Nuix Discover 100.0 Quarterly Release Notes (OP)

This document provides an overview of the new features introduced in this quarterly release of Nuix Discover® to on-premises (OP) clients. This release covers the features in versions 100.0.000 - 100.0.005.

What’s new for end users

The following updated features are available to end users.

User Interface modernization

Nuix Neo Discover has a new, modern interface. The new user experience is extended across the entire Nuix Neo platform, providing a unified experience for all users. The refreshed interface features a cleaner, more flexible design that puts users' data and insights front and center. The new design features rounded corners, updated iconography, and a refined visual layout.

Generative AI for Review

Adoption of generative AI is no longer an emerging trend, but an operational necessity across the entire eDiscovery market, especially as it relates to legal document review, and specifically in the early stages of the review process. Due to the increasing volumes and data complexity, it is very time consuming for the review team to have to review all of the documents manually. Manual review of large volumes of documents is also error prone. A generative AI-based review leverages large language models (LLMs) to review and categorize each document based on human prompting. Starting with a small subset of documents, precision of the predictions can be increased with prompt refinement and iteration.

In conjunction with review by human reviewers, you can submit documents to be reviewed by AI. The AI review process comprises the following steps:

- Add a new AI project
- Create a prompt for AI review
- Analyze the chosen set of documents
- Refine your prompt
- Reanalyze the chosen set of documents
- Analyze another sample of documents for additional confirmation (optional)
- Refine your prompt, if necessary
- Analyze the full set of documents for review, as desired

You can refine your prompt multiple times to achieve the precise prompt that you need.

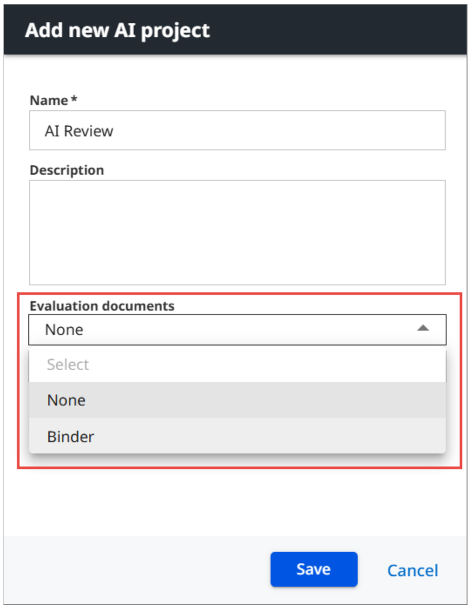
Add a new AI Project

To add a new AI project:

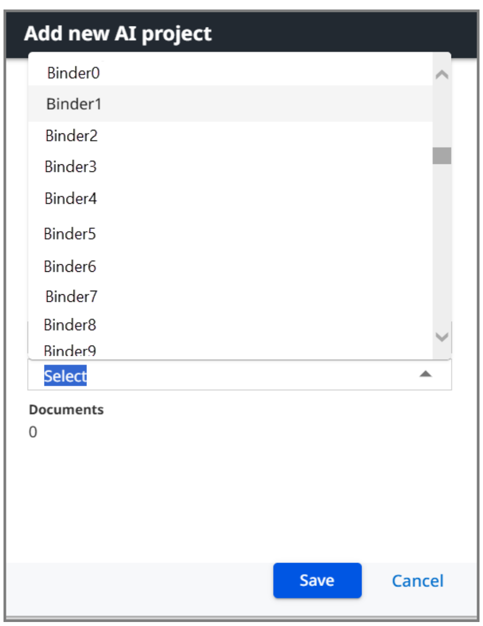
1. On the **Case Home > Analysis > AI Projects** page, click **Add**.

2. In the **Add new AI project** window, enter the name of your AI project

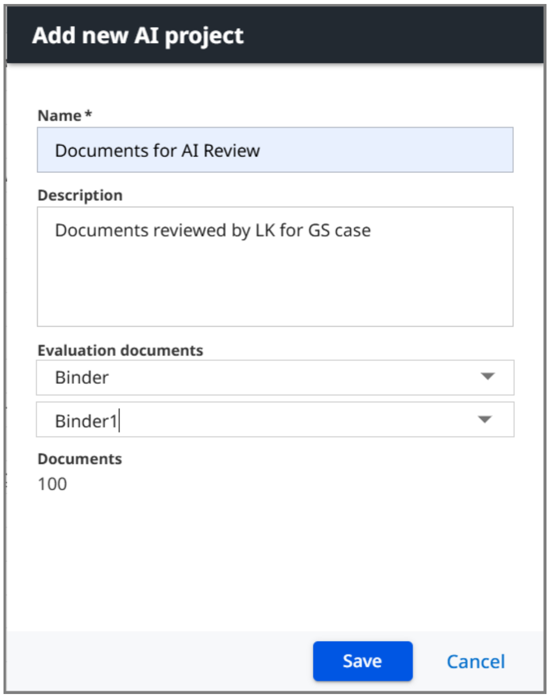
3. Optionally, add a description of the project.
4. Optionally, choose an evaluation set. This is the set of documents you will use to determine the effectiveness of your prompt before analyzing a larger set of documents. While this is optional, selecting documents that have been manually reviewed by a subject matter expert for comparison to the returned AI scores is recommended and may help prompt improvement and performance.



5. If you selected **Binder** under **Evaluation documents**, choose a binder containing the documents you want to use to evaluate your prompt. These documents are your **Evaluation Set**. All prompts created in a given project use the same evaluation set. If you wish to use a different evaluation set, create a separate project.



6. Once you have selected a binder, the **Documents** field displays the number of documents in the set you selected. Documents can be added to or removed from the binder at any time.



7. Click **Save**.

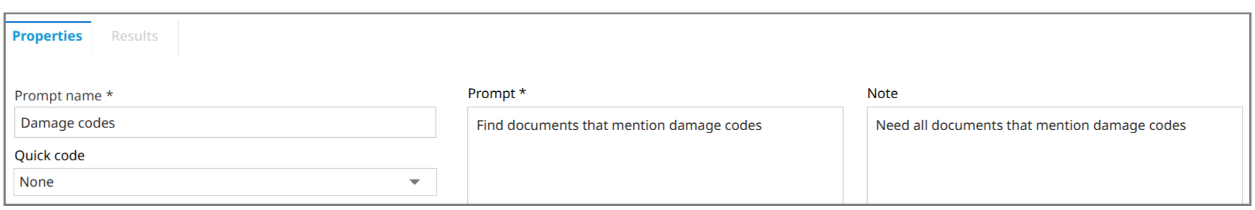
Create a Prompt

Once you have defined your AI Project, you must create a prompt for the AI to use in its analysis of the documents in your evaluation set. Crafting effective prompts is essential to guide the Generative AI models to get accurate and relevant results. After creating a new project, you are directed to create a new prompt.

To create a prompt:

1. In the **Prompt Name** field, enter a name for your prompt.
2. In the **Prompt** field, enter the text of your prompt. You can write this prompt in conversational language.
3. Optionally, enter a note in the **Note** field to record information about your prompt.

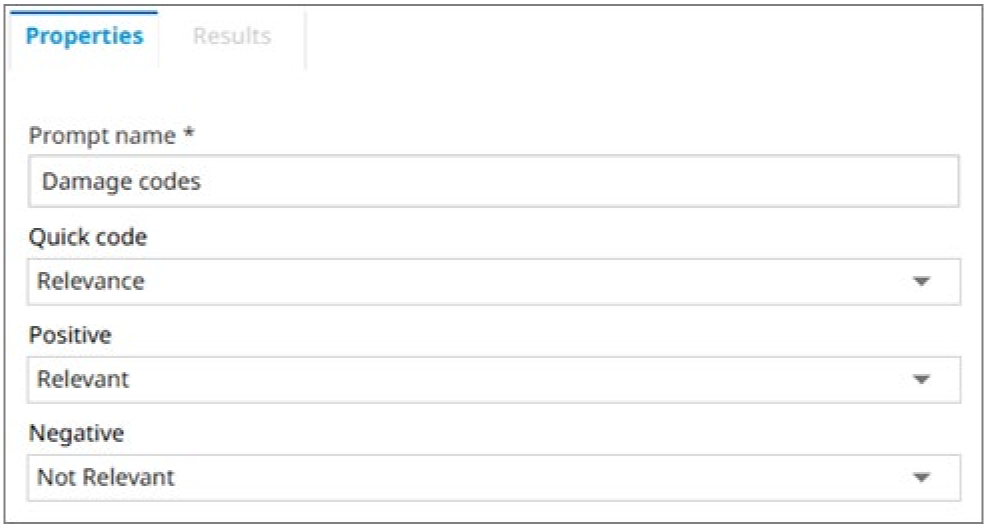
Note: Information in the **Note** field is for reference only and does not affect the prompt.



