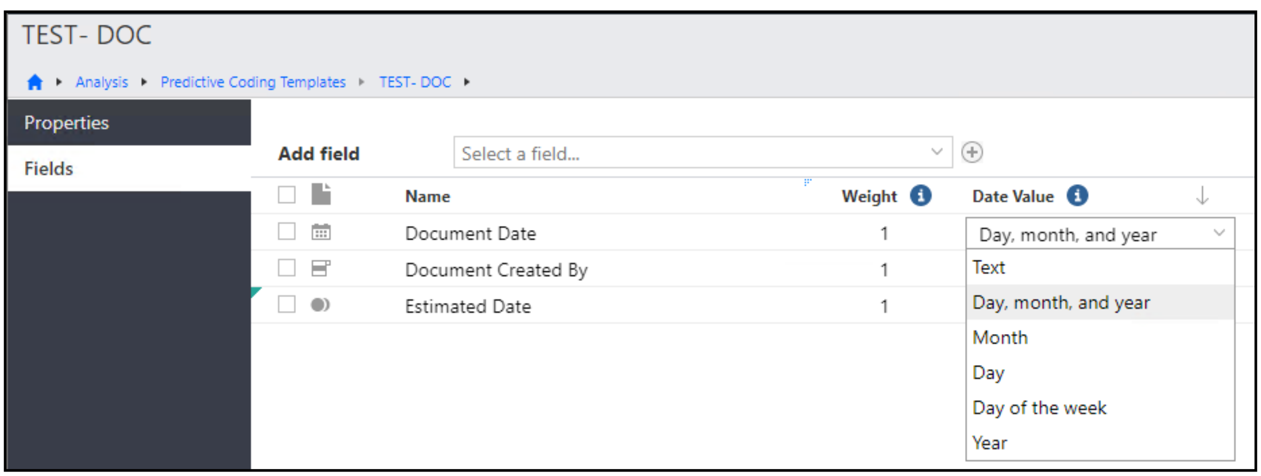
To select a predictive coding template to use when adding a predictive model, go to the **Case Home** > **Analysis** > **Predictive Models** page and click **Add**. In the **Add Predictive Model** dialog box, select a predictive coding template in the **Predictive coding template** list.



Select how date data is treated for Predictive Coding templates

We have added an option to Predictive Coding Templates that allows administrators to select how date type field data should be treated in the model.

To access the option, go to **Analysis** > **Predictive Coding Templates** and select a template. On the **Fields** page, click in the **Date Value** column, and then select a value for how date information should be treated in the template.



The options are as follows:

- **Text:** Date information is treated as a text string.
- **Day, month, and year:** Date information is modeled without time. This option is the default.
- **Month:** Date information is treated as a number with January = 1, February = 2, and so on.
- **Day:** Date information is treated as a number.
- **Day of the week:** Date information is treated as a number with Sunday = 1, Monday = 2, and so on.
- **Year:** Date information is treated as a number.

Note: The application treats any date fields selected in templates created before this change as Text. If the template is used in any models, the date value cannot be changed. The choice of which Date Value option to use depends on the case data and what aspect of the date information has an impact on the model. For example, documents with dates clustered around the middle of January 2005 may be meaningful. Select the **Day, month, and year** value to model date information in that way. In a different example, which day of the week a date falls on (Monday, Tuesday, and so on) has some relevance. Use the **Day of the week** value to model date information in that way.

Case Setup: Introducing the Hierarchies feature

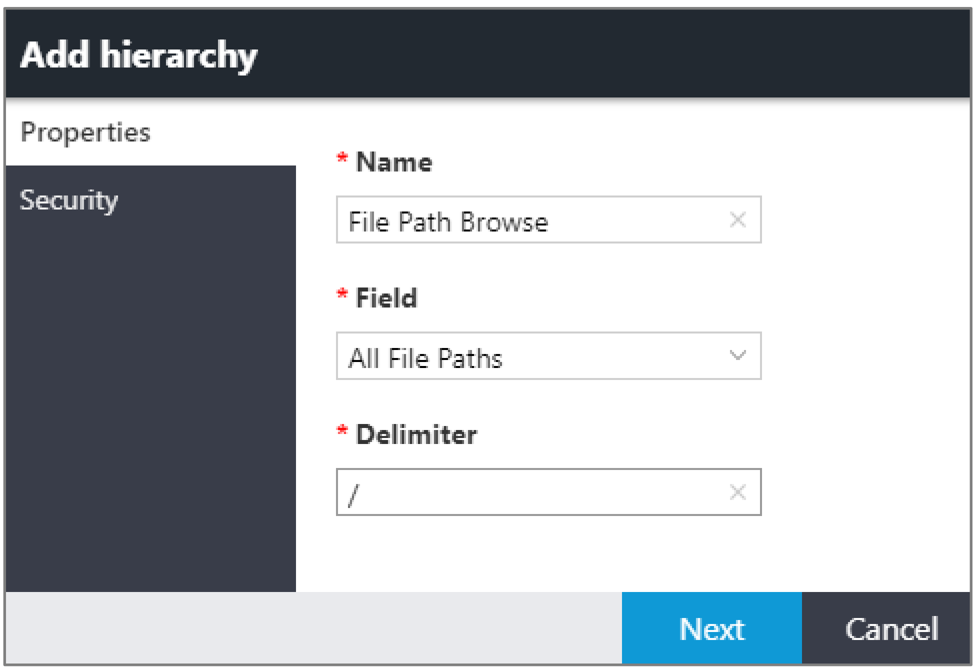
This release includes a new feature on the **Case Setup > Hierarchies** page that you can use to set up hierarchies, for example, to browse the folder hierarchy of a file path for a custodian.

Once you have set up hierarchies and granted access to user groups, users can view the hierarchies in the **Browse** pane.

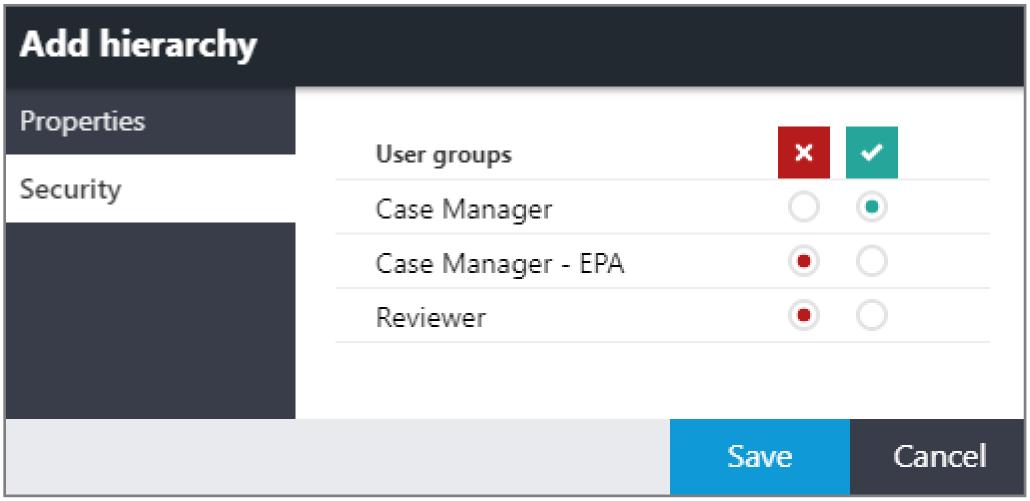
Note: Administrators can grant group leaders access to this feature by setting the **Case Setup - Hierarchies** to **Allow** for Leaders on the **Security > Administration** page.

Use the following procedure to add a hierarchy.

1. On the **Case Setup > Hierarchies** page, on the toolbar, click **Add**.
2. In the **Add hierarchy** window, shown in the following figure, on the **Properties** page, do the following:
    - Provide a **Name**.
    - Select a **Field**, for example, **All File Paths**.
    - Select a **Delimiter**.
    - Click **Next**.



3. On the **Security** page, shown in the following figure, set the security for groups, and then click **Save**.



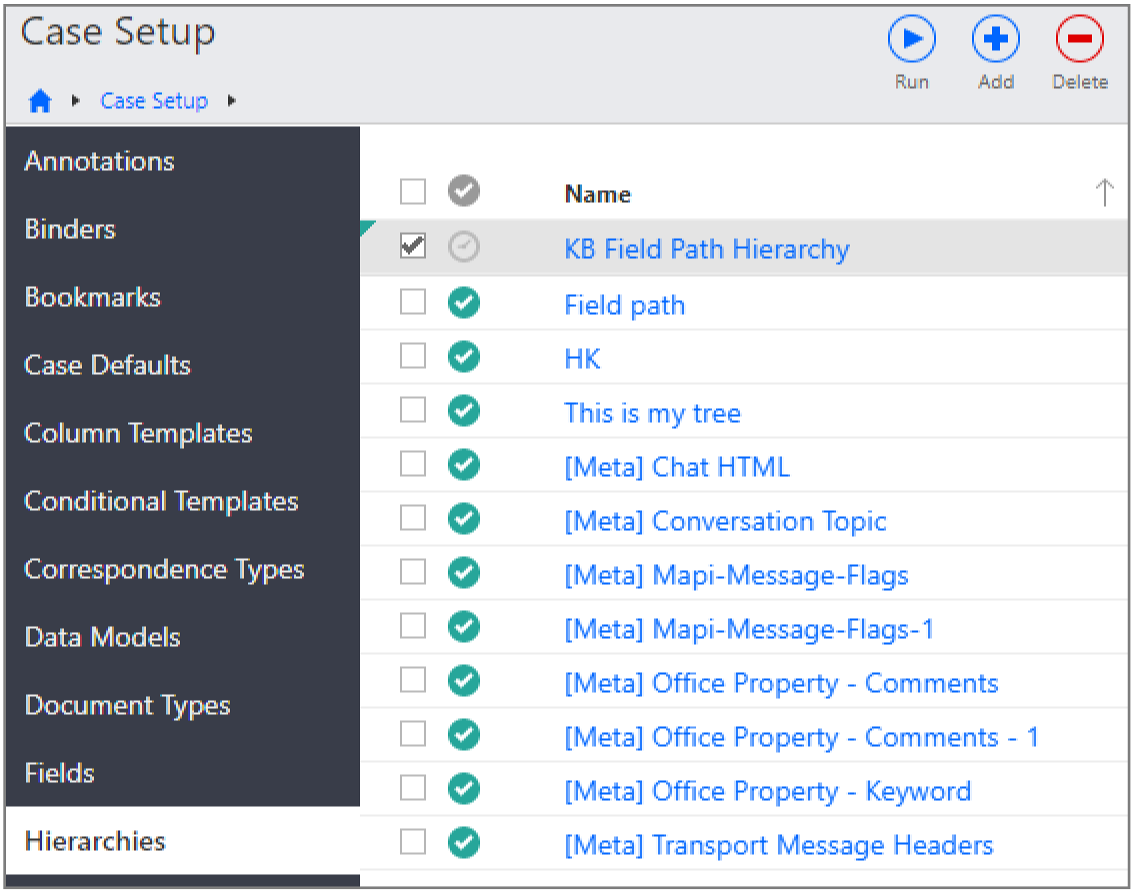
The hierarchy appears on the **Hierarchies** page, as shown in the following figure.

After you create a hierarchy, you must run an indexing and enrichment job to populate and update the hierarchy.

Note: As documents are added to the case and submitted or resubmitted for indexing and enrichment, the hierarchies are updated as part of those jobs.

Use the following procedure to run an indexing and enrichment job for a hierarchy.

1. On the **Case Setup > Hierarchies** page, select the check box next to a hierarchy, as shown in the following figure.
2. On the toolbar, click **Run**.



Use the following procedure to delete a hierarchy.

1. On the **Case Setup > Hierarchies** page, select the check box next to a hierarchy, as shown in the previous figure.
2. On the toolbar, click **Delete**.

Case Setup > Binders: New workflow to add a binder

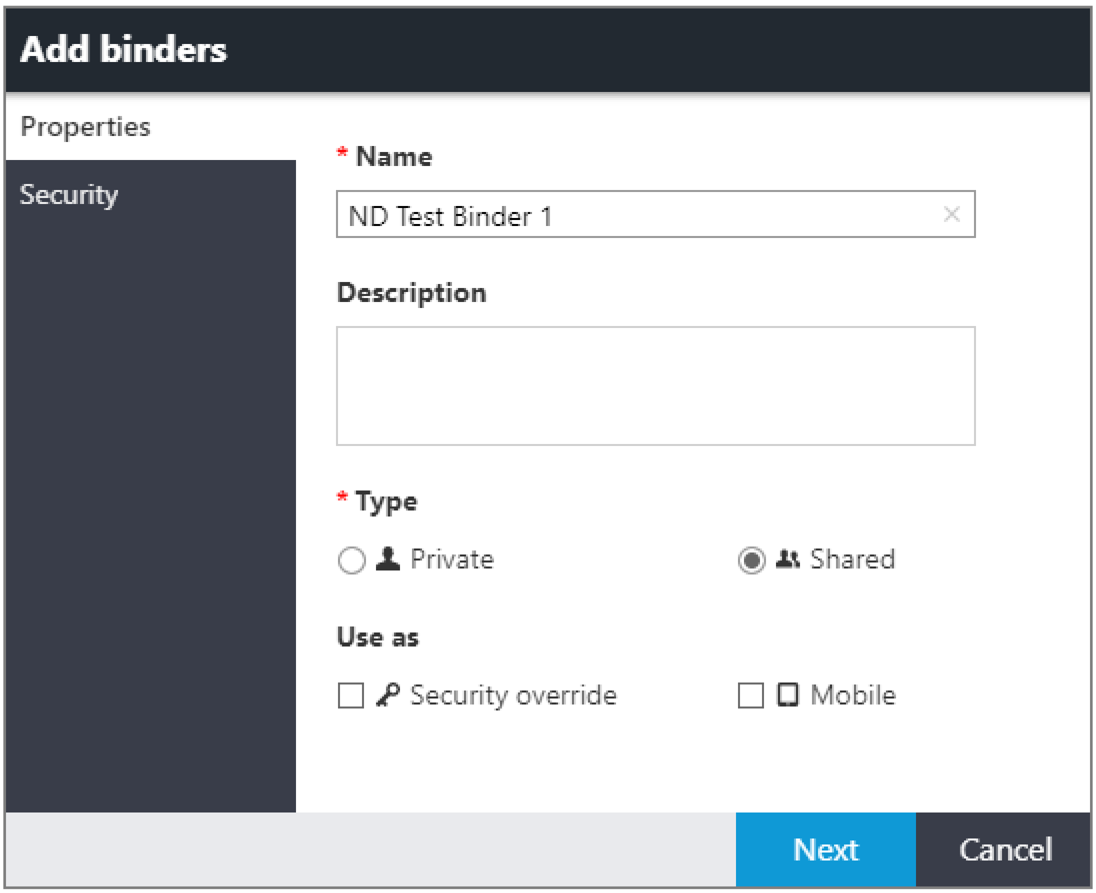
On the **Case Setup** > **Binders** page, the workflow to add a binder has been streamlined. When you add a binder, you can now set the properties and the security in a wizard-like fashion. Previously, you had to add a new binder, and then access the new binder to set the security.

Note: If you need to edit an existing binder or a newly created binder, you must do that on the **Case Setup** > **Binders** > **Properties** and **Security** pages for a binder.

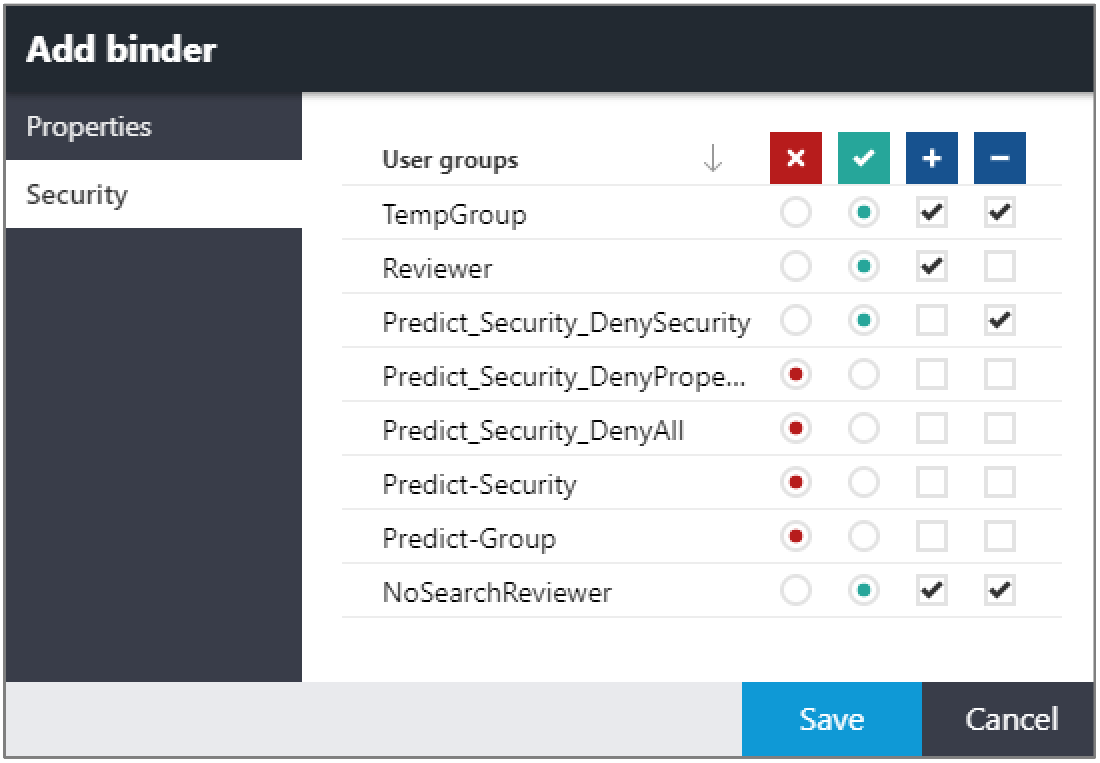
Add a shared binder

Use the following procedure to add a shared binder and set the security for the binder.

1. On the **Case Setup** > **Binders** page, on the toolbar, click **Add**.
2. In the **Add binder** window, shown in the following figure, on the **Properties** page, provide a name and an optional description.



3. Under **Type**, leave the **Shared** binder type option selected.
4. Optionally, under **Use as**, set the binder to be used as a **Security override** or **Mobile** binder.
5. Click **Next**.
6. On the **Security** page, set the security for the binder, and then click **Save**, as shown in the following figure.



The new binder appears on the **Case Setup** > **Binders** page.

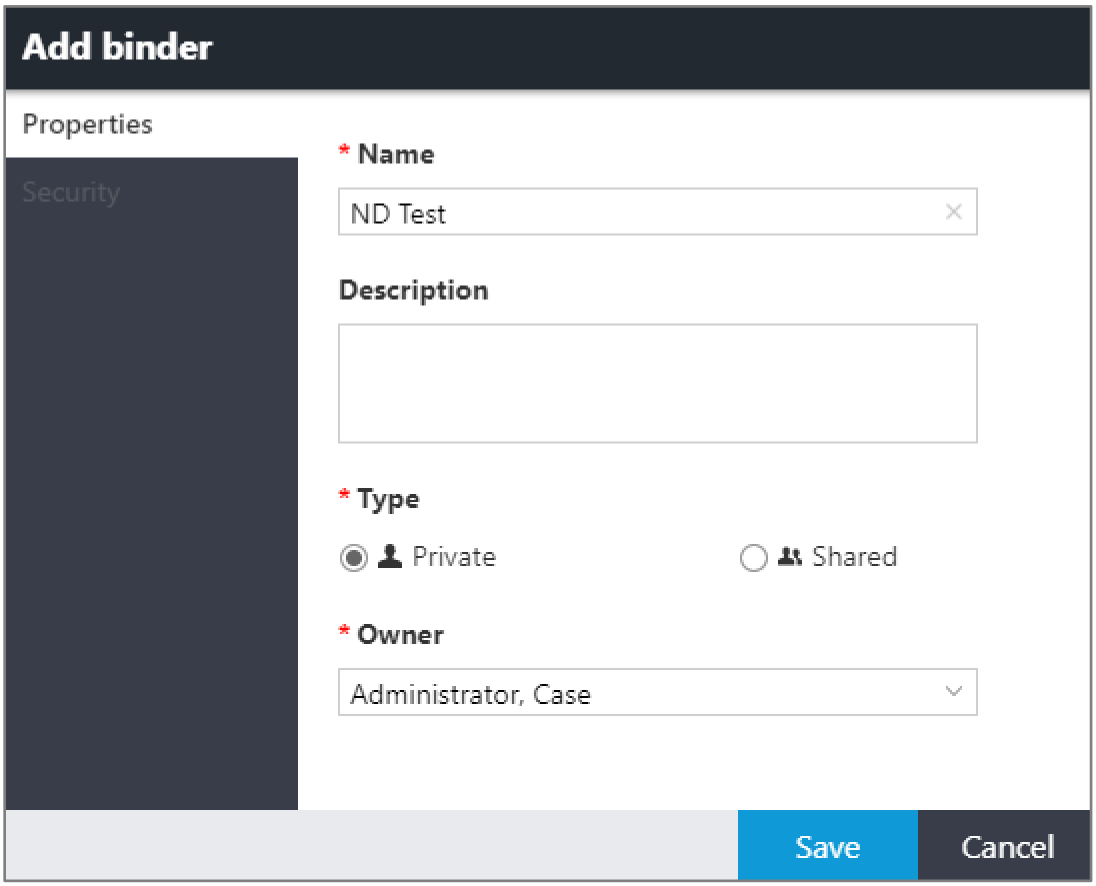
Add a private binder

Use the following procedure to add a private binder.

1. On the **Case Setup** > **Binders** page, on the toolbar, click **Add**.
2. In the **Add binder** window, on the **Properties** page, shown in the following figure, do the following:
    a. Provide a **Name** and an optional **Description**.
    b. Under **Type**, select **Private**.

    The **Owner** list appears.

    c. In the **Owner** list, select an owner.
3. Click **Save**.



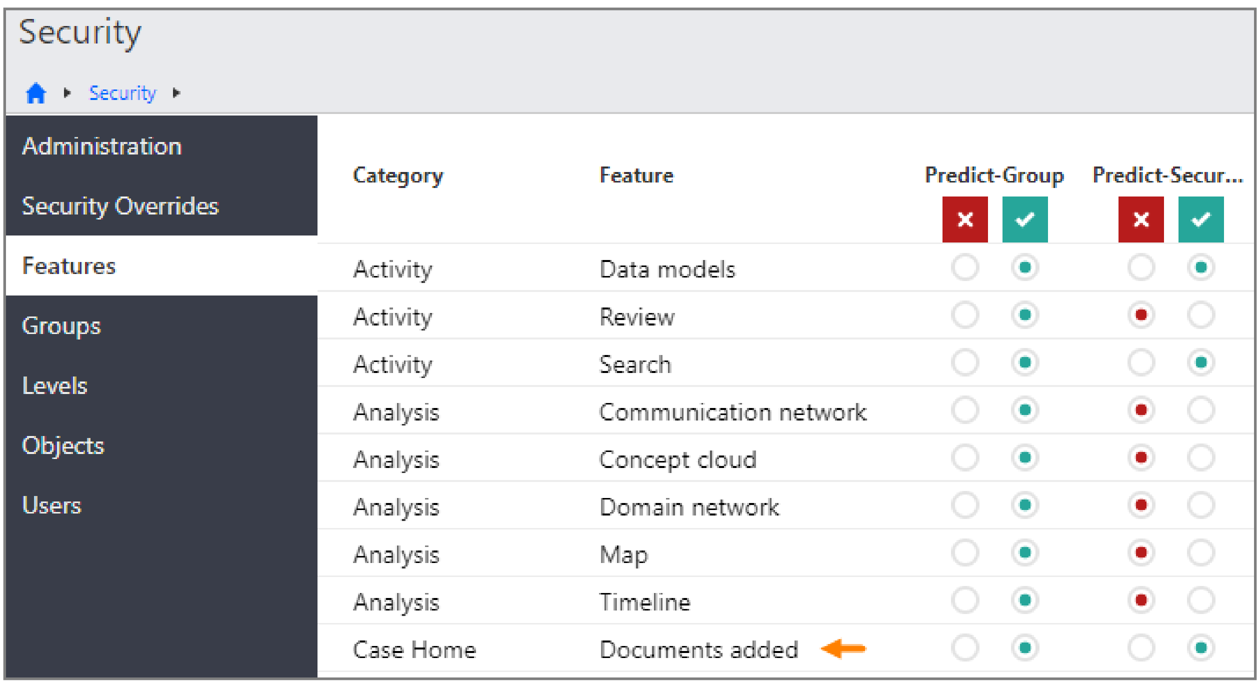
Security > Administration: Allow group leaders to add binders in the Conditional Coding pane

To allow group leaders to add binders in the **Conditional Coding** pane, you must set the **Case Setup - Binders - Properties** and **Case Setup - Binders - Security** functions to **Allow** for **Leaders** on the **Security > Administration** page.

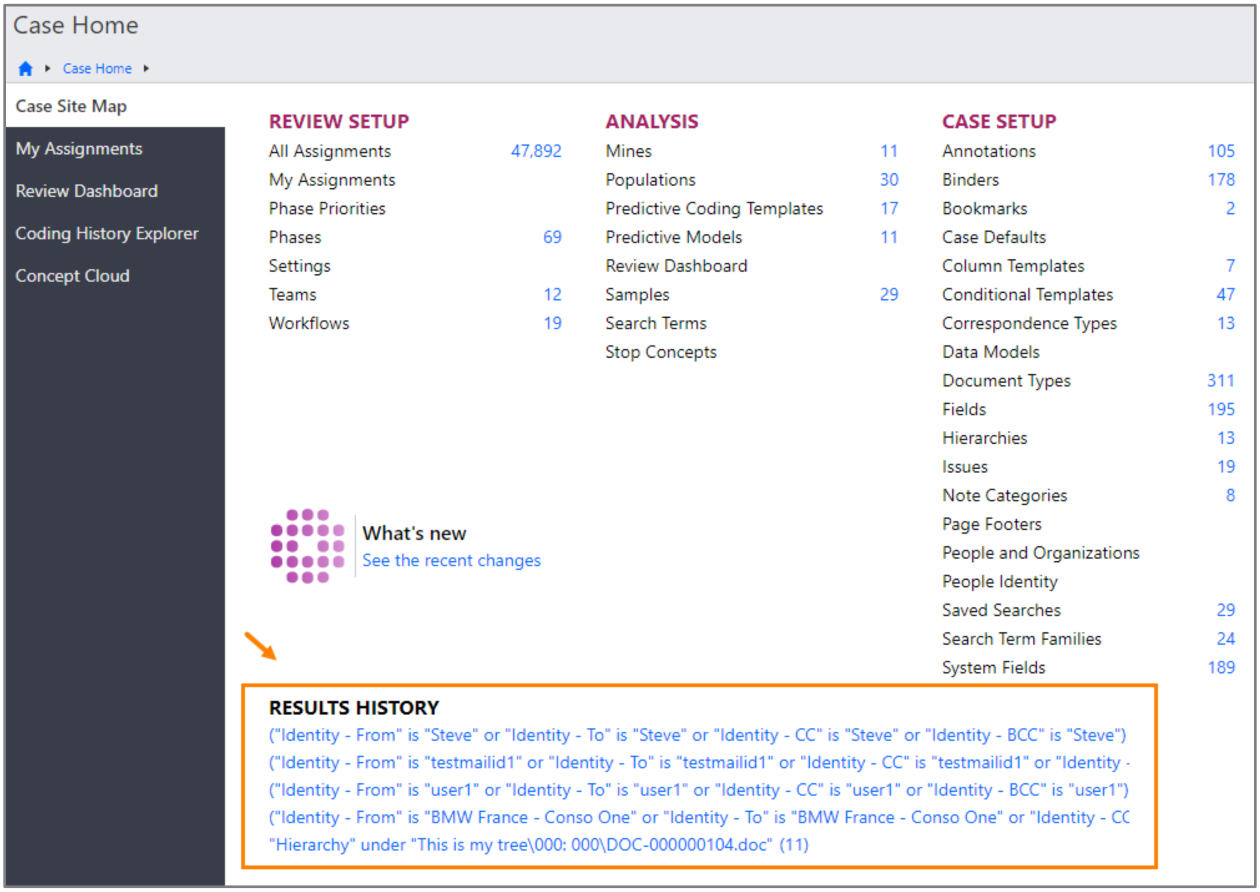
Security > Features: Set security for the Documents Added section on the Case Home page

You can set security for the **Documents Added** section on the **Case Home** page. You can choose to display or hide the **Documents Added** section by enabling or disabling the **Case Home - Documents added** feature for groups on the **Security > Features** page, as shown in the following figure.

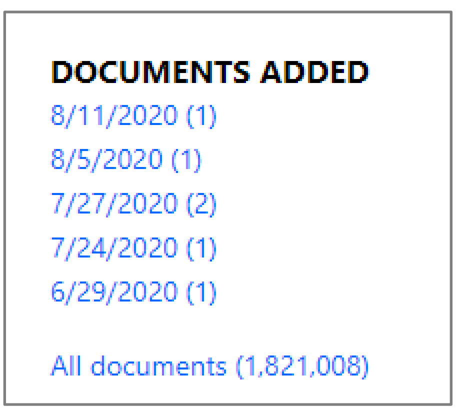
Note: This feature is set to **Deny** by default for all newly added groups. When a group is cloned, access to the **Documents Added** feature is carried over from the group it was cloned from.



When this feature is set to **Deny** for a group, the users in that group do not see the **Documents Added** section on the **Case Home** page, and the **Results History** section appears in that location, as shown in the following figure.



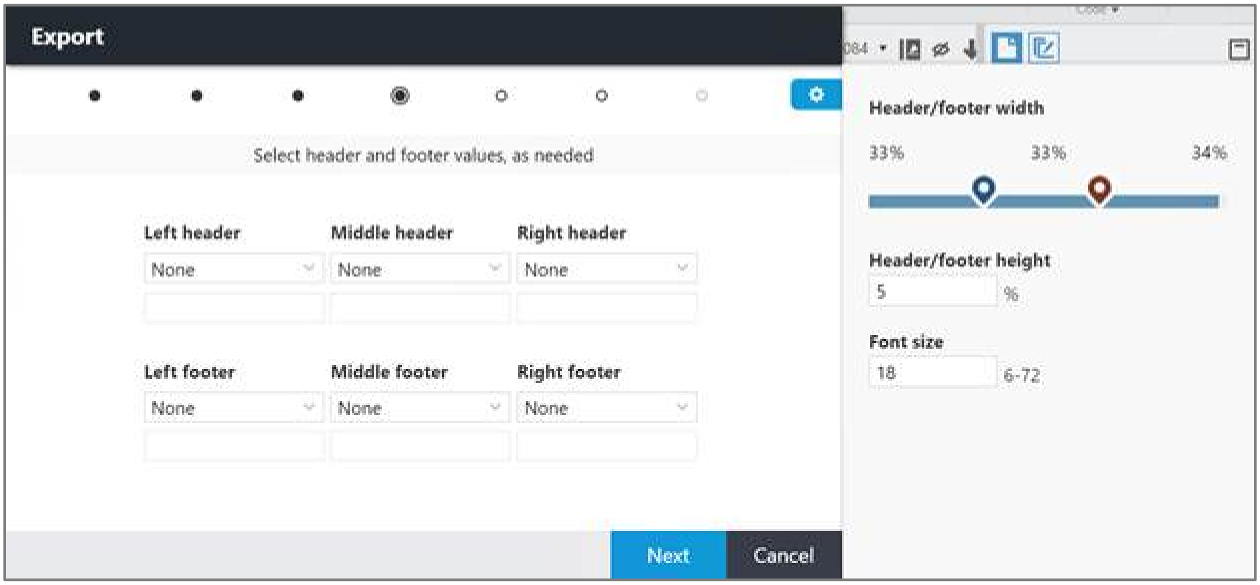
When this feature is set to **Allow** for a group, the users in that group see the **Documents Added** section on the **Case Home** page, as shown in the following figure.