4. Optionally, you can select a quick code value that a human reviewer has coded for the documents in your evaluation set. This information is not analyzed by AI but will be used to help identify conflicts between human review and AI analysis.

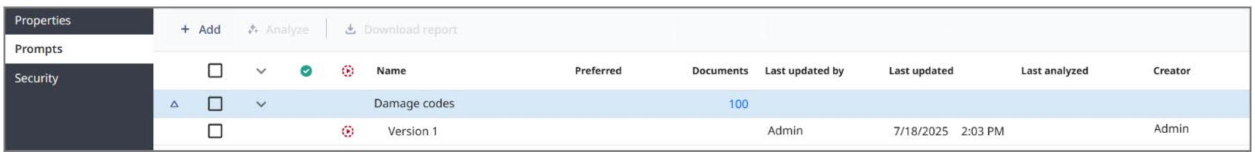
Note: Your case administrator or review lead configures the available quick codes.

5. If you select a quick code value, associate appropriate **Positive** and **Negative** values from your quick code to your prompt. For example, Relevant as positive and Not Relevant as negative.



6. Click **Save**.

Your initial prompt is saved as Version 1.



The icon indicates that the prompt version has not been analyzed.

The **Documents** column shows the number of documents in your evaluation set.

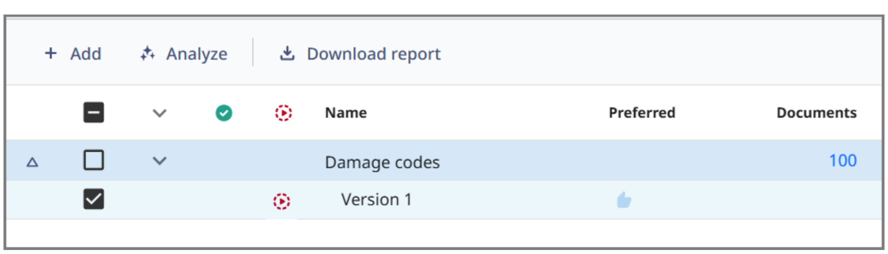
Create additional prompts for the same AI project by clicking **Add** and repeating the creation process. Clicking **Add** automatically directs you to a blank prompt in the prompt details pane.

Submit the Evaluation Set for AI Analysis

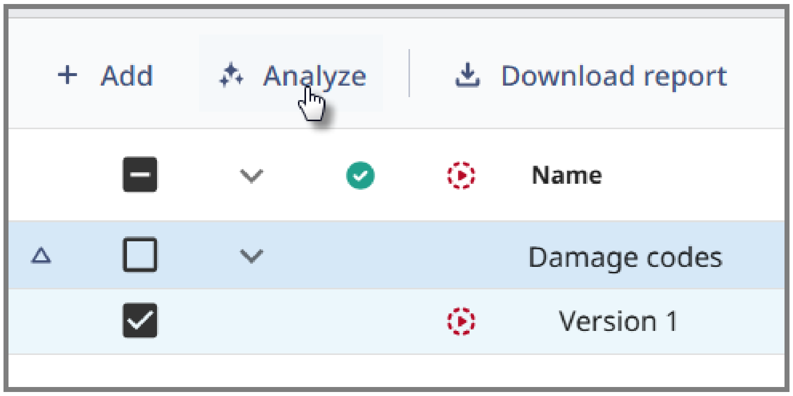
Once you are satisfied with your prompt, you must submit the prompt and your evaluation set for analysis by the generative AI service. Please note that any documents submitted for AI analysis must have previously been submitted for text extraction. Documents without extracted text will be excluded from AI analysis.

To analyze documents:

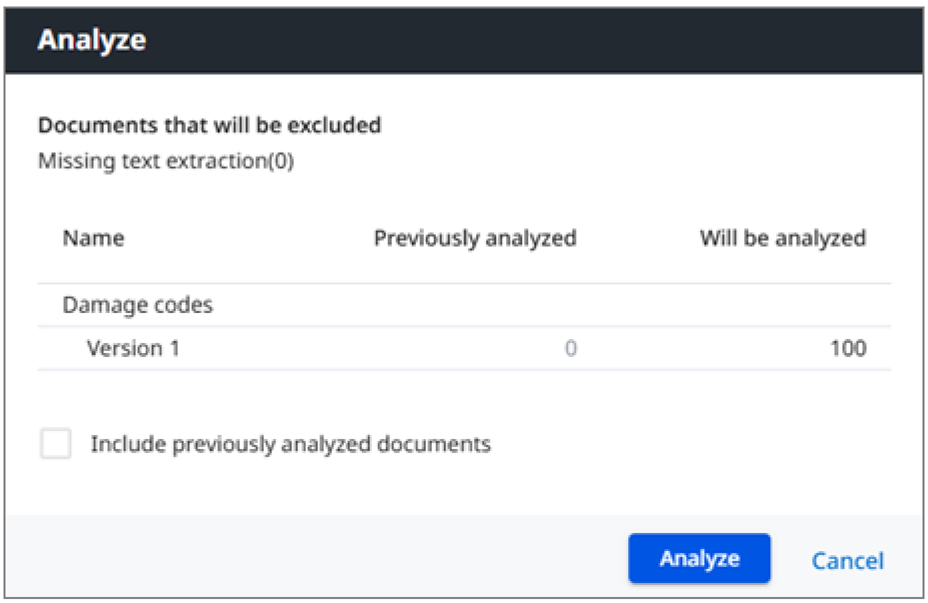
1. Check the box next to the prompt version you want to analyze.



2. Click **Analyze** at the top of the screen.

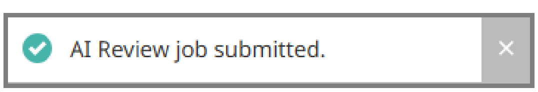


The **Analyze** window opens.

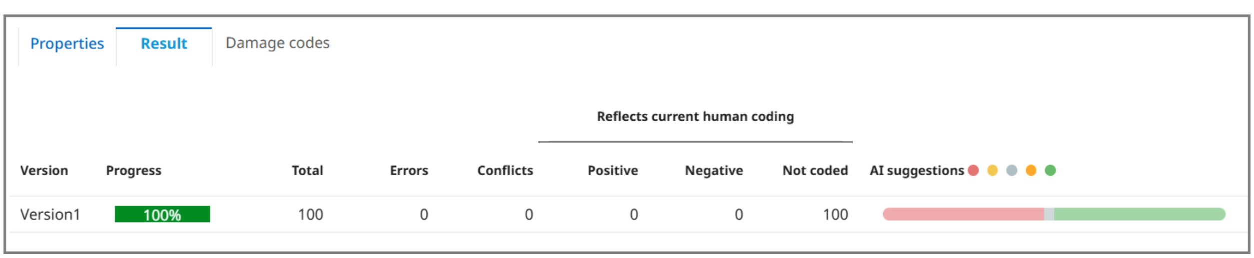


3. To include documents previously analyzed by the selected prompt version, click **Include previously analyzed documents**. When selected, all documents in your evaluation set that were previously analyzed for the selected prompt will be re-submitted for AI analysis.
4. Click **Analyze**.

   A message appears indicating that the AI Review job was submitted.



The results of the prompt version analysis appear in the **Result** tab.



- The **Errors** column returns a count of documents that failed to complete analysis.

- The **Conflicts** column returns a count of documents where the AI suggestion did not match the quick code field coding. This will always be 0 if no quick code field was configured.
- The **Positive**, **Negative**, and **Not coded** columns provide a visual reference for the human coding on the documents, if a quick code was configured and documents were coded to the field.