Manage Documents > Exports: Ability to apply headers

Administrators now have the option to apply headers to base images in Custom and MDB Classic export types. In previous releases, only footer settings were available.

You can access header options on the **Headers/footers** page in the **Export** window, as shown in the following figure. The options available for footer values are also available for header values. You can select any combination of headers and footers.

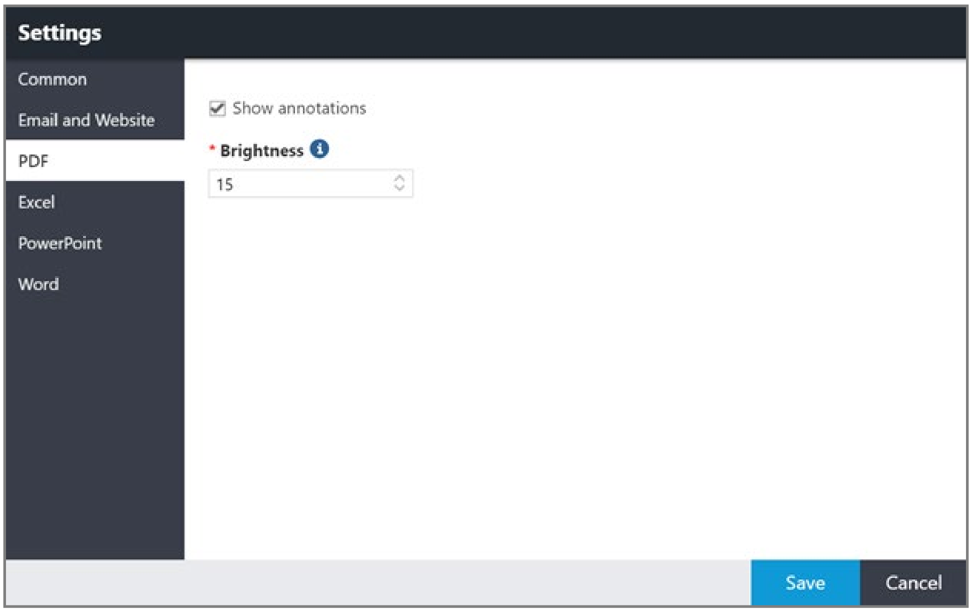


Note: The width, height, and font size are the same for both headers and footers. As with footers, the **Header height** setting allows you to add space to the top of the image when endorsing headers such that the header text does not overlap with image text.

Manage Documents > Imaging - Automated: Update default brightness setting to 15

In previous versions, when a file contained text with a background that was similar in color, converting the file to a black and white image could result in text and background that were the same color. We have updated the brightness setting to increase the likelihood that the text and background will be distinguishable in the resulting images.

In the **Manage Documents** > **Imaging - Automated** > **Settings** window, on the **PDF** page, the default brightness setting for new cases is now 15, as shown in the following figure. For existing cases, if the setting was previously 85, the value has been changed to 15. If the setting was previously anything other than 85, the value has not been changed.



Manage Documents > Imports: Delimiter column removed from Field Map for Ringtail MDB load files

Ringtail MDB load files do not support using a delimiter to separate multiple field values.

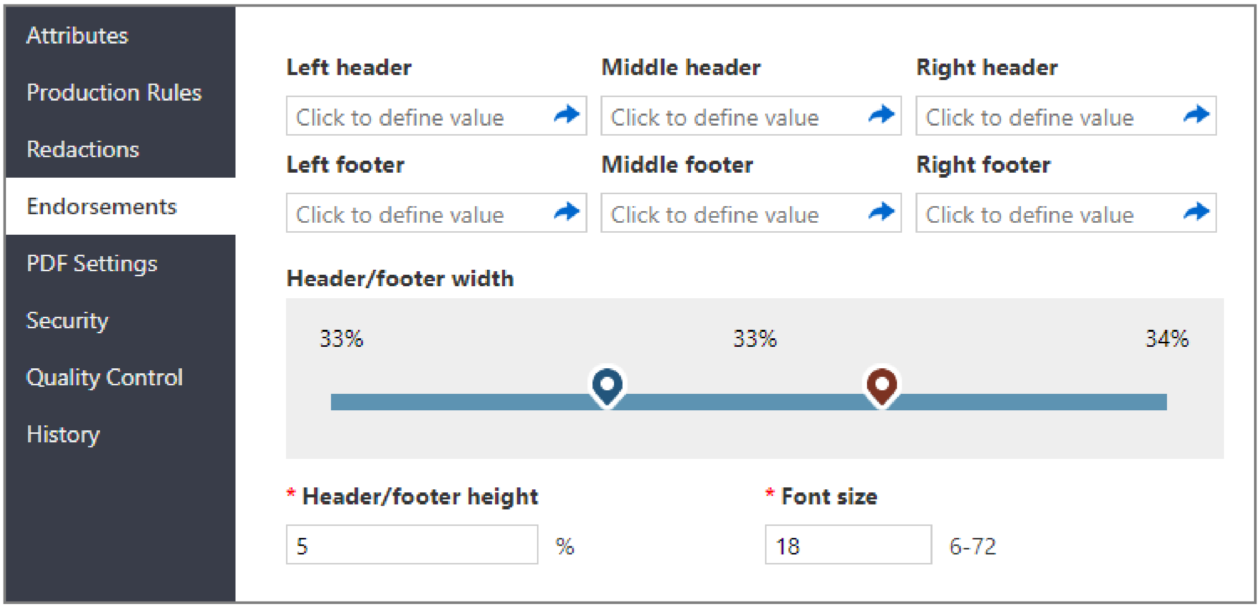
Starting with this release, when you add an import job on the **Manage Documents > Imports** page, if you select the **Ringtail - MDB** job type on the **Import Details** page in the **Import** window, the **Delimiter** column no longer appears on the **Field Map** page in the **Import** window. The **Delimiter** column still appears for a **Flat file** job.

Note: If you clone a previous **Ringtail - MDB** import job and the **Delimiter** value was set, the value is not applied to the new import job.

Manage Documents > Productions: Apply headers

Administrators now have the option to apply headers to production images. In previous releases, only footer settings were available.

You can access header options on the **Endorsements** page for a production. Click in any of the boxes for **Left**, **Middle**, or **Right header** to launch the variable builder.

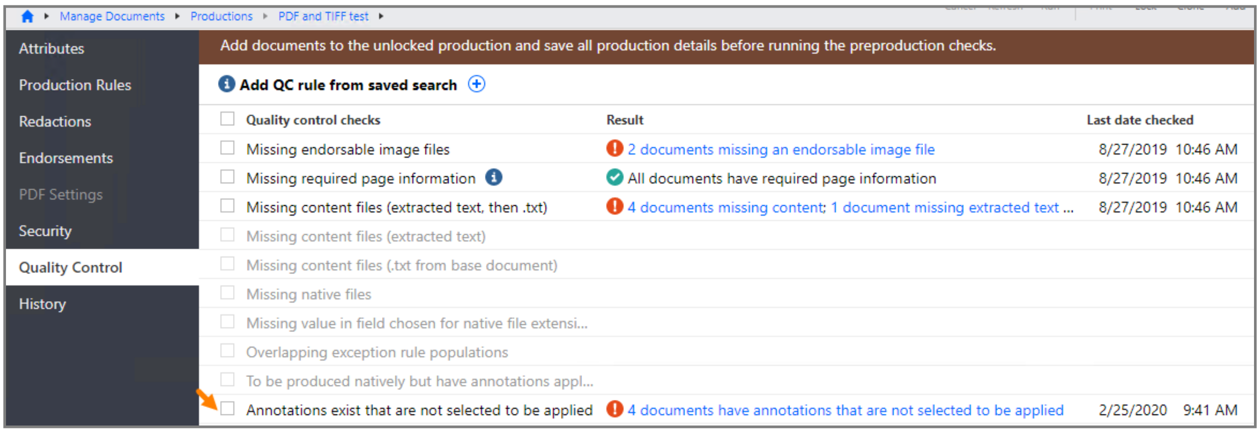


You can select any combination of headers and footers. Note that the width, height, and font size are the same for both headers and footers. As with footers, the **Header height** setting allows you to add space to the top of the image when endorsing headers such that the header text does not overlap with image text.

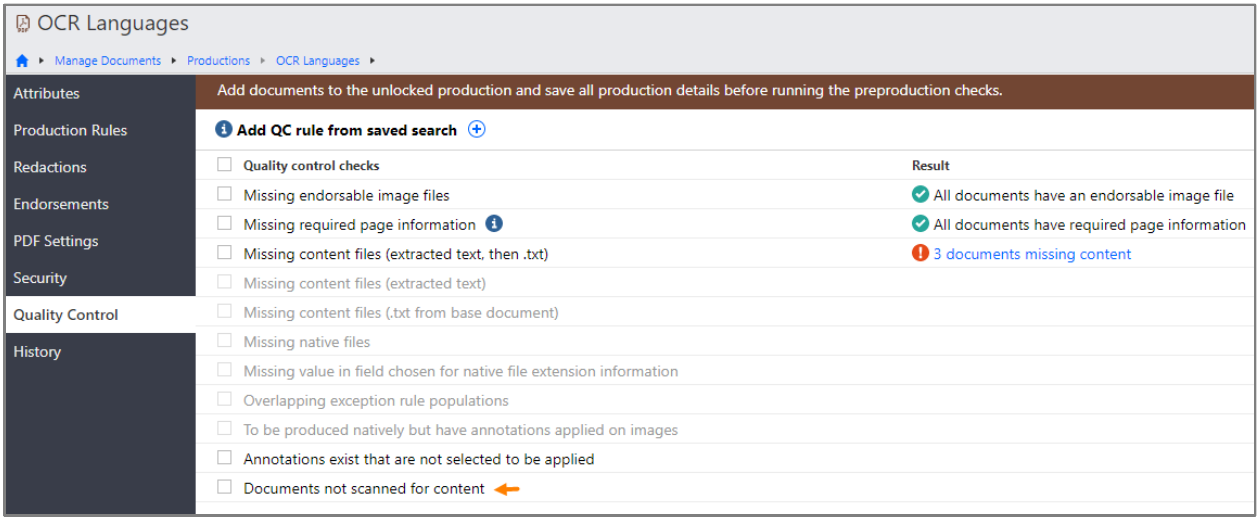
Manage Documents > Productions: New Quality Control checks

The following new quality control checks have been added to the **Quality Control** page for productions.

- An **Annotations exist that are not selected to be applied** quality control check has been added to the **Quality Control** page for productions, as shown in the following figure.
    - This check is enabled when at least one production rule other than **Custom placeholder** is selected on the **Production rules** page.
    - This quality control check identifies documents that have annotations applied to them that are not selected to be applied in the production.
    - If the application identifies any affected documents, a message that indicates the number of documents appears in the **Result** column on the **Quality Control** page for the production. Click the message to view the affected documents on the **Documents** page.

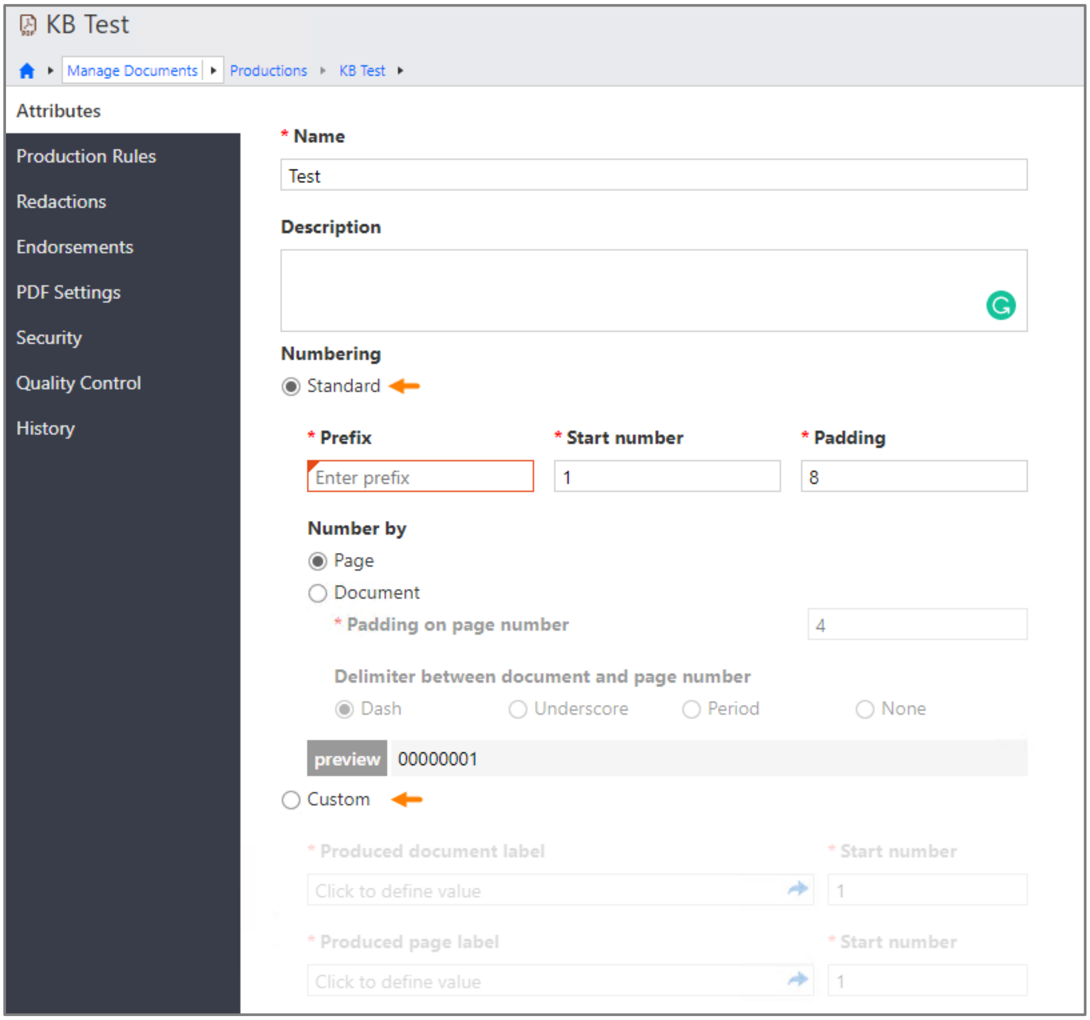


- A **Documents not scanned for content** quality control check has been added to the **Quality Control** page for productions, as shown in the following figure.
    - This checks any documents that are in a production rule and are designated to be produced as native files or content files.
    - Previously, this step was always run before locking a production, but it was not clear which documents triggered the warning. Adding this check to the Quality Control page will now provide those details.
    - If documents were not scanned for content, a message appears in the Result column on this page and lets you know which documents were not scanned for content, and indicates that you should run an Indexing and enrichment job.


OCR Languages
Manage Documents
Productions
OCR Languages
Attributes
Production Rules
Redactions
Endorsements
PDF Settings
Security
Quality Control
History
Add documents to the unlocked production and save all production details before running the preproduction checks.
Add QC rule from saved search
Quality control checks
Result
Missing endorsable image files
All documents have an endorsable image file
Missing required page information
All documents have required page information
Missing content files (extracted text, then .txt)
3 documents missing content
Missing content files (extracted text)
Missing content files (.txt from base document)
Missing native files
Missing value in field chosen for native file extension information
Overlapping exception rule populations
To be produced natively but have annotations applied on images
Annotations exist that are not selected to be applied
Documents not scanned for content

Manage Documents > Productions: New productions numbering options

The **Attributes** page of the **Productions** feature now includes new options for setting the numbering convention for production documents and files, as shown in the following figure.