The **AI suggestions** field gives a color-coded analysis of the relevance of the documents in the evaluation set. The colors represent the following values:

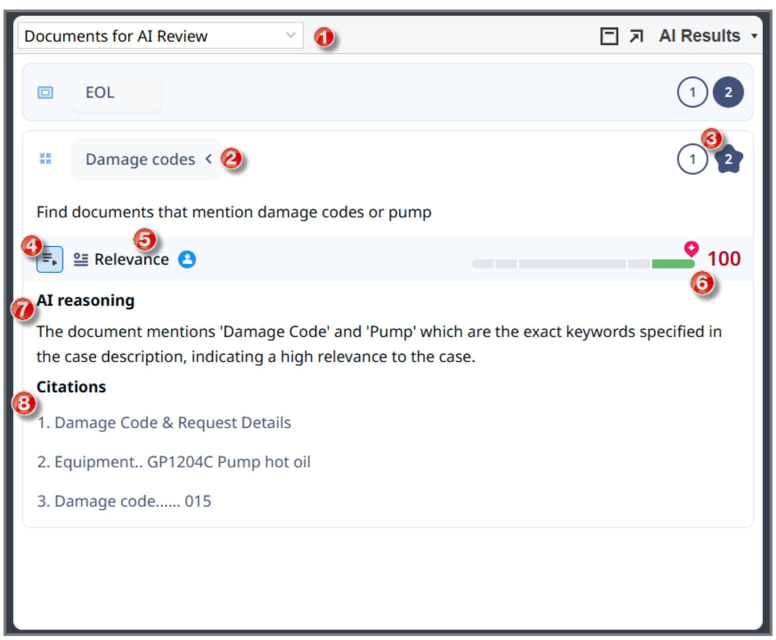
- **Red**: AI highly likely not relevant
- **Yellow**: AI potentially not relevant
- **Gray**: AI not sure
- **Orange**: AI potentially relevant
- **Green**: AI highly likely relevant

Note: Prompt-level results display aggregated information for each version. Click individual versions to view historical results by version.

View AI Results on the Documents Page

Click the number in the **Documents** column of your prompt to view the results of the AI analysis in the **AI Results** pane on the **Documents** page. The **AI Results** pane displays the following information:

1. AI project name
2. Prompt name
3. **Prompt version:** The currently displayed version is highlighted in blue; click the numbers to switch versions. The Preferred version appears as a star icon.
4. **View AI results in List pane** button
5. Quick code field name and quick code coding, if applicable
6. AI's relevance score
7. **AI reasoning:** AI's explanation for the score it chose
8. **Citations:** Citations in the document the AI has provided to support its reasoning and score. Citations highlight in the **Formatted** and **Unformatted** content viewers.

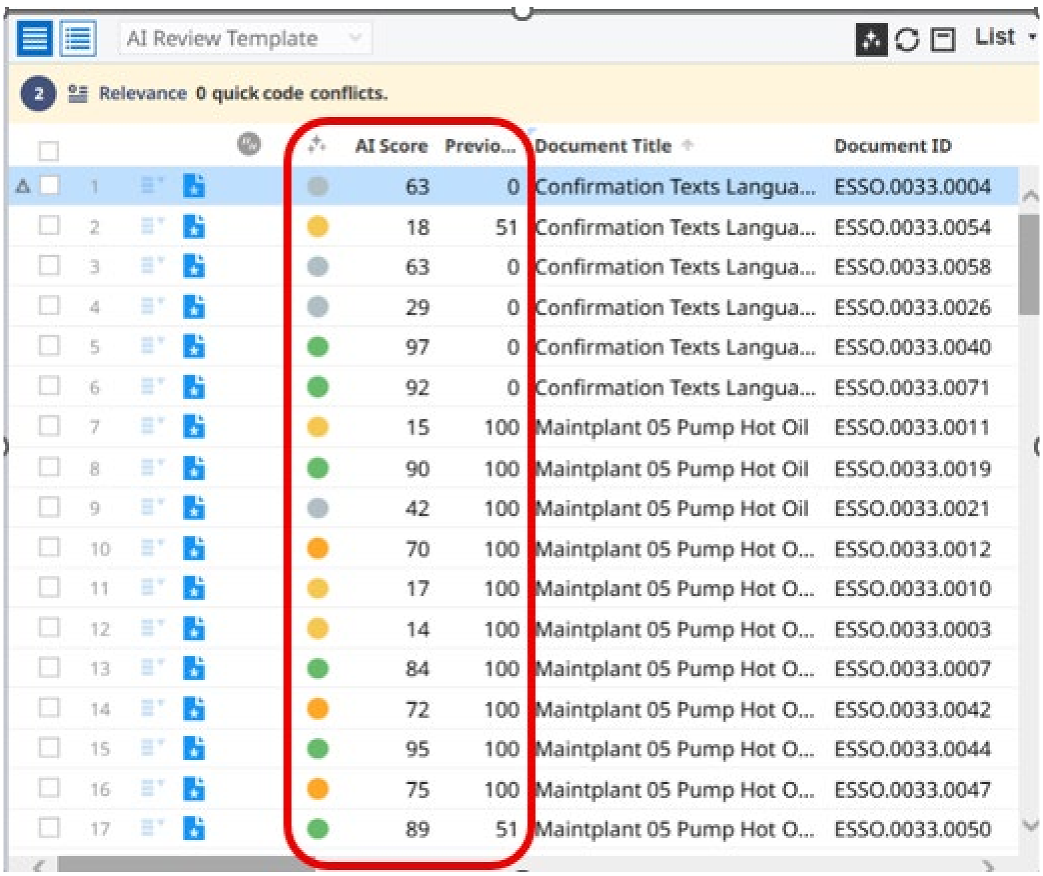


Click **Collapse prompt result** to collapse the prompt result area. Click **Expand prompt result** to display the prompt result area.

Click **View AI results in List pane** to display the AI related fields as columns in the **List** pane. Three additional columns appear in the List pane for AI Review:

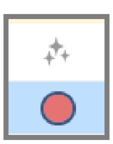
- **AI result**, which appears as a colored dot
- **AI score**, on a scale of 1–100 for the current prompt version
- **Previous AI score**, for the prompt version run prior to the current version.

Note: This column only appears in the **List** pane when selecting a version 2 or subsequent version.



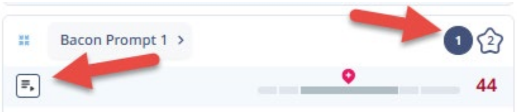
	AI Score	Previo...	Document Title	Document ID
1	63	0	Confirmation Texts Langua...	ESSO.0033.0004
2	18	51	Confirmation Texts Langua...	ESSO.0033.0054
3	63	0	Confirmation Texts Langua...	ESSO.0033.0058
4	29	0	Confirmation Texts Langua...	ESSO.0033.0026
5	97	0	Confirmation Texts Langua...	ESSO.0033.0040
6	92	0	Confirmation Texts Langua...	ESSO.0033.0071
7	15	100	Maintplant 05 Pump Hot Oil	ESSO.0033.0011
8	90	100	Maintplant 05 Pump Hot Oil	ESSO.0033.0019
9	42	100	Maintplant 05 Pump Hot Oil	ESSO.0033.0021
10	70	100	Maintplant 05 Pump Hot O...	ESSO.0033.0012
11	17	100	Maintplant 05 Pump Hot O...	ESSO.0033.0010
12	14	100	Maintplant 05 Pump Hot O...	ESSO.0033.0003
13	84	100	Maintplant 05 Pump Hot O...	ESSO.0033.0007
14	72	100	Maintplant 05 Pump Hot O...	ESSO.0033.0042
15	95	100	Maintplant 05 Pump Hot O...	ESSO.0033.0044
16	75	100	Maintplant 05 Pump Hot O...	ESSO.0033.0047
17	89	51	Maintplant 05 Pump Hot O...	ESSO.0033.0050

If there are conflicts between the human reviewer's analysis of a document's relevance and the AI's analysis of the same document's relevance, the color indicating the relevance value is surrounded by a dark border.



If there are conflicts, the word **Conflicts** is a link that will automatically select the conflicts and switch the view to the working list. You can switch from the conflicts working list to the full list as you would in any results set.

The blue shading on the **View AI results in List pane** button indicates the prompt and version results displayed in the List pane. Change this by clicking the number of the version you wish to view and then clicking **View AI results in List pane**. This refreshes the page and displays the chosen version.



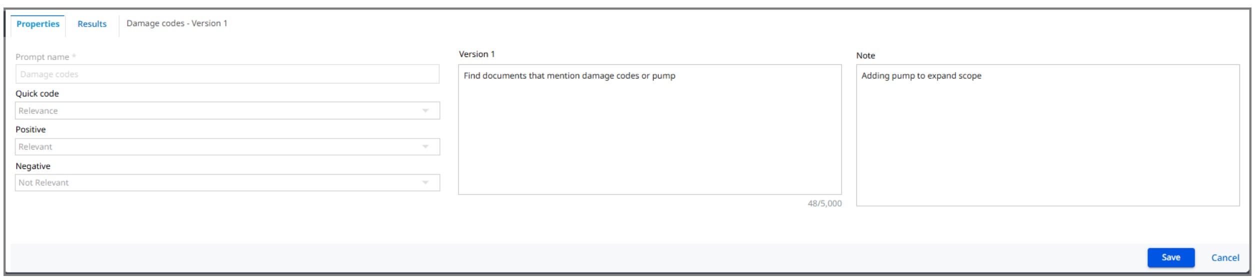
Note: It is important to critically evaluate and verify the information produced by Generative AI to ensure accuracy.

Refine the Prompt

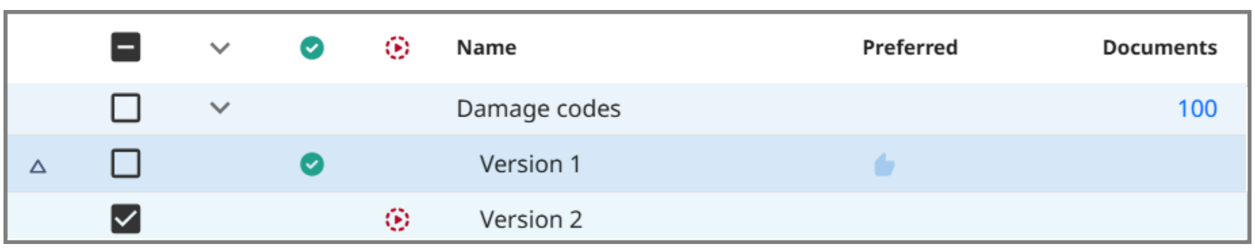
After reviewing the AI results against the evaluation set, you can modify the prompt language to guide the AI's decisions for better precision.

To refine your prompt, navigate to the **Case Home > Analysis** page. Choose the prompt, and then the version you wish to refine:

1. Add additional information to your prompt to give the AI additional points of analysis.

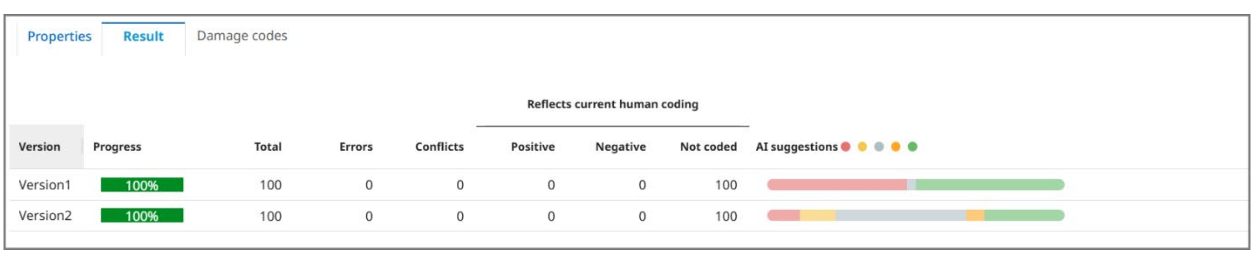


2. Click **Save** to save the changes to your prompt. This automatically creates a new version of the prompt.
3. Check the box next to the prompt version you want to analyze.



4. Click **Analyze**.
5. To include previously analyzed documents, click **Include previously analyzed documents**.
6. Click **Analyze**.

On the **Result** tab, view and compare the results of analyzing Version 1 and Version 2.



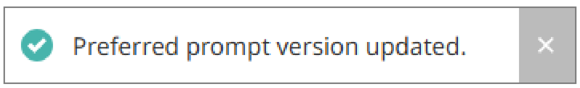
You can repeat this process to further refine the analysis through multiple prompt versions.

Designate a preferred version

Once you are satisfied that no further revisions need to be made to a prompt version and wish to apply it to a set of documents outside your evaluation set, you need to designate that version as preferred. Only the preferred version of a prompt can be run on documents outside of that prompt's evaluation set. A prompt can have only one preferred version.

Click the **Preferred** icon ( ) to designate a preferred version of your prompt.

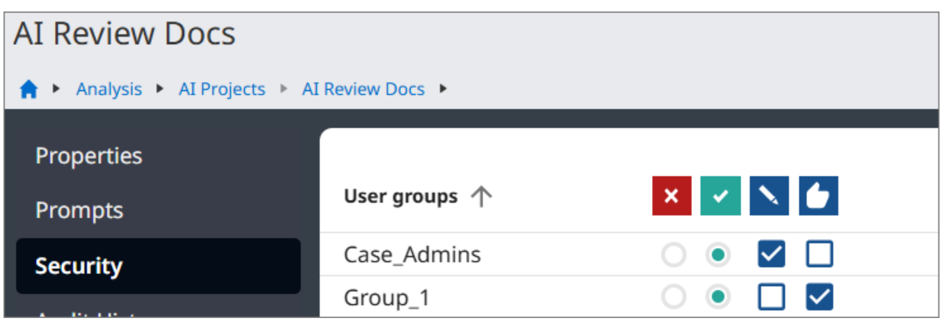
When you select a preferred version, a message appears informing you that your preferred prompt version is updated. Selecting another version automatically deselects a previous selection. Selecting a version already designated as preferred deselects that version.



The number of the preferred version appears as a star icon in the **AI Results** pane on the **Documents** page.

Security

Set security for your AI project on the **Security** tab. By default, your current group is granted Write access when you create a project. All other groups are set to **Deny** by default.



- **Write** access allows users in the group full access to make changes to the project and all prompts in the project.
- **Allow** access gives users in the group read-only permission to view AI Results in the **Documents** area for all prompt versions in the project.
- **Preferred only** ( ) access gives users in the group read-only permission to view AI Results in the **Documents** area for only the prompt versions that are set as preferred.

Audit History

The **Audit History** tab provides an audit trail of the activity for a project. It contains the following information:

- **Name:** The activity that occurred.
- **Action:** The action performed.
- **Value:** The current value of the field.
- **Previous value:** The previous value of the field, if applicable.
- **Date:** The date on which the activity occurred.
- **User:** The user that performed the activity.

Apply preferred prompts to broader document set with the AI Review tool

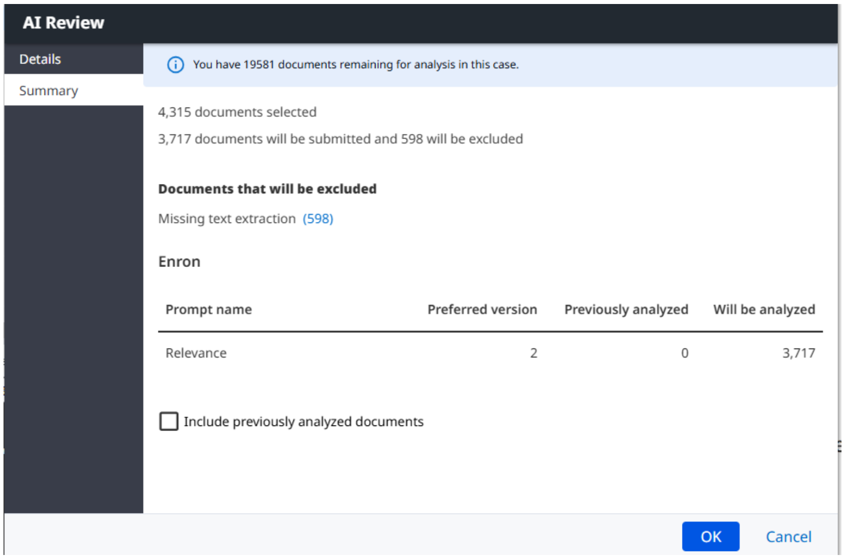
When you have one or more prompts with a preferred version designated, you can apply those prompts to documents outside of the evaluation set from the **Tools** menu with AI Review. As with all analysis jobs, any documents that you wish to run AI analysis on require text extraction.

To perform text extraction:

1. Select one or more documents from the **List** pane.
2. From the **Tools** menu, select **AI Review**.
3. In the **Project** menu, select the project that contains the prompt(s) you wish to use.

   Note: Only projects that have prompt(s) with preferred versions are available for selection.

4. Click the box for each prompt you wish to run. The preferred version number for each prompt is displayed in-line. If you wish to review the prompt, click anywhere on the prompt line to display the text in the **Preview** pane to the right.
5. Click **Next** to review a summary of your selections, including links to documents that must be excluded. Optionally, click the **Include previously analyzed documents** box to rerun prompts against documents that have already been analyzed by the selected prompt version.
6. Click **OK** to submit the AI review job.