The following options are available under **Numbering** on the **Attributes** page of a production:

- **Standard:** This option offers a new, simplified way to set the Production Document Label and Production Page Label. You can enter information directly into the **Prefix**, **Start number**, and **Padding** boxes. Under **Number by**, select either **Page** or **Document**. If you choose to number by document, you can enter a value for page numbering padding and choose a delimiter to use between the document and page number, if required.

The following table provides examples of page and document numbering.

	Number by page	Number by document
Doc 1 - page 1	ABC-00000001	ABC-00000001-00001
Doc 1 - page 2	ABC-00000002	ABC-00000001-00002
Doc 2 - page 1	ABC-00000003	ABC-00000002-00001
Doc 2 - page 2	ABC-00000004	ABC-00000002-00002
Doc 2 - page 3	ABC-00000005	ABC-00000002-00003
Doc 3 - page 1	ABC-00000006	ABC-00000003-00001

- **Custom:** This option is the same as in previous versions. It allows administrators to enhance customization by using the variable builder to define values.

  For productions that were locked or were created but not locked prior to this update, the selections you made for Production Document Label and Production Page Label appear in the **Custom** numbering section of the **Attributes** page.

Note: The Production Document Label determines the Rendition Document ID as well as the names of any native and content files. The Production Page Label determines the name of image files. The Production Page Label is also referred to as the Bates number. To set the Bates number as a footer, you must select the Production Page Label option, regardless of how you set up numbering on the **Attributes** page. Load file template field references to begin and end Bates and any other numbering values will not change.

Updates to the Renumbering feature

The following updates have been made to the **Renumbering** feature, which is available on the **Tools** menu:

- When endorsing headers, more space is now provided between the endorsement and the edge of the page. This reduces the potential for the endorsement to be cut off when printing documents to paper.
- The following updates have been made to the **Document ID** page in the **Renumbering** window, as shown in the following figure:
  - **Suffix delimiter:** This character is used before the page number during endorsement. The default character is a hyphen.

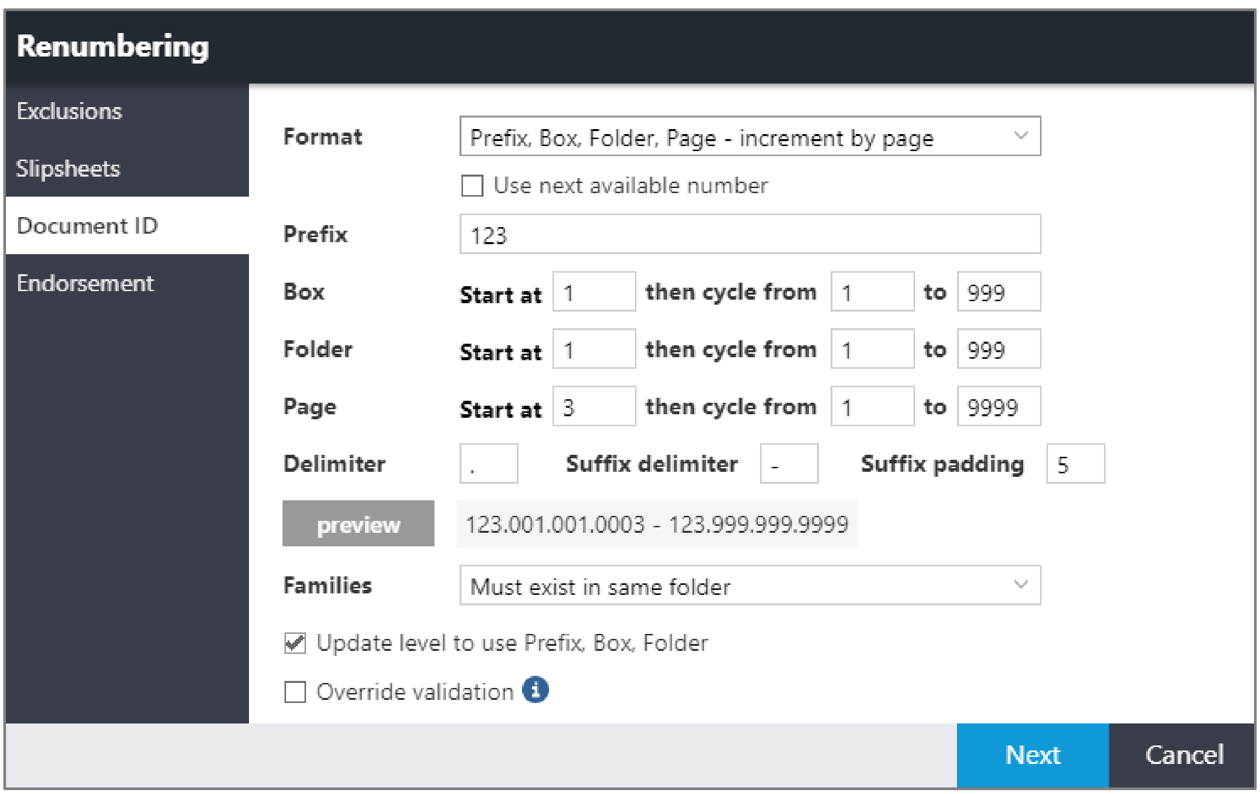
    Note: The **Suffix delimiter** that you set on this page appears on the **Manage Documents** > **Renumbering** > **Properties** page in the **Settings** > **Document ID** section.

  - **Suffix padding:** This value is used when generating a suffix during endorsement. The default value is 4. Valid values are 1 through 9.

    Note: The **Suffix padding** that you set on this page appears on the **Manage Documents** > **Renumbering** > **Properties** page in the **Settings** > **Document ID** section.

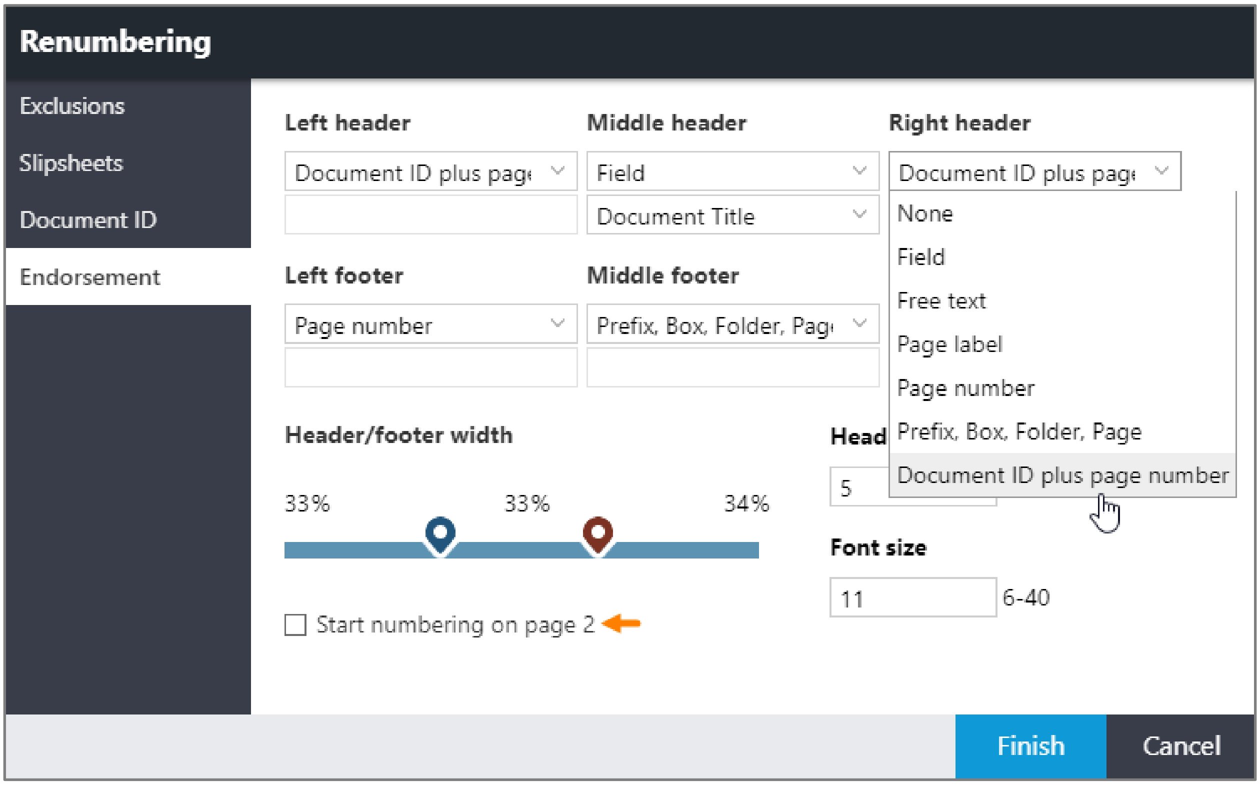
  - **Override validation:** If you select this option, the application assigns Document ID values starting with the selected value, even if there is an existing Document ID with a higher number.

    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.



- On the **Endorsement** page in the **Renumbering** window, 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.

Note: If you select the **Document ID plus page number** endorsement option on this page and select the **Start numbering on page 2** check box, the setting appears on the **Manage Documents > Renumbering > Properties** page, in the **Settings** > **Endorsements** section.



What’s new for portal administrators

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

Introducing the case archiving feature

Case archiving allows you to archive an entire case. Case archiving is available to system and portal administrators. You may want to archive a case if you no longer need the database to be readily available in Nuix Discover, but you want the option of restoring it in the future should the need arise.

When you archive a case, it is stored in a folder on the archive repository that is assigned to the case. The folder will include backup files of all three of the case databases, zip archives containing all files from the repositories assigned to the case, and a backup of the coding history index (if the case has audit enabled for coding history). After you archive a case, you can download the case files, recommission the case, or permanently delete the case.

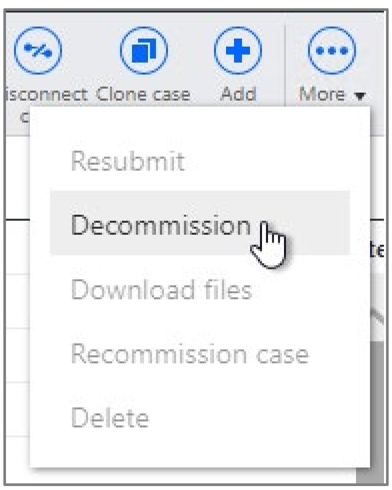
Note: Portal and system administrators can do everything described in this section.

Archive a case

You can archive an entire case using the **Decommission** option, which is available on the **More** menu on the **Cases** page.

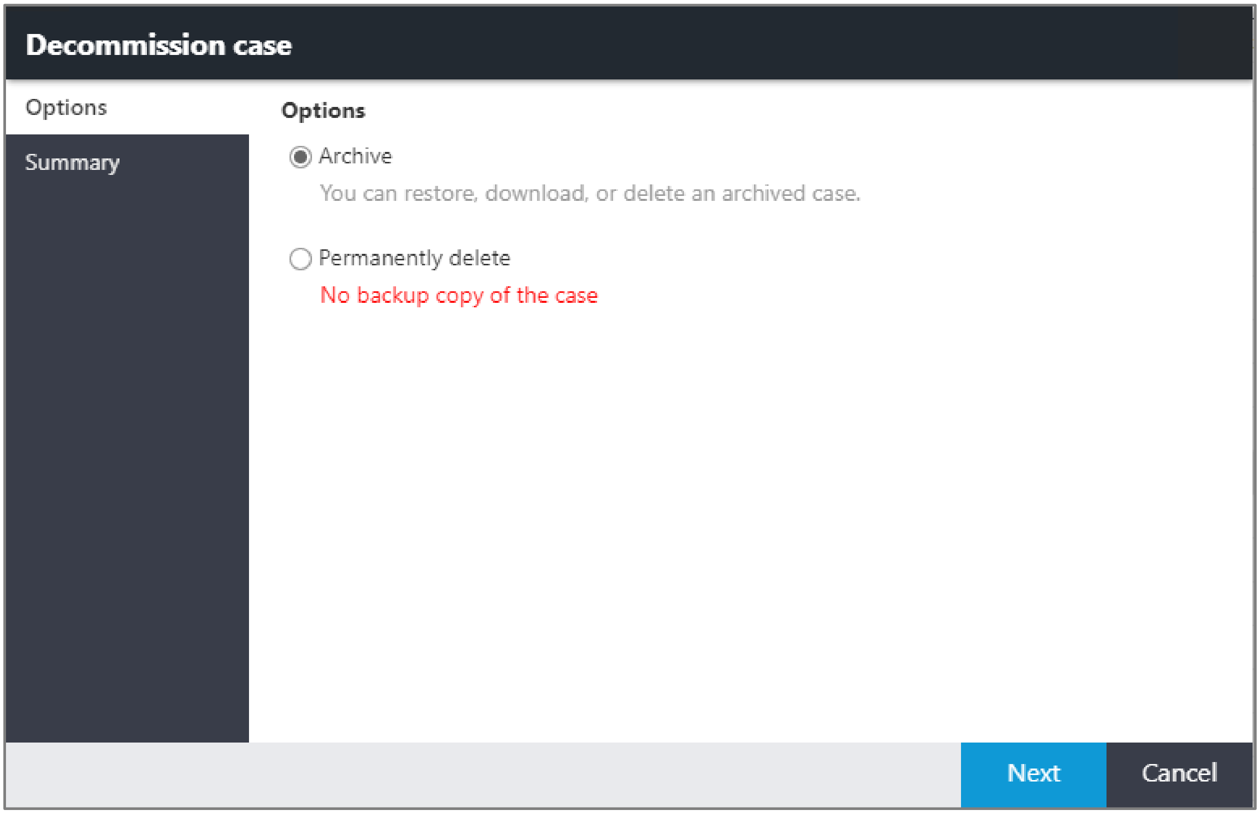
Use the following procedure to decommission and archive a case.

1. On the **Cases** page, select the case you wish to archive.
2. On the **More** menu, select **Decommission**, as shown in the following figure.