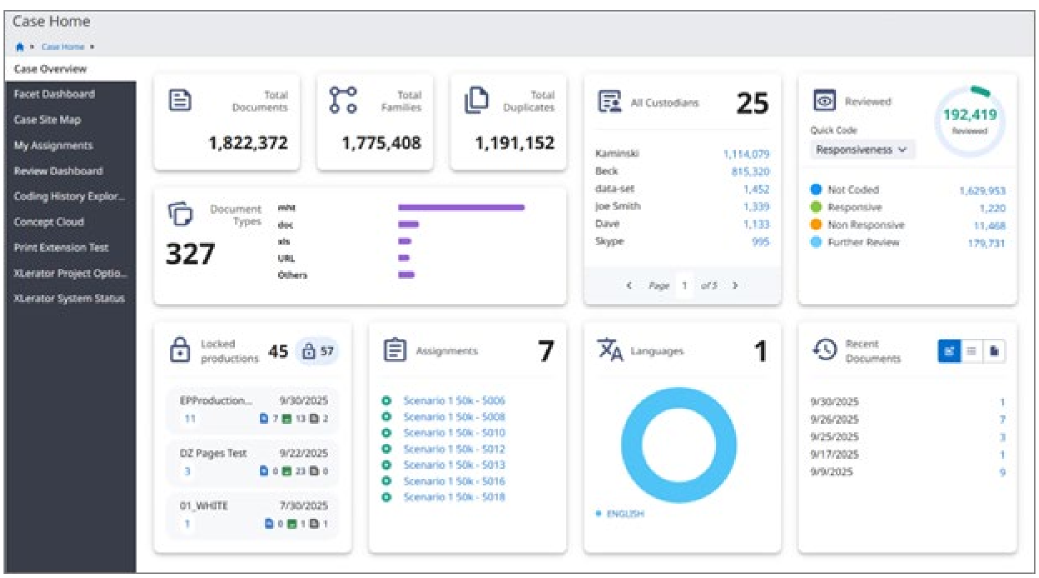


Case Overview dashboard

The Case Overview dashboard is your default landing page when entering a case, providing an immediate visual overview of your case data and recent activity.

You can gain valuable insights into your case composition from a single screen with interactive tiles that display key information such as document types, custodians, language distribution, review progress, and recent productions.

Each dashboard tile features interactive elements allowing you to click on specific metrics to run targeted searches and dive deeper into document sets. This comprehensive view empowers case administrators and reviewers to maintain constant awareness of case status and activity from a single, centralized hub.

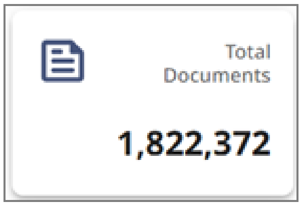


Note: The Case Overview dashboard respects document security settings, ensuring each user only sees the counts and information for documents they are authorized to view.

Total Documents

The **Total Documents** tile prominently displays the total number of base documents in your case. This feature helps you quickly understand the scope of your case and access the full document set with a single click.

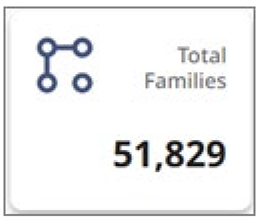
Click on the count to navigate to the **Documents** page with all documents in your search results.



Total Families

The **Total Families** tile provides an immediate count of the total number of families in your case. This count represents documents that are either source documents or stand-alone documents. This feature helps you quickly understand the family structure of your case and access all source and standalone documents with a single click.

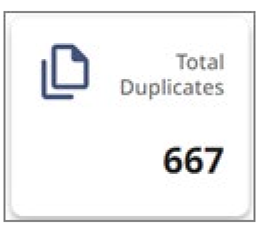
Click on the count to navigate to the **Documents** page with your search results containing all source and standalone documents.



Total Duplicates

The **Total Duplicates** tile displays the total number of duplicate documents in your case. This count represents documents that are hash duplicates of a "master duplicate" document. For example, if there is a master document with nine duplicates (10 documents total), the count would show 9. This feature helps you quickly understand the duplicate content in your case and access all duplicate documents with a single click.

Click on the count to navigate to the **Documents** page with your search results containing all duplicate documents.



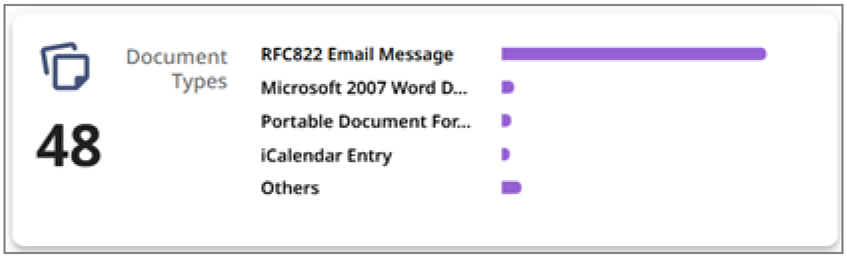
Document Types

The **Document Types** tile provides a visual breakdown of the different document types in your case and their relative proportions. This feature helps you quickly understand the composition of your document collection and access specific document types with a single click.

The tile prominently displays the total number of document types in your case that have at least one document, along with a bar graph showing the distribution of the top five document types by document count. If there are more than five document types, the fifth and remaining types are grouped as **Others**. Each document type has a purple bar representing its proportion of the total document count. Hover over the document count to view a tooltip showing the exact document count for that type.

Click on a document type's bar to go to the **Documents** page with your search results containing all documents of that type. Click on the **Others** bar to search for all documents other than the top four types.

Note: Users in a group without permissions to the **Document Type** field see an **Access denied** message on the tile.



All Custodians

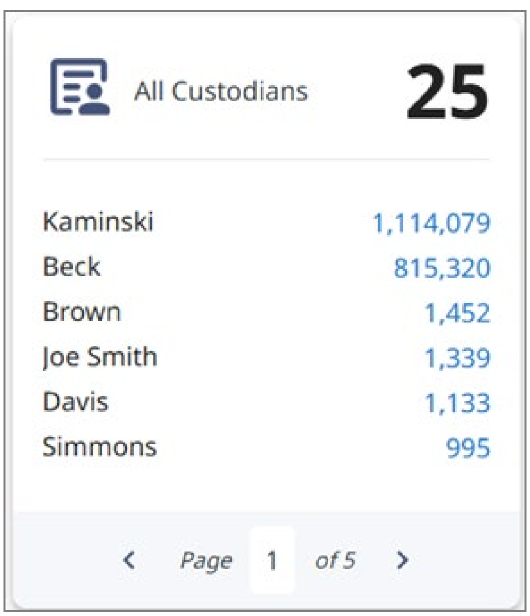
The **All Custodians** tile provides an immediate view of all custodians in your case and their associated document counts. This feature helps you quickly understand the distribution of documents across custodians and access documents from specific custodians with a single click.

The tile prominently displays the total number of custodians in your case. This count represents the number of custodians in the **All Custodians** field that have at least one document in the case.

All custodian names are listed in descending order by document count.

Click on a custodian's document count to go to the **Documents** page with your search results containing all documents that are associated with that custodian.

Note: Users in a group without permissions to the **All Custodians** field see an **Access denied** message on the tile.



Reviewed

The **Reviewed** tile provides a quick overview of document review progress across different coding fields in your case. This feature helps you monitor review status and access coded documents with a single click.

The tile includes a menu that allows you to select which quick code field to display.

Note: By default, your current quick code field (as set in **Documents > Tools > Quick code**) is selected. If no quick code is set, the dropdown shows **Select a field** in gray text. After selecting a field, your selection persists the next time you view the **Case Overview** dashboard.

When you select a field, the tile displays a count and visual representation of reviewed documents.

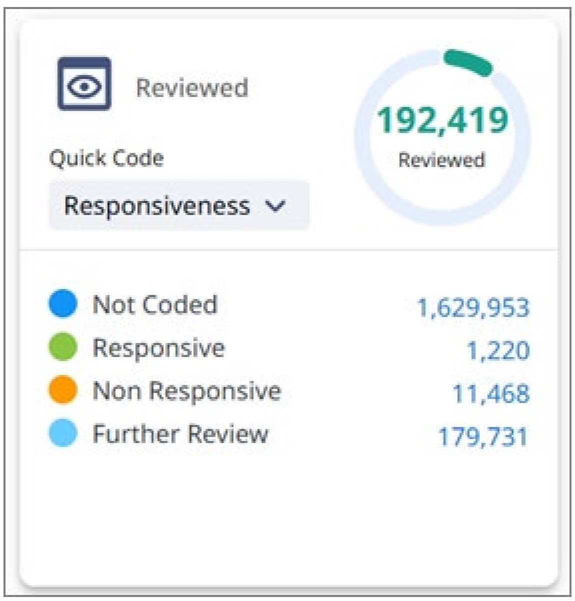
The reviewed count displays in a circle graph showing the total count of reviewed documents in green and the count of not reviewed in grey. Hover over the green and grey sections of the graph to view a tool tip with the total counts of reviewed and not reviewed.

Below the graph, the quick code field's values and their respective colors are listed with the count of documents coded with each value.

Note: Values are listed in the display order that is configured for the field in **Case Setup > Fields**. When there are more than five values available for the quick code field, pagination controls appear at the bottom of the tile.

Click the count next to a coding value to search for documents coded with that value and return to the **Documents** page.

Note: Users in a group that lacks permissions to any quick code field see an **Access denied** message on the tile.



Locked Productions

The **Locked Productions** tile provides a quick overview of locked and unlocked productions in your case. This feature helps administrators and reviewers monitor production status and access production rendition documents with a single click.

The **Locked Productions** tile displays the counts of locked and unlocked productions and the details of recently printed productions.

The tile displays two key metrics:

- **Locked Productions**: Shows the total number of productions that are locked or printed.
- **Unlocked Productions**: Displays the unlocked production count in an oval with an unlock icon.

For case administrators, clicking a count navigates to the **Manage Documents > Productions** page.

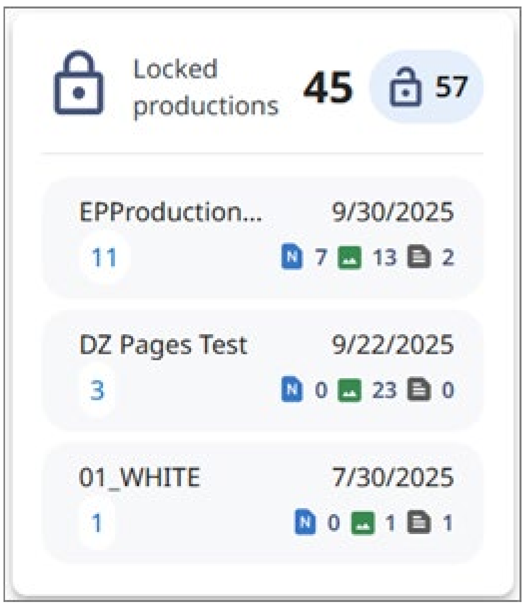
Note: Group Leaders and Group Members cannot access the **Manage Documents > Productions** page, so these counts are not clickable for them.

Below the counts, the following information is displayed for the three most recently printed productions:

- Production name
- Date printed
- Count of rendition documents
- File type icons with counts of files included in the production:
    - **Natives:** Count of native files
    - **Images:** Count of image files
    - **Text:** Count of text files

Click a rendition count to run a search for the renditions in the production and return to the **Documents** page.

Note: Users in a group that lacks permissions to any productions see an **Access denied** message on the tile.

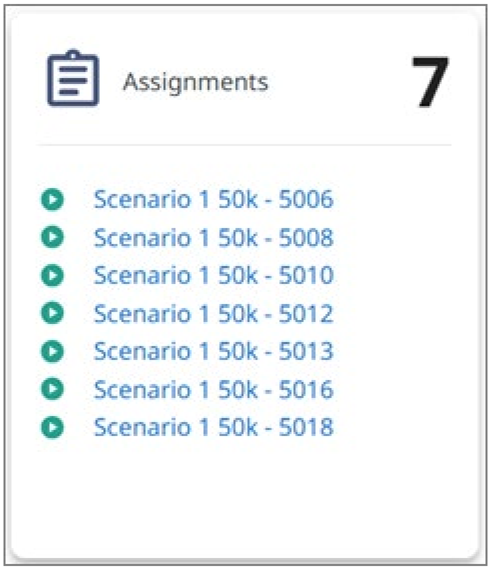


Assignments

The **Assignments** tile provides a quick view of all your active and suspended assignments in one convenient location. This feature helps you monitor your workload and access your assignments efficiently.

At the top is the total count of your assignments. Clicking on the count takes you directly to your **My Assignments** page, where you can see more detailed information about your assignments or get the next available.

The tile lists your active and suspended assignments with their status icons. Click on an assignment name to go to the **Documents** page to review the remaining documents for that assignment.



Languages

The **Languages** tile provides a visual breakdown of the different languages present in your case documents. This feature helps you quickly understand the linguistic composition of your document collection and access documents in specific languages.

The tile displays the total number of languages in your case and a pie chart showing the distribution of the top four languages by document count. If there are more than four languages, the fourth and remaining languages are grouped together as **Others**. Each pie slice has a corresponding label in the legend below the chart; hovering over a slice displays a tooltip showing the exact document count for that language.

Click on a language pie slice or label to go to the **Documents** page with your search results containing all documents with that language. Click on the **Others** slice or label to search for all documents with languages other than the top three.

Note: Users in a group that lacks permissions to the [Meta] Languages field see an **Access denied** message on the tile.

Recent Documents

The **Recent Documents** tile provides quick access to your document activity history, including recently added documents, search results, and viewed documents. This feature helps you track case activity and quickly return to recently accessed content.

The **Recent Documents** tile includes three tabs that provide different views of document activity:

- **Documents Added:** Shows when documents were added to the case.
- **Results History:** Shows your recent search results.
- **Document History:** Shows documents you have recently viewed.

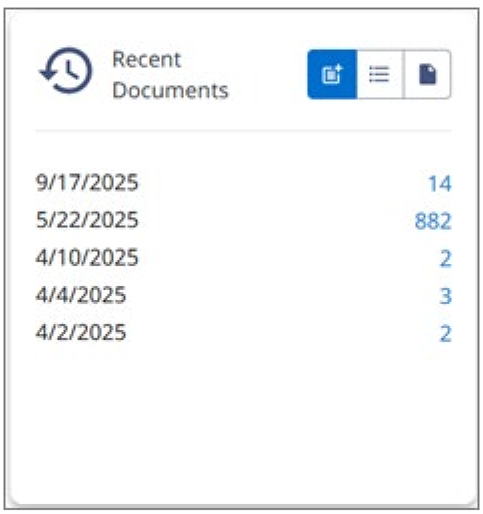
Each tab has a tooltip that shows the name, and the selected tab appears in blue.

The **Documents Added** tab displays the five most recent dates when documents were added to the case, with the count of documents added on each date. Click on a count to run a search for the documents added on the selected date.

Note: This tab is only visible to case administrators or users with full access to all documents.

The **Results History** tab displays descriptions of your five most recent search results, with the document count for each search result. Click a count to return to the **Documents** page with the corresponding search result set.

The **Document History** tab displays the five most recent dates when you viewed documents and the count of documents you viewed on each date. Click a count to search for those documents and return to the **Documents** page.



Nuix Neo Discover with AI Enrichment

The AI Enrichment feature in Nuix Neo Discover provides integration between Nuix Neo Discover and Nuix Enrich, bringing the advantages of AI into the Nuix Neo Discover platform. AI Enrichment streamlines and enhances the process of identifying, analyzing, and reviewing large amounts of data. Additional advantages of this feature include:

- Faster data processing
- Improved accuracy
- Enhanced predictive coding
- Advanced analytics and insights
- Cost efficiency
- Better handling of unstructured data
- Scalability

- Early case assessment (ECA)
- Consistency in data analysis
- Automatic document type identification

The current Nuix Enrich model contains:
- 340 Topics
- 200 Record Types
- 65 Entity Types

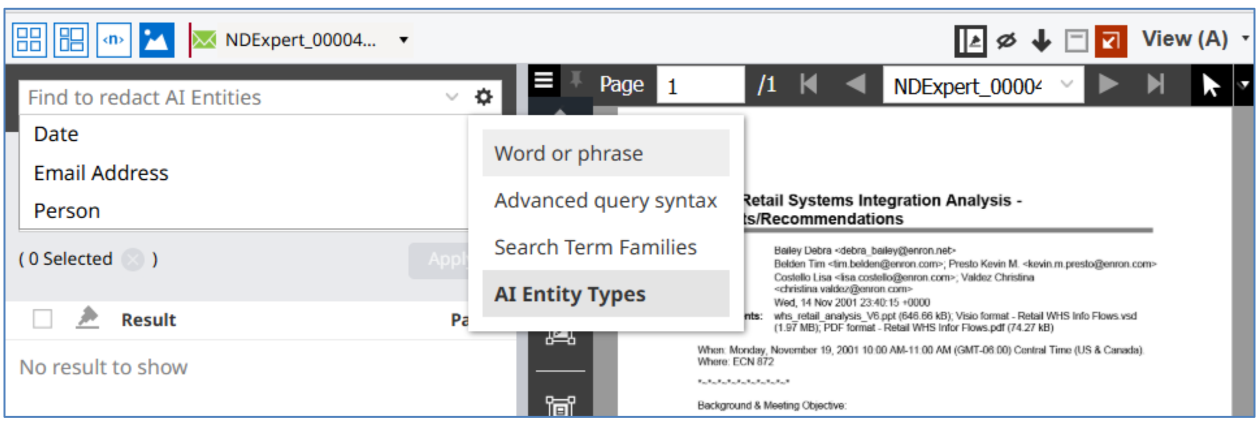
The current Nuix Enrich model supports English. Future releases plan to support additional languages.