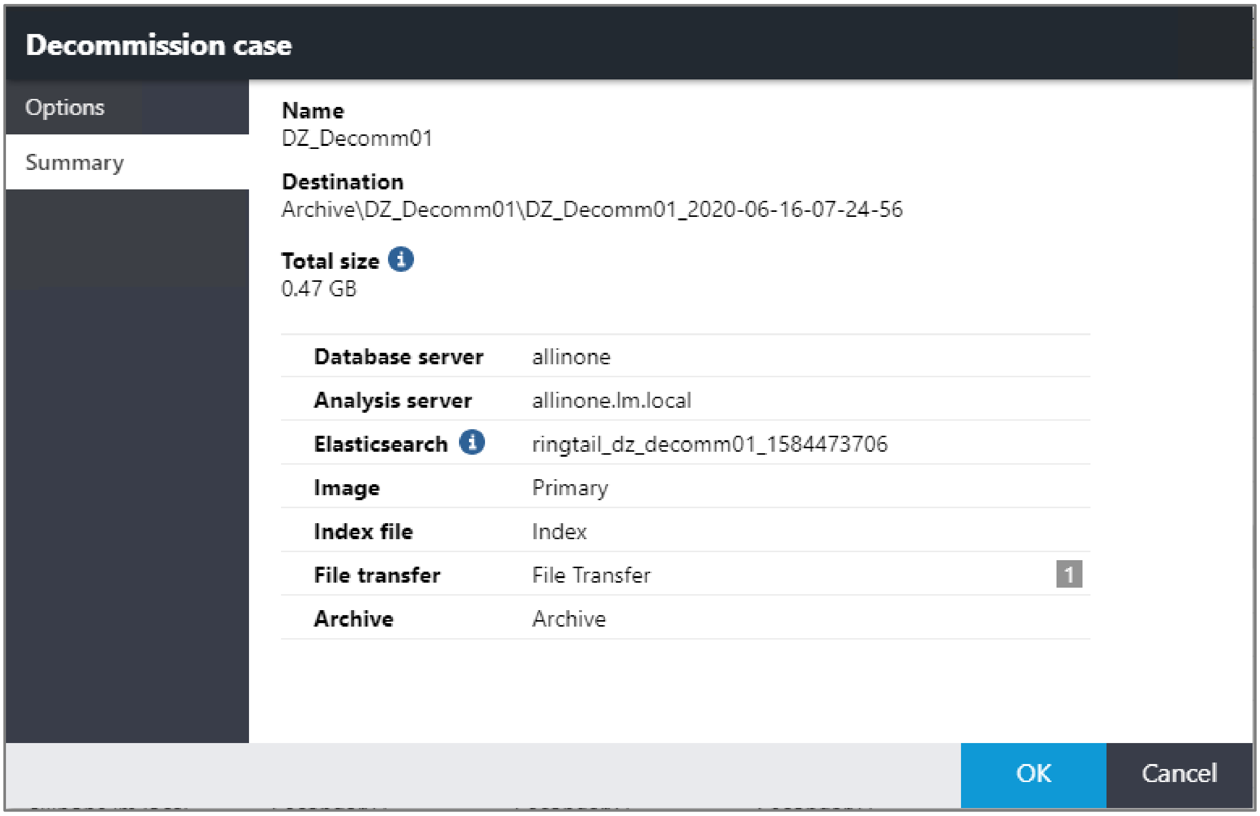


The **Decommission case** window appears, as shown in the following figure.

3. The **Decommission case** dialog box has been changed to a wizard-style window with two pages: **Options** and **Summary**. The **Options** page now includes a choice for **Archive** (selected by default) or **Permanently delete**, which was previously the only option available when decommissioning a case. Select **Archive**, and then click **Next**.

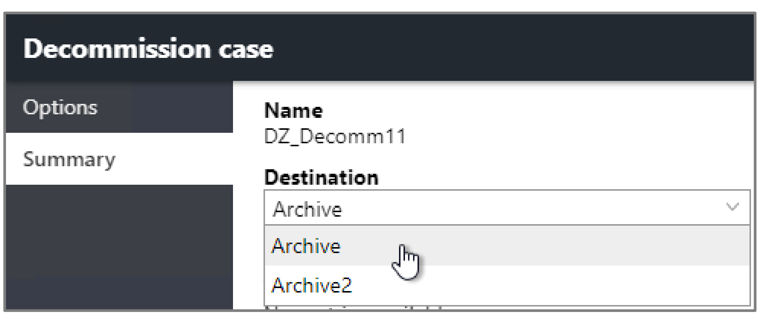

Decommission case
Options
Summary
Options
Archive
You can restore, download, or delete an archived case.
Permanently delete
No backup copy of the case
Next
Cancel

4. The **Summary** page, shown in the following figure, displays the destination folder where the archived case will be stored, the total size of the case to be archived (as captured by the latest case metrics job), and a listing of the database and analysis servers, Elasticsearch index name, and the repositories that are assigned to the case. To archive the case, click **OK**.



Note: If files were archived while the case was live, the folders containing those file archives will remain adjacent to the new folder that is created for the case archive. The previously archived files will not be “re-archived” to the case archive destination folder.

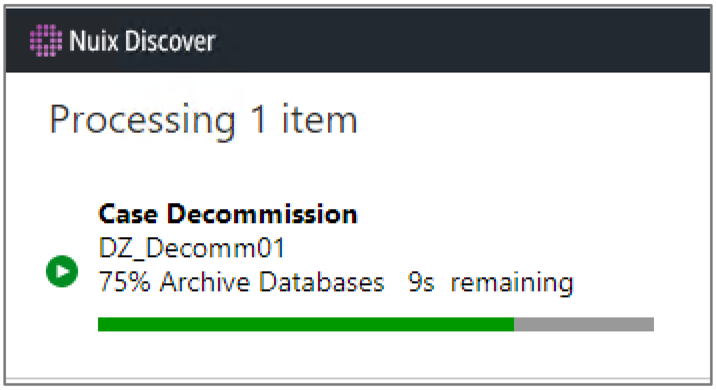
If the case does not have an archive repository currently assigned, the **Destination** field shown in the following figure will display a list of the available archive repositories. Select an archive repository to assign as the destination for the archived case.



Note: When organizations security is enabled for the portal, the archive repository that is assigned to the case must also be assigned to the case’s organization to allow for the case to be archived.

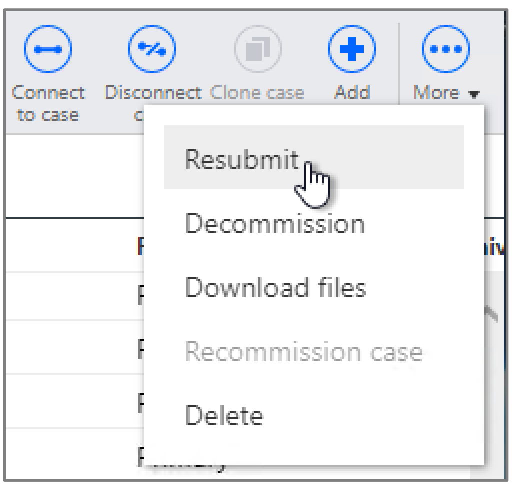
5. After you click **OK**, a **Case Decommission** job will run in RPF and will archive the case. The worker processing window will open and display the progress of the job stages, as shown in the following figure.

   Note: You do not need to keep the worker processing window open while the job is running. You can also monitor the job progress in the **Progress** column for the case row on the **Cases and Servers > Cases** page, or by viewing the job on the **Processing > Jobs** page.

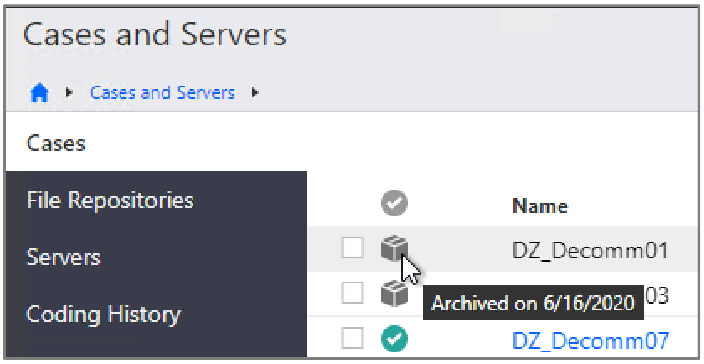
   

   Note: When the job begins, the case will be taken offline and users will no longer be able to access the case. Any scheduled RPF jobs for the case will be removed.

6. If the job fails at any point, the case will appear with a **Failed** status on the **Cases and Servers > Cases** page. You can use the **Resubmit** option to attempt to resume the job. This will restart the job on the stage where it left off. To resubmit the case for decommission, select the case, and on the **More** menu, click **Resubmit**, as shown in the following figure.

After a case is successfully archived, it will appear on the **Cases** page with an **Archived** status, as shown in the following figure.



About archived case files

When you archive a case, Nuix Discover saves a variety of case files. An example of the types of files that are stored for an archived case is shown in the following figure.

The types of files for your archived case include:

- **.bak** files for all three of the case SQL databases.
- **Zip archives** containing all files from the repositories assigned to the case.

> **Note:** Zip file names include the top-level folder name from the repository. An empty .zip file will be created to represent a folder that does not contain any files in the case subfolder. Files are batched into .zip archives that are approximately 2 GB in size. Depending on the total size of files contained in a repository folder, this could result in multiple .zip archives for a top-level folder. In that case, each .zip archive will be named uniquely with a numeric suffix.

- A **.zip archive** containing the coding history Elasticsearch index.
- **.csv** files that contain a file inventory of each top-level folder from each repository. These inventory files are used for the validation stages of the decommission and recommission jobs.

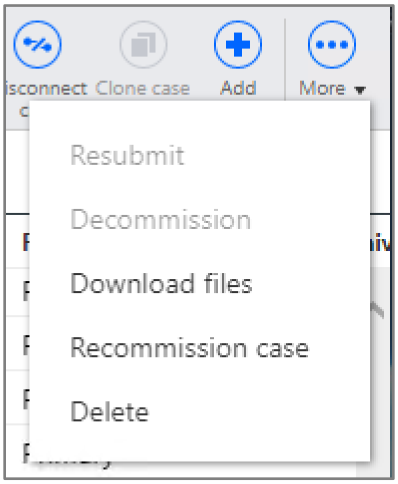
Local Disk (C:) › Archive › DZ_Decomm01 › DZ_Decomm01_2020-06-16-07-24-56 ›

Name	Date modified	Type	Size
DZ_Decomm01.bak	6/16/2020 7:28 AM	BAK File	37,183 KB
DZ_Decomm01_2020-06-16-07-24-56_2004_10340_10926_images.zip	6/16/2020 7:30 AM	Compressed (zipp...	199,051 KB
DZ_Decomm01_2020-06-16-07-24-56_2004_10342_10924_cases.zip	6/16/2020 7:29 AM	Compressed (zipp...	0 KB
DZ_Decomm01_2020-06-16-07-24-56_2005_10341_10925_dtIndexes.zip	6/16/2020 7:29 AM	Compressed (zipp...	33,371 KB
DZ_Decomm01_2020-06-16-07-24-56_2006_10337_10921_ingest_temp.zip	6/16/2020 7:29 AM	Compressed (zipp...	2,521 KB
DZ_Decomm01_2020-06-16-07-24-56_2006_10338_10922_suppressed.zip	6/16/2020 7:29 AM	Compressed (zipp...	34 KB
DZ_Decomm01_2020-06-16-07-24-56_2006_10339_10923_ingest.zip	6/16/2020 7:29 AM	Compressed (zipp...	88,864 KB
DZ_Decomm01_CE.bak	6/16/2020 7:28 AM	BAK File	28,857 KB
DZ_Decomm01_DW.bak	6/16/2020 7:28 AM	BAK File	12,573 KB
file_inventory_2004_cases.csv	6/16/2020 7:27 AM	CSV File	0 KB
file_inventory_2004_dtThesaurus.csv	6/16/2020 7:27 AM	CSV File	0 KB
file_inventory_2004_images.csv	6/16/2020 7:27 AM	CSV File	168 KB
file_inventory_2005_dtThesaurus.csv	6/16/2020 7:27 AM	CSV File	0 KB
file_inventory_2006_dtThesaurus.csv	6/16/2020 7:27 AM	CSV File	0 KB
file_inventory_2006_Import.csv	6/16/2020 7:27 AM	CSV File	0 KB
file_inventory_2006_ingest.csv	6/16/2020 7:27 AM	CSV File	89 KB
file_inventory_2006_ingest_temp.csv	6/16/2020 7:27 AM	CSV File	5 KB
file_inventory_2006_suppressed.csv	6/16/2020 7:27 AM	CSV File	1 KB
ringtail_dz_decomm01_1584473706.zip	6/16/2020 7:28 AM	Compressed (zipp...	85 KB

When you archive a case, you also have three new options on the **More** menu.

The following options are available for an archived case on the **More** menu on the **Cases** page, as shown in the following figure:

- **Download files:** This will download a copy of all files for the archived case.
- **Recommission case:** This will restore the case and all files back to their original locations.
- **Delete:** This will permanently delete the archived case with no backup.

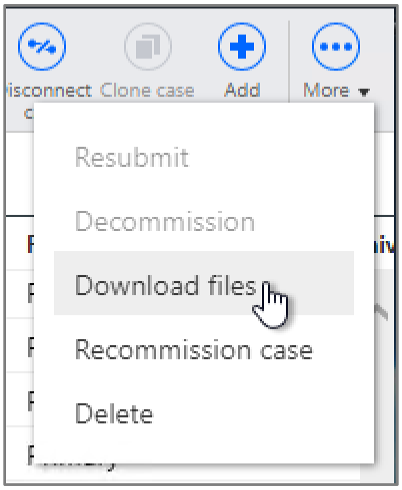


Download case files from an archived case

You can download case files from an archived case and save a copy of those files locally using the **Download files** option on the **More** menu on the **Cases** page.

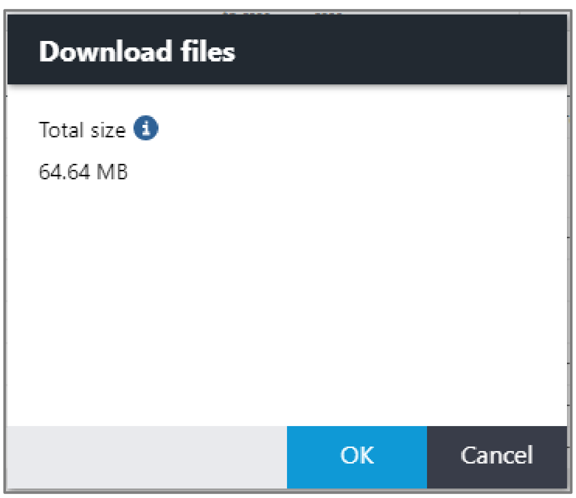
Use the following procedure to download case files from an archived case.

1. On the **Cases** page, select the archived case.
2. On the **More** menu, select **Download files**, as shown in the following figure.



The **Download files** dialog box appears, as shown in the following figure.

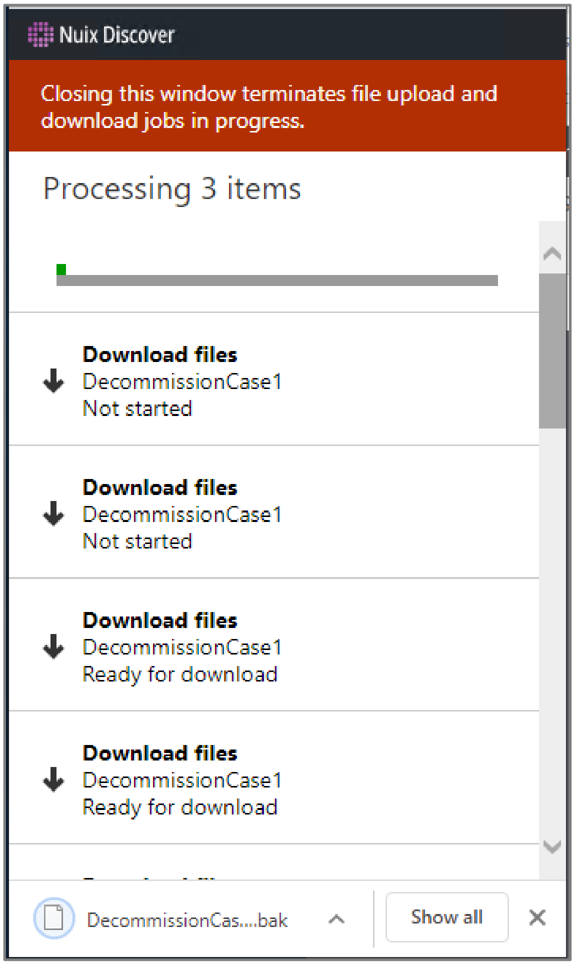
3. In the **Download files** dialog box, you will see the total size of the files for the archived case that will be downloaded. Click **OK**.



The worker processing window appears, as shown in the following figure.

4. The worker processing window displays the status for the files being downloaded. Keep this window open, as all files will be downloaded through this window.

Note: Depending on your browser settings, you may be prompted to allow for multiple files to be downloaded.

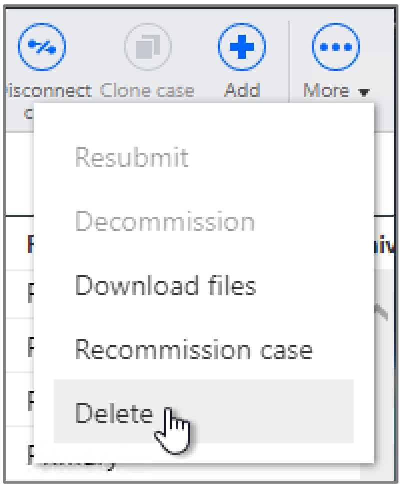

Nuix Discover
Closing this window terminates file upload and download jobs in progress.
Processing 3 items
Download files
DecommissionCase1
Not started
Download files
DecommissionCase1
Not started
Download files
DecommissionCase1
Ready for download
Download files
DecommissionCase1
Ready for download
DecommissionCas....bak
Show all

Delete an archived case

After you decommission and archive a case, you can delete it permanently using the **Delete** option on the **More** menu on the **Cases** page.

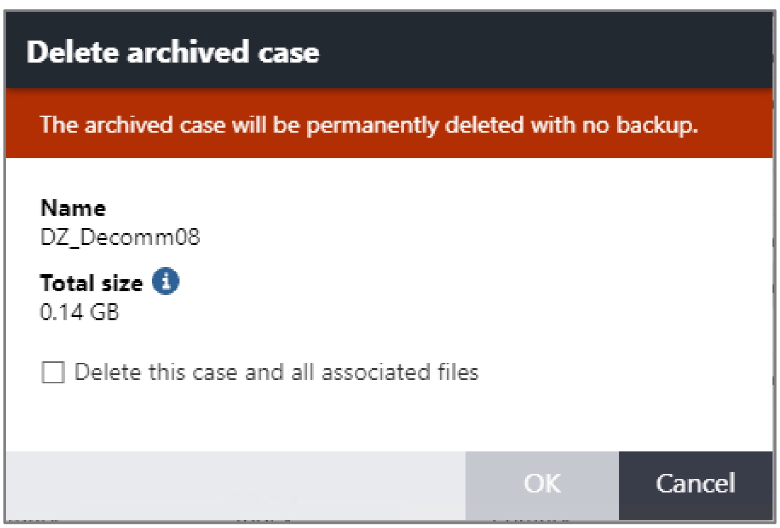
Use the following procedure to delete an archived case.

1. On the **Cases** page, select the archived case.
2. On the **More** menu, select **Delete**, as shown in the following figure.



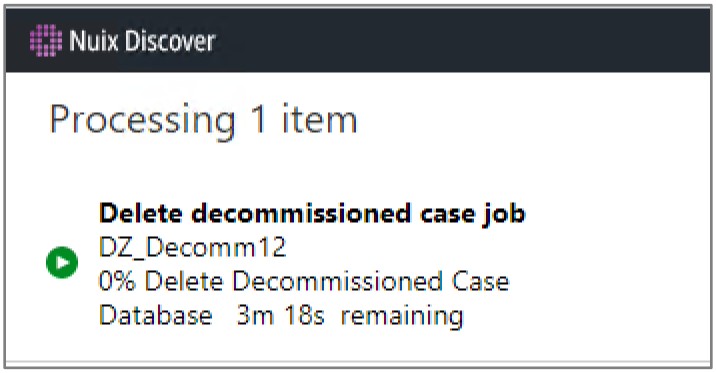
The **Delete archived case** dialog box appears, as shown in the following figure.

3. In the **Delete archived case** dialog box, select the **Delete this case and all associated files** check box to enable the **OK** button, and then click **OK** to permanently delete the archived case with no backup.



4. The **Decommissioned Case Deletion** job will run in RPF and will permanently delete the archived case. The worker processing window opens and displays the progress of the job stages, as shown in the following figure.

Note: You do not have to keep the worker processing window open while the job is running. You can also monitor the job progress in the **Progress** column for the case row on the **Cases and Servers > Cases** page, or by viewing the job on the **Processing > Jobs** page.



5. If the job fails at any point, the case will appear with a **Failed** status on the **Cases and Servers > Cases** page. You can use the **Resubmit** option to attempt to resume the job. This will restart the job on the stage where it left off. To resubmit a case to be deleted, select the case, and from the **More** menu, click **Resubmit**.

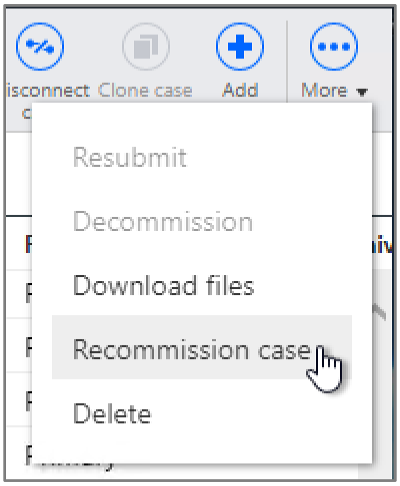
After an archived case is successfully deleted, it will be logged to the **Cases and Servers > Deleted Cases** page.

Recommission a case

You can recommission an archived case by using the **Recommission case** option on the **More** menu on the **Cases** page.

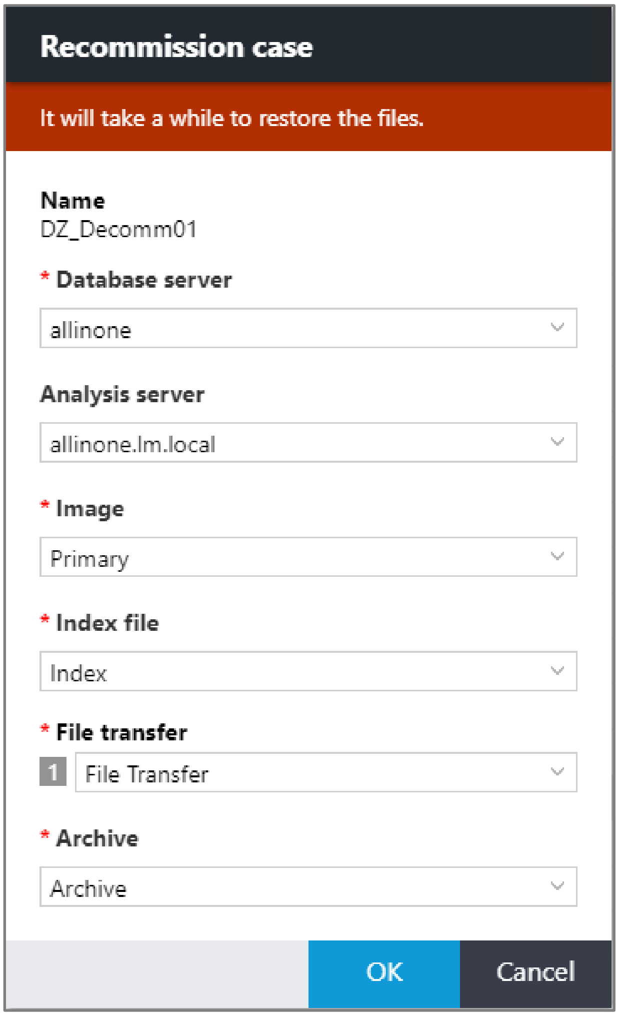
Use the following procedure to recommission an archived case.

1. On the **Cases** page, select the archived case.
2. On the **More** menu, select **Recommission case**, as shown in the following figure.



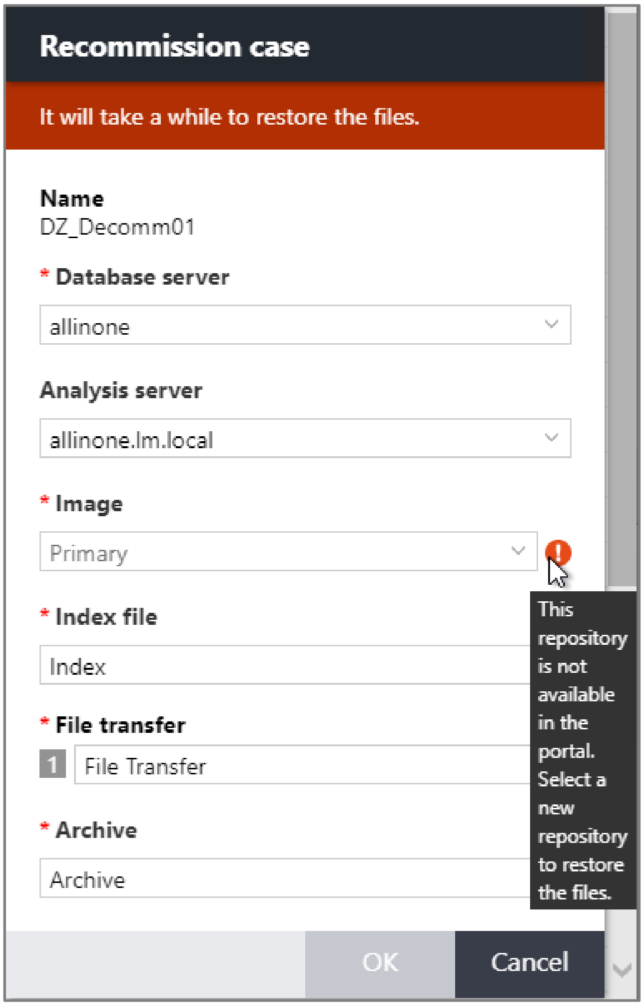
The **Recommission case** dialog box appears, as shown in the following figure.

3. The **Recommission case** dialog box displays the same repositories that were assigned to the case at the time it was archived. To recommission the case, click **OK**.



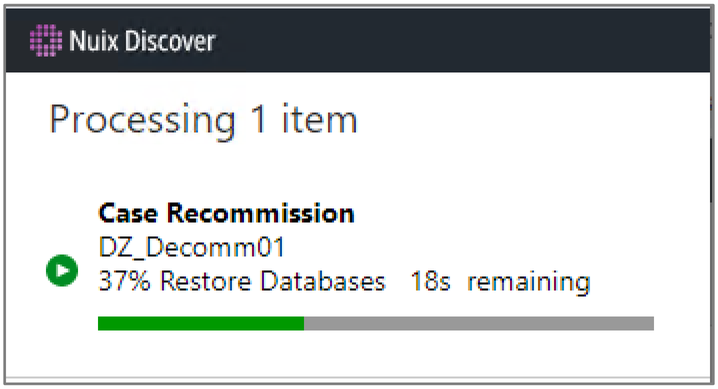
Note: The original servers and repositories that were assigned to the case at the time it was archived are selected by default. The selected Image, Index file, and File transfer repositories will be the destinations for restoring the files. The selected Archive repository is where the recommission job will look for the archived case files to be restored.

Note: If an original repository is no longer available in the portal, a **warning** icon will appear next to that item, as shown in the following figure, and the field will display a list of the available repositories. Select a new repository to assign as the repository type to restore the files to.



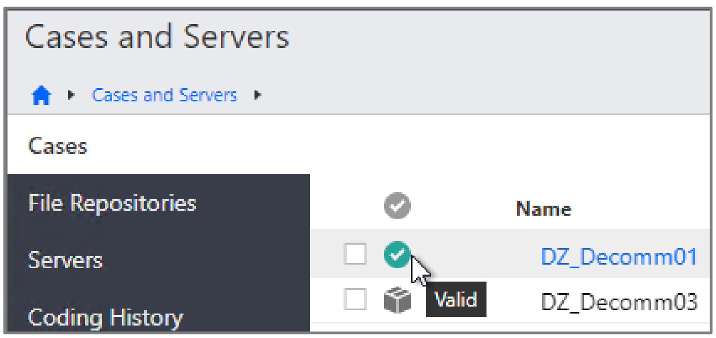
4. A **Case Recommission** job will run in RPF and will restore the case. The worker processing window will open and display the progress of the job stages, as shown in the following figure. You do not have to keep the worker processing window open while the job is running.

Note: You can also monitor the job progress in the **Progress** column for the case row on the **Cases and Servers > Cases** page, or by viewing the job on the **Processing > Jobs** page.



5. If the job fails at any point, the case will appear with a **Failed** status on the **Cases and Servers > Cases** page. You can use the **Resubmit** option to attempt to resume the job. This will restart the job on the stage where it left off. To resubmit a case to be recommissioned, select the case, and on the **More** menu, click **Resubmit**.

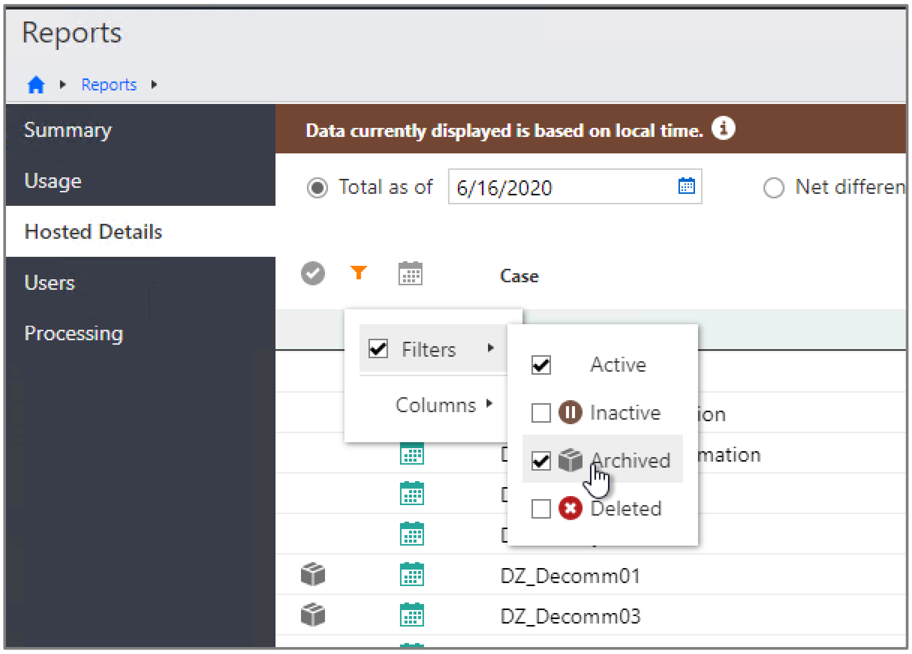
After a case is successfully recommissioned, it will appear on the **Cases** page with a **Valid** status, as shown in the following figure.



Note: The recommission job will attempt to reassign the same users to the case who were assigned at the time the case was archived, assuming those users are still available in the portal.

Report on decommissioned cases

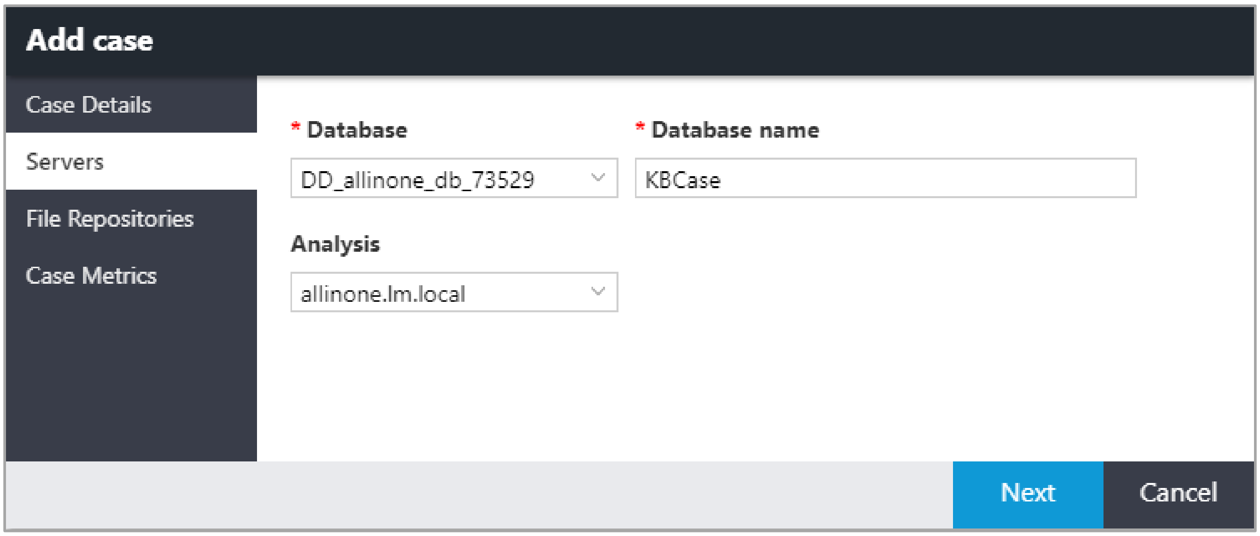
You can see archived cases on the **Reports** > **Hosted Details** page by using the **Status** column filter to show or hide cases with an **Archived** status, as shown in the following figure.