Examples of AI Enrichment in Nuix Neo Discover

The following are two examples of how AI Enrichment can augment existing features of Nuix Neo Discover.

Find and Redact

If you have both the AI Enrichment and the Find and Redact features enabled, you can use AI entity types identified during enrichment as Find and Redact search terms.



Predictive Coding templates

You can also use AI Enrichment with predictive coding templates. A predictive coding template contains a predefined set of parameters that govern the behavior of a predictive model. You use a predictive coding template when adding or configuring training for a model.

To include enrichment as a field in a predictive coding template:

1. On the **Case Home > Analysis > Predictive Coding Templates** page, click **Add**.

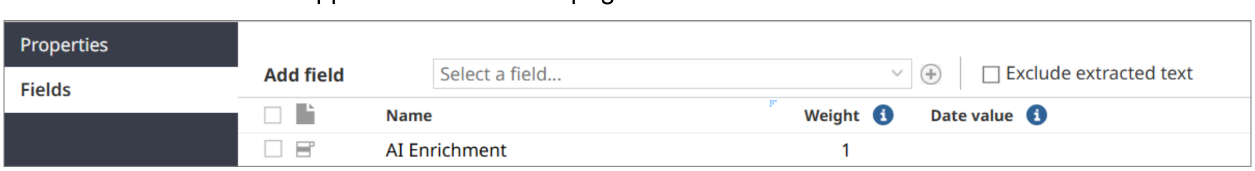
   The **Properties** page appears.

2. Add a name and description for the template, and click **Save**.

   The **Fields** page appears.

3. Select **AI Enrichment** in the **Add field** list and click the **+** (plus sign) button.

   The **AI Enrichment** field appears on the **Fields** page.

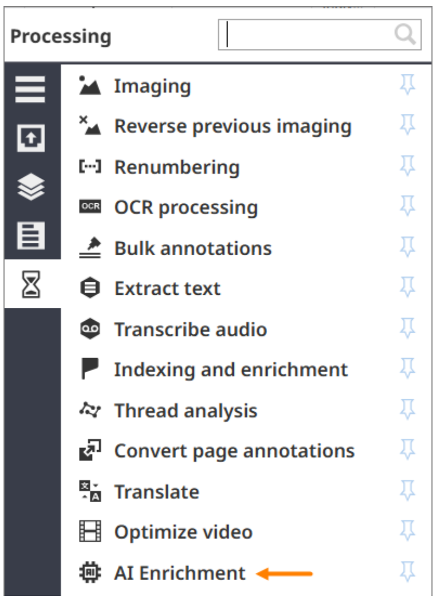


4. A value appears in the **Weight** column for the field. The weight for each field is 1 by default, but you can change the value to anything between 1 and 10. Weight reflects the amount of influence a field has on the model in relation to other fields in the template. For example, if you want the **People - Between** field to be more heavily considered in the model than the **Date Added to Case** field, adjust the value in the **Weight** column for the **People - Between** field to be 2 and the value for **Date Added to Case** to 1.
5. Click **Finish**.

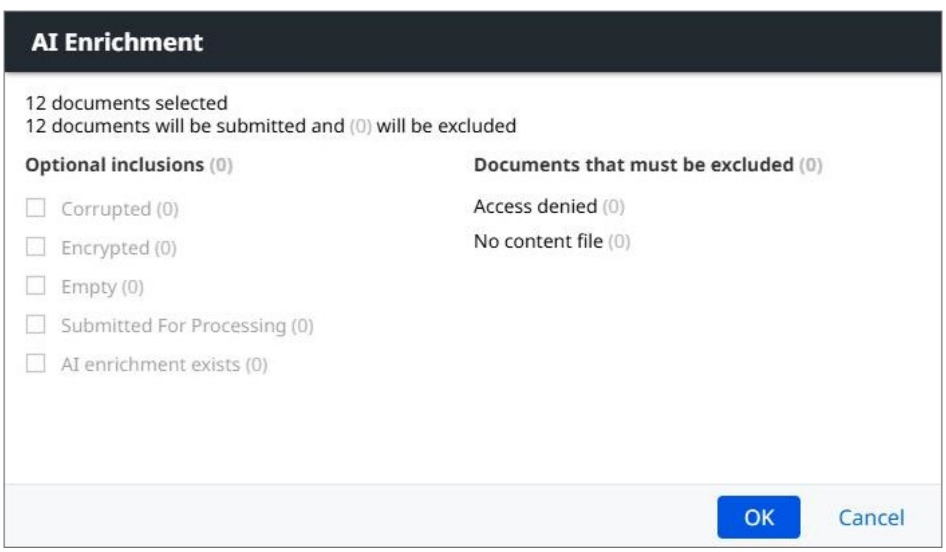
Submit documents for enrichment

To submit a set of documents for enrichment in Nuix Neo Discover:

1. On the **Documents** page, in the **List** pane, select the check box next to the documents that you want to submit for enrichment.
2. On the **Tools** menu, under **Processing**, select **AI Enrichment**.



The **AI Enrichment** dialog box appears.



The documents that you selected for enrichment are sorted by the number of documents that will be submitted for enrichment and the number of documents that will not be submitted.

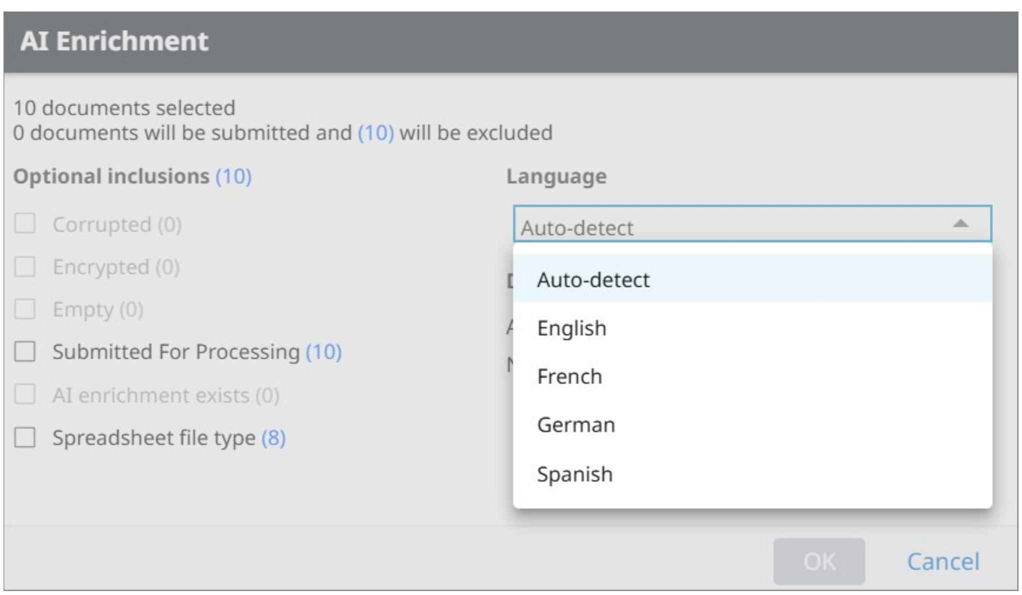
Note: A single document may be counted under multiple categories in either the **Optional inclusions** area or the **Documents that must be excluded** area. Documents that are counted in any of the categories in the **Documents that must be excluded** area are not counted in the **Optional inclusions** area.

3. In the **Optional inclusions** area, you can choose to enrich documents that would not be enriched by default. To include documents that would otherwise be excluded from the enrichment job, select any of the following check boxes:
   a. **Corrupted:** The documents have a value of Corrupted in the [Meta] Processing Exceptions field.
   b. **Encrypted:** The documents have a value of Encrypted in the [Meta] Processing Exceptions field.
   c. **Empty (0 KB):** The documents have a file size of 0 KB.
   d. **Submitted for processing:** The AI Enrichment Status field value is either Processing or Submitted.
   e. **AI enrichment exists:** The documents have already been enriched.