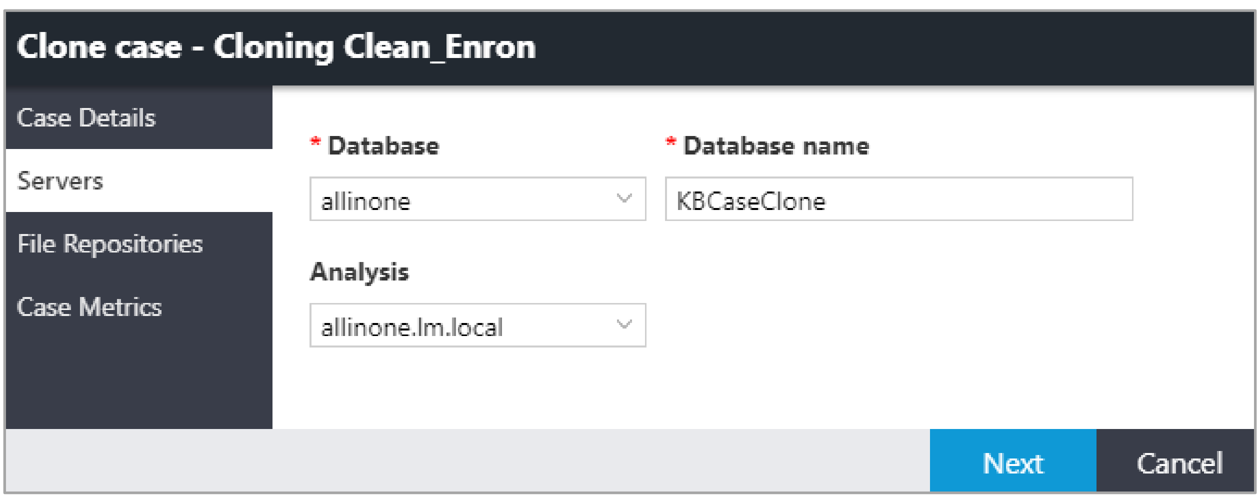
Note: Case metrics are refreshed at the end of the case decommission job so that after a case is successfully archived the total size of the archived case will be represented in the **Archive data (GB)** column on the **Hosted Details** page.

Cases and Servers: Database and Analysis servers prepopulated for Organizations when adding or cloning a case

When you add a new case, the **Database** and **Analysis** servers for that **Organization** are prepopulated on the **Servers** page in the **Add case** window, as shown in the following figure.



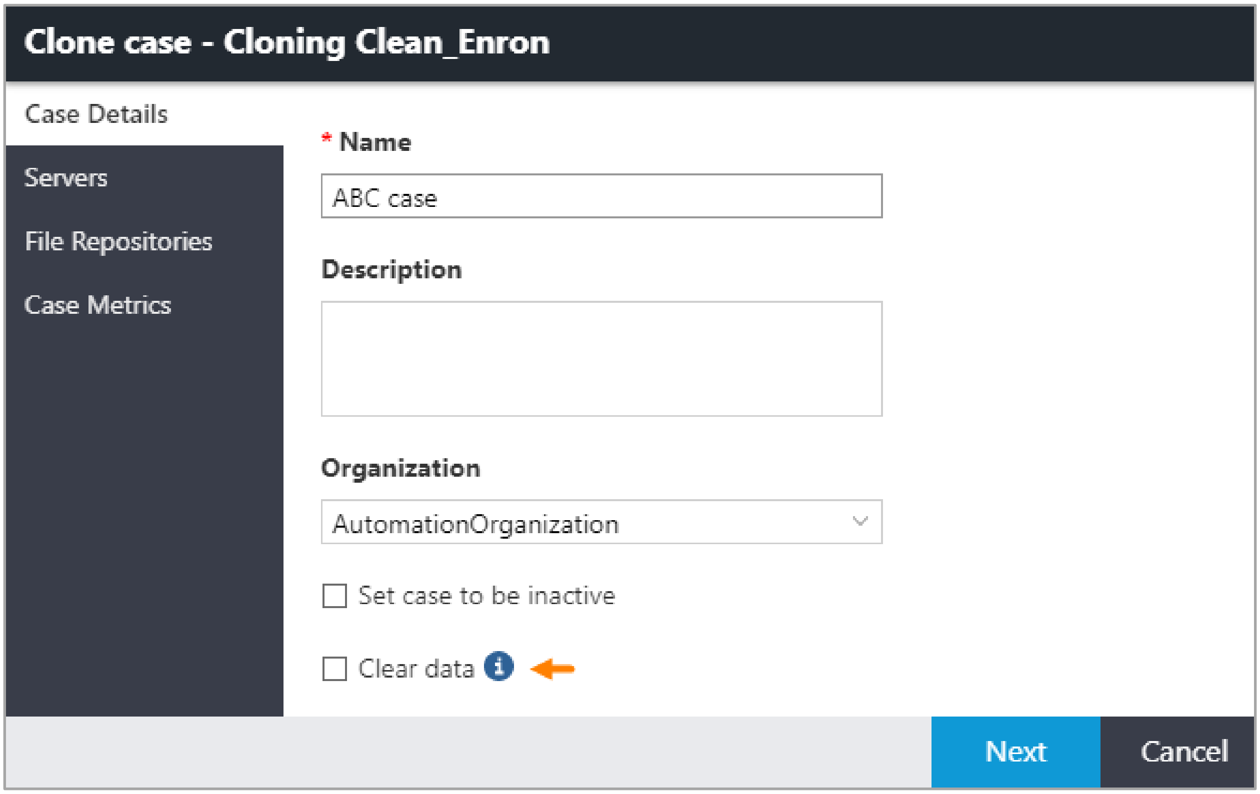
When you clone a case, the **Database** and **Analysis** servers for that **Organization** are prepopulated on the **Servers** page in the **Clone case** window, as shown in the following figure.



Cases and Servers > Clone Case: Audit for coding history is enabled by default for new cases

If the coding history audit feature is enabled for a portal, when you clone a case and leave the **Clear data** option unselected, as shown in the following figure, auditing is now automatically enabled.

The benefit of this is that you do not have to request for the coding history audit feature to be enabled by a system administrator after you create a case.



After you clone a case, a new elastic index is created for the new case, and audit is enabled for coding history.

Case and Servers > Case Options: New case options for the Predictive Coding feature

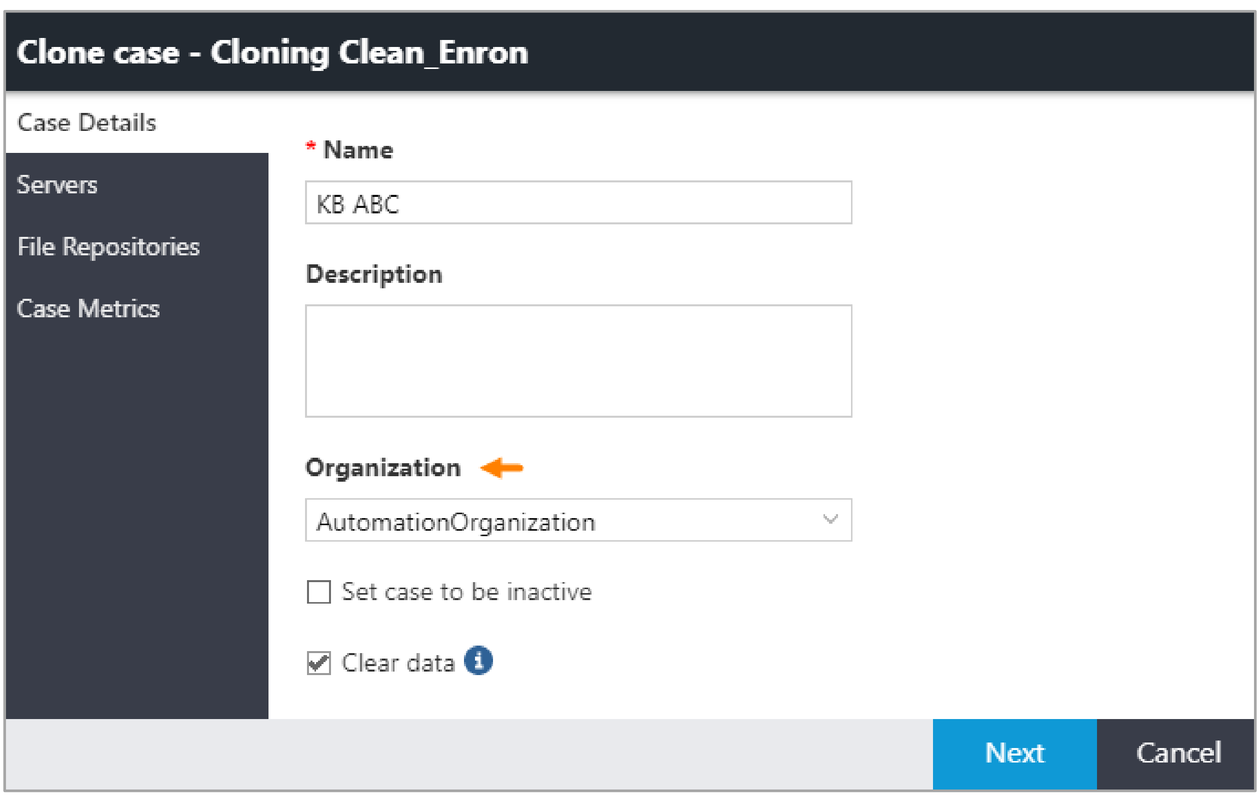
The following case options for Predictive Coding have been added to the **Portal Management > Case and Servers > [Case] > Case Options** page.

Tip: Hover over an infotip to view additional information about an option.

- **Predict Large Document Truncation Length:** Amount of characters to keep at the beginning of a long text after truncation.
  - Default value: 100000000
- **Predict Max Document Size:** Maximum size (in MB) of a document allowed before its contents are truncated.
  - Default value: 500
- **Predict Tokenization Batch Max Size:** Maximum size in bytes of a batch allowed when there is more than one document.
  - Default value: 300

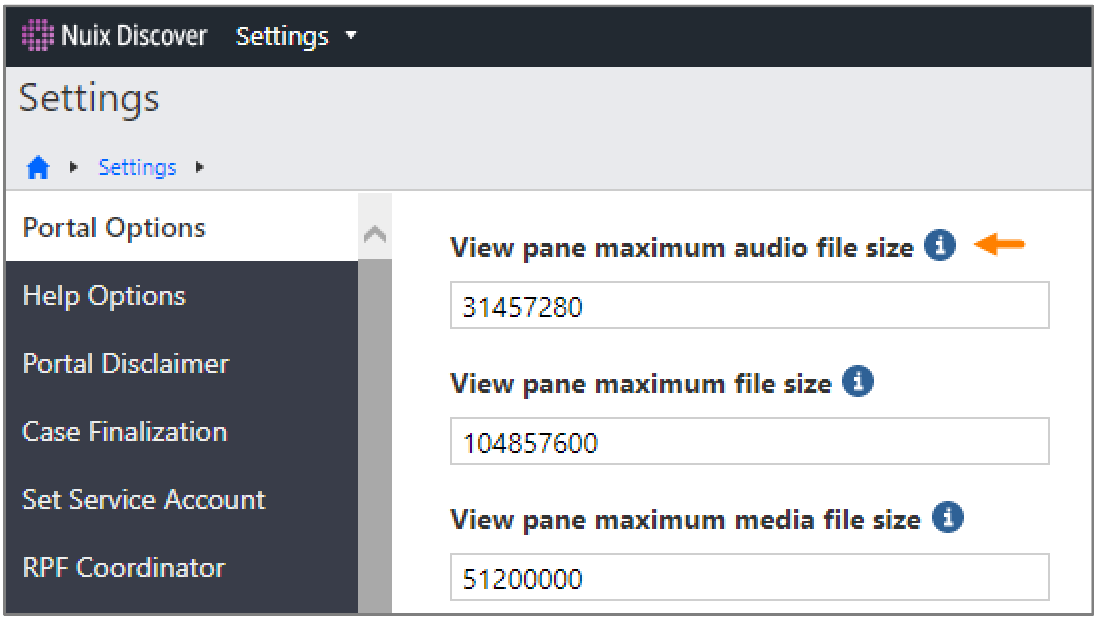
Cases and Servers: Clone a case from one Organization to another Organization

When you clone a case, you can now select a different Organization than the Organization that is currently associated with the case that you are cloning, as shown in the following figure.



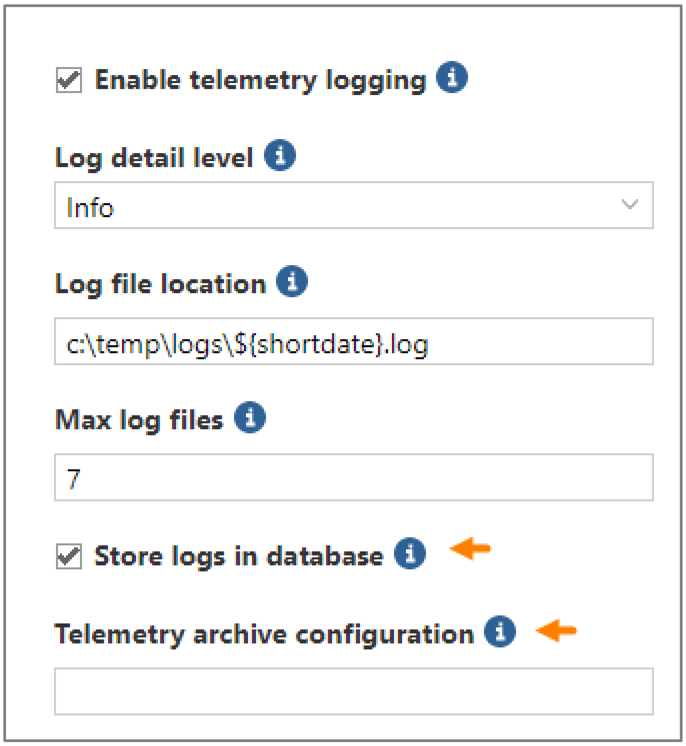
Settings: Portal Options: New setting to limit the size of an audio file in the View pane

A new option named **View pane maximum audio file size** is now available on the **Portal Management** > **Settings** > **Portal Options** page, as shown in the following figure. Use this option to set the maximum file size in bytes when streaming audio files in the **View** pane. This new option, which can be set to a maximum value of 31457280 bytes, addresses IIS performance issues for .wav files.



Settings > Log Options: Change to storing logs in the database

On the **Portal Management > Settings > Log Options** page, shown in the following figure, if you select the **Store logs in database** option, but do not provide any information in the **Telemetry archive configuration** box, the Telemetry Archive job runs once per day and truncates the database table for logs that are older than seven days.



What’s new for system administrators

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

User Administration > Account Settings: Increase the password history maximum setting to 24

On the **Portal Home > User Administration > Account Settings** page, in the **Password history** box, administrators can enter the number of times users must create a unique password before it can be reused. In previous versions, administrators could select 1-20 unique password entries. Now, administrators can select 1-24.

Cases and Servers: Enable Linux/Docker Ingestions option relocated to the portal level

The **Enable Linux/Docker Ingestions** option has been removed from **Case Options** and relocated to **Portal Options**. On the **Portal Home > Settings > Portal Options** page, if you select the **Enable Linux/Docker Ingestions** check box, all cases in the portal will use this setting.

Note: Cases that were configured in previous versions will respect the prior setting. To change the case setting for an existing case, you must use a SQL query.

Organizations: Note about changing case metrics settings

When you change the case metrics settings for an organization in the **Case metrics settings** dialog box on the **Portal Management > Organizations** page, a banner that indicates that the daily metrics are being saved for organizations will now appear at the top of the page while the scheduled jobs are being saved for cases in the organizations, as shown in the following figure. The banner will be removed after all jobs are saved.

Important: You can continue working while the jobs are being saved, but **do not log out of Nuix Discover until you see that the banner is removed**.

The time that it takes for the jobs to finish saving depends on the size of your environment.

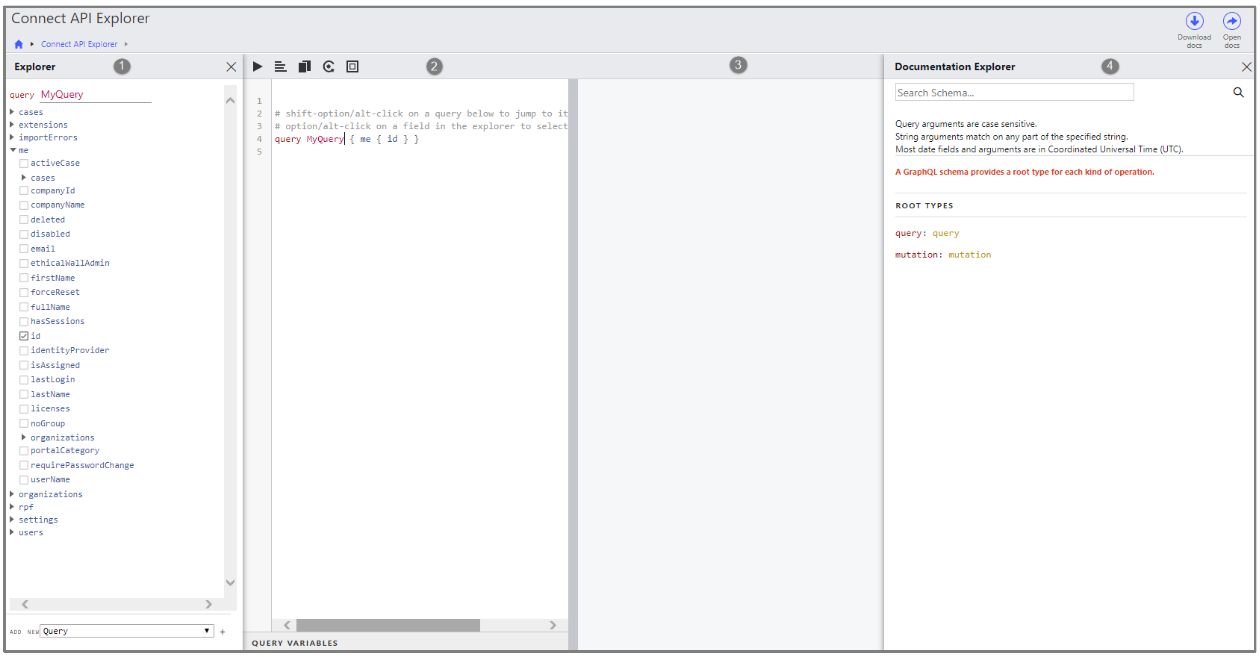
What’s new for developers

The following new features are available to developers.

Connect API Explorer: OneGraph GraphiQL Explorer API query builder

The Connect API Explorer now contains the OneGraph GraphiQL Explorer plug-in. This plug-in is a query builder that assists users, both new and advanced, in quickly and easily generating queries and mutations with a graphical representation of the data fields and objects and helps avoid the frustration of incorrect syntax.

The Connect API Explorer window now contains four panes, as shown in the following figure, and described in the following table.



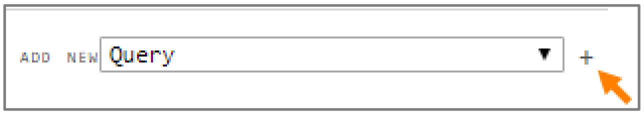
Item	Description
1	**Explorer** pane: New query builder for automated assistance in constructing queries and mutations. **Note:** To close the **Explorer** pane, click the **X** button. To reopen this pane, click the **Show explorer** button in the **Editor** pane.
2	**Editor** pane: Area for constructing, formatting, and running queries and mutations.
3	**Results** pane: Contains query and mutation results.
4	**Documentation Explorer** pane: Documentation details for all query and mutation endpoints and their associated arguments and fields.

Each time you enter the Connect API Explorer, the **Explorer** pane will begin with a default query under the **Me** argument related to data associated with you, the user.

Use the following procedure to manipulate any query or mutation.

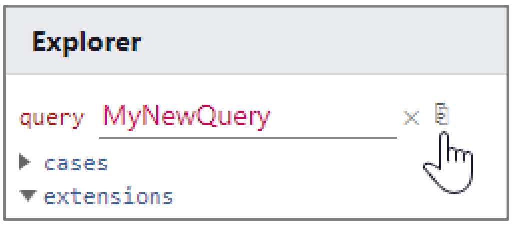
Note: This example creates a basic query filtering on all active cases and sorts them by case name in ascending order.

1. To create a new query or mutation, in the **Add New** field, at the bottom of the **Explorer** pane, select **Query** or **Mutation** from the list, and then click the **+** sign, as shown in the following figure.



   The new blank query or mutation will appear in the **Explorer** and **Editor** panes with a default name.

2. To copy an existing query or mutation, to the right of the Name field, hover over and click the **Copy** button, as shown in the following figure.



   A duplicate copy will appear under the existing queries and mutations in the **Explorer** and **Editor** panes.

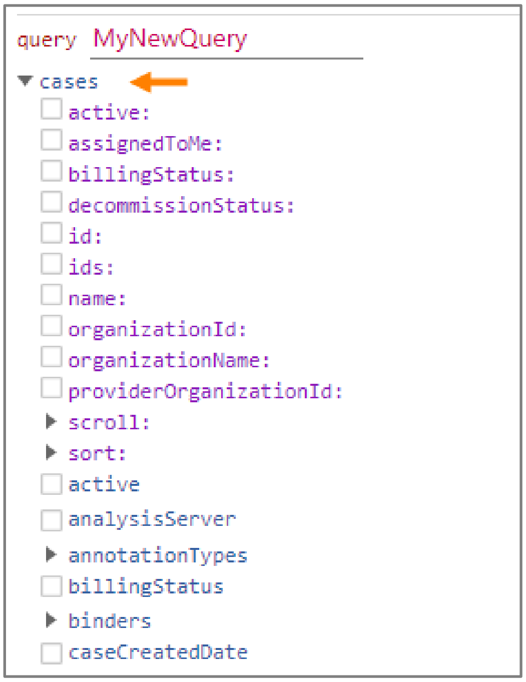
   Note: You can manipulate multiple queries and mutations simultaneously.

3. Enter a unique **Name**.

   The change appears in the **Explorer** and **Editor** panes.

   Note: It is best to give your query or mutation a unique name to help identify their function.

4. In the **Explorer** pane, expand the **cases** list by clicking the expand arrow, as shown in the following figure.



The cases argument is added to the **Editor** pane with the proper syntax.

Note: Filter fields appear in purple and are used for filtering the returned data by a specified value you enter. Fields that appear in blue are used for returning any data value within that field.

Important: If you close an expanded list in the **Explorer** pane, and already have several fields and filters selected, closing the list will delete the selections from the query or mutation. However, those selections are cached, and by expanding the list again, the selected fields and filter data will reappear.

5. Select the check boxes for the **id** and **name** fields shown in blue text, shown in the following figure in step 7.

   The fields appear in the **Editor** pane in the proper location and surrounded by the correct syntax.

   Note: If you manually enter these fields in the **Editor** pane, the check boxes are automatically selected in the **Explorer** pane.

6. Select the check box for the **active** field shown in purple text, shown in the following figure in step 7, and then select **true**.

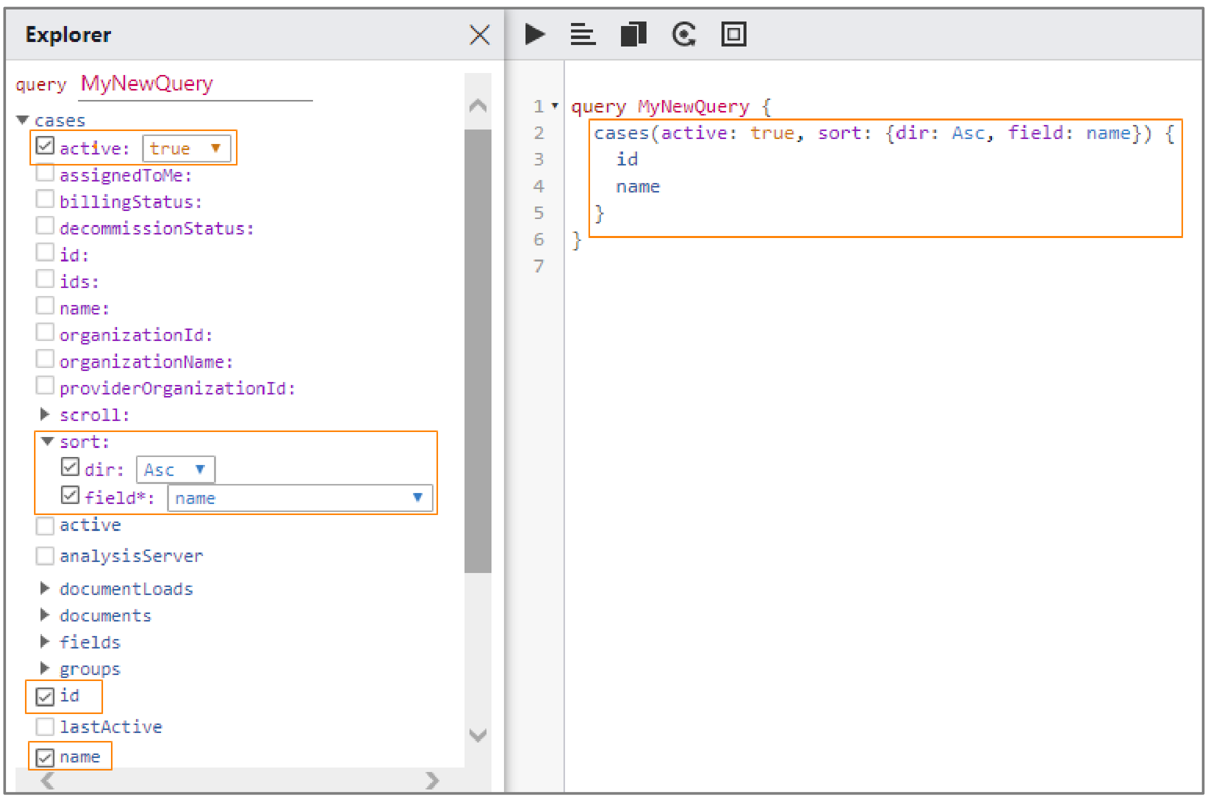
   Note: When filtering with multiple values, such as multiple IDs, the builder does not support arrays. You must enter the multiple filtering values manually in the **Editor** pane.

7. Expand the **sort** field shown in purple text, and then do the following.

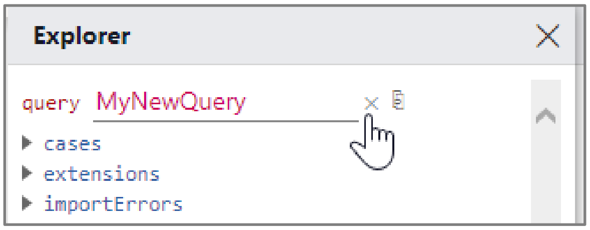
   a. Select the check box for the **dir** field, and then select **Asc**.
   b. Select the check box for the **field*** field, and then select **name**.

   Important: The asterisk (*) following a field name indicates a required field. If selected, this field must contain a data value to filter on.

   The query now contains all of the selected fields and filter options, as shown in the following figure.



8. To delete the query or mutation and start over, hover over the name in the **Explorer** pane, and then click the **X** button, as shown in the following figure.



The query or mutation is deleted from both the **Explorer** and **Editor** panes.

9. To run a query or mutation, in the **Editor** pane, click the **Execute query** button.

Note: If you have multiple queries and mutations, a list will appear where you can select one for execution. However, all queries and mutations must be valid to run that selection successfully.

The results will appear in the **Results** pane.

Connect API Explorer: Identify archived cases using the decommissionStatus field

In the Connect API Explorer, the `caseDecommissionStatusEnumType` filter now includes the status **Archived** as a value by using the `decommissionStatus` field.

Sample query:

```
query {
  cases (decommissionStatus: Archived) {
    name
    caseDecommissionedBy
    caseDecommissionedDate
    decommissionStatus
  }
}
```

Sample query results:


```
{
  "data": {
    "cases": [
      {
        "name": "Acme",
        "caseDecommissionedBy": "Doe, John",
        "caseDecommissionedDate": "2020-06-15T18:35:55.743Z",
        "decommissionStatus": "Archived"
      }
    ]
  }
}
```


Connect API Explorer: Search coding history values using the PreviousValueEverWas operator

The operator `PreviousValueEverWas` is now available in the API for searching on values in coding history.

Sample mutation:

```
mutation {
  searchRun (caseId: 2, input: {
    include: MatchingItems,
    renditions: false,
    singleQuery: {
      field: "Document ID",
      operator: PreviousValueEverWas,
      value: "A"
    }
  }) {
    id
    label
    count
    dateRun
    entityId
    items {
      id
      itemId
    }
  }
}
```

Sample mutation results:


```
{
  "data": {
    "searchRun": {
      "id": 742,
      "label": "--\"Document ID\" previous value ever was \"A\"",
      "count": 0,
      "dateRun": "2020-06-19T14:18:53.027Z",
      "entityId": 1,
      "items": []
    }
  }
}
```


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.

Note: For additional information about the Microsoft Lifecycle Policy, go to https://support.microsoft.com/en-us/lifecycle/search.

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 10.4 quarterly release to on-premises clients, the following Microsoft server products are supported:

- Microsoft Windows Server Operating System
  - Microsoft Windows Server 2012 R2

    Note: (End-of-support notice) Microsoft Windows Server 2012 R2 will no longer be supported as of the 10.5.011 release in January of 2020.

  - Microsoft Windows Server 2016
  - Microsoft Windows Server 2019
- Microsoft SQL Server
  - Microsoft SQL Server 2016 SP2
  - Microsoft SQL Server 2017 CU21
  - Microsoft SQL Server 2019 CU6

Note: For detailed information about client computer requirements, see the *Nuix Discover 10.4 Client Computer Requirements* guide. For detailed system and hardware requirements, see the *Nuix Discover 10.4 Hardware and System Requirements* guide.

Login Service version 2.3.15 now includes an installer

This installer is intended for deployment on Windows servers. New versions of Nuix Discover will continue to be compatible with Login Service version 2.2.21, so you can upgrade at your convenience. The **Login Service** can be installed using the Nuix Discover Deployer version 2.5.94 and higher.

Ingestions: NIST list updated - June 2020

The Ingestions feature now uses an updated version of this list, released in June 2020. For more information, go to https://www.nist.gov/itl/ssd/software-quality-group/national-software-reference-library-nsrl/nsrl-download/current-rds

Ingestions: Upgrade to the Nuix Engine 8.6.3

Ingestions now uses the Nuix Workstation 8.6.3 processing engine.

Disclaimers