   Note: You can rerun enrichment jobs on documents that have already been through an enrichment job. Rerunning the enrichment allows you to take advantage of refinements to the enrichment models. If you rerun the enrichment job, you must select the **AI enrichment exists** check box to rerun enrichment on the selected documents.

4. In the **Language** menu, select the analysis language when submitting an AI Enrichment job. Select from the following languages:
   - English
   - French
   - German
   - Spanish

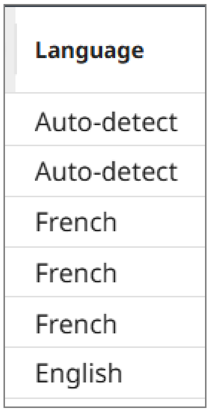
Note: You can select only one language. If the chosen language does not appear in the document, returned results are misleading. For example, if a document contains only English, and French is selected as the analysis language, the analysis for that document succeeds, but the French model does not return AI Enrichment results.



Auto-detect determines the language based on text at the beginning of each document segment and chooses accordingly.

Note: If the detected language is not one of the supported languages, analysis returns a result of “succeed” but returns no AI Enrichment results.

A **Language** column on the **Manage Documents > AI Enrichment** page displays the language setting used for each job.



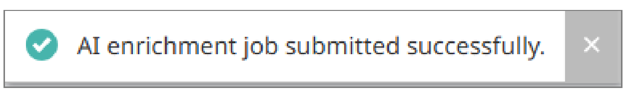
5. In the **Documents that must be excluded** area, you can view documents that are not included in the enrichment job. Click a number to see the list of documents.

   The following types of documents are excluded from enrichment jobs:

   a. **Access denied:** The documents are unavailable because the user does not have access to the document itself, for example, if the document is in a private binder.
   b. **No content file:** The documents have no applicable content.

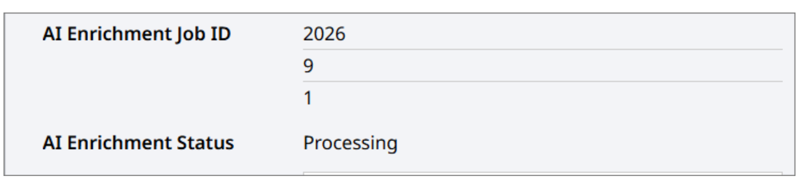
6. Click **OK**.

   A message appears indicating that you have submitted the job successfully.



View the status of AI Enrichment jobs

After you submit a job, you can see the status of the documents submitted for enrichment in the **Processing** section of the **Conditional Coding** pane.

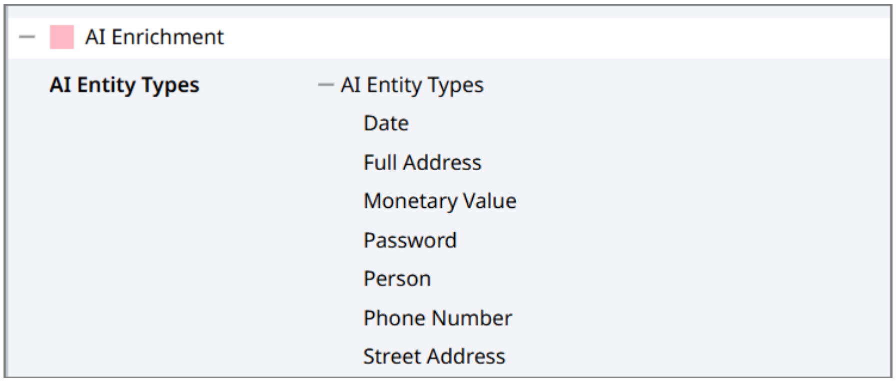


View the results of AI Enrichment in the Conditional Coding pane

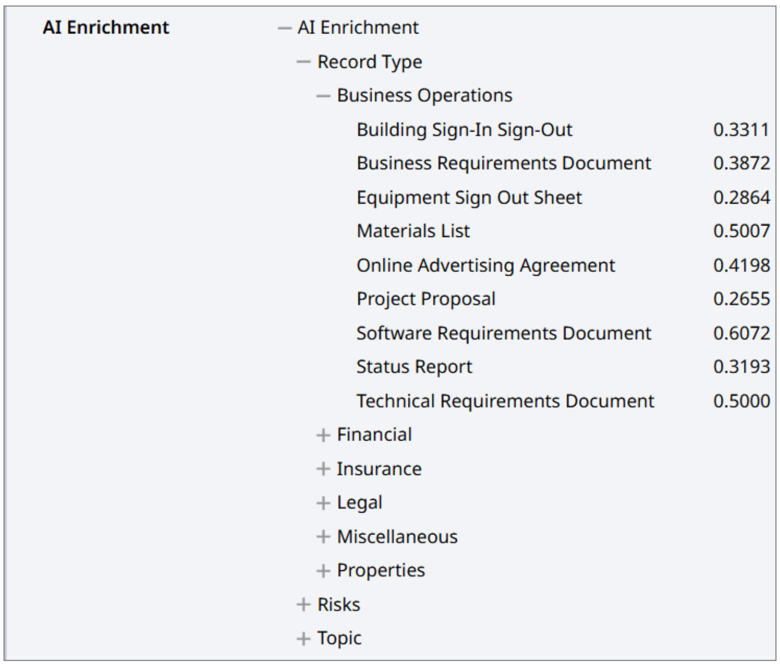
When the AI Enrichment job is complete, you can view the results in the **AI Enrichment** section of the **Conditional Coding** pane.

In the **AI Entity Types** area, click the plus sign to display an expanded view of the AI entity types that were detected in the submitted document.

Note: The screenshot below shows a small example of the available **AI Entity Types**. The list of entity types is continuously updated.



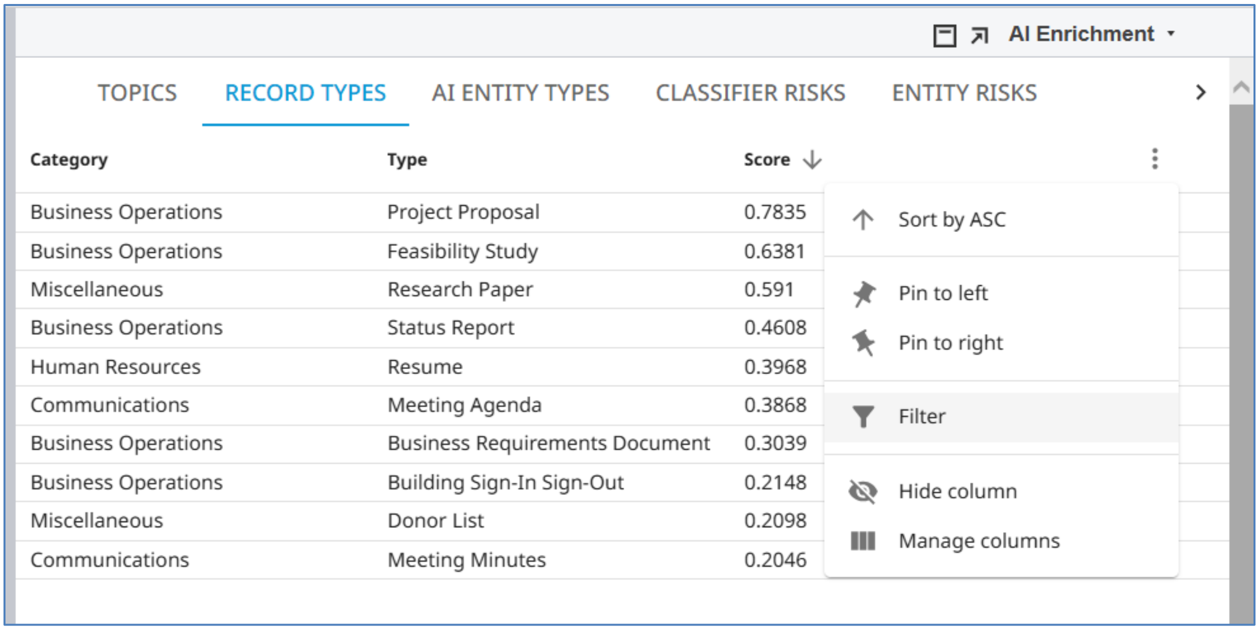
In the **AI Enrichment** area, click the plus sign to display an expanded view of the enrichment results found in the document. You can also see the ranking, on a scale of 0 to 1, of the likelihood that the category is relevant to the document.



View the results of AI Enrichment in the AI Enrichment pane

The tabs in the **AI Enrichment** pane display information about your enrichment data.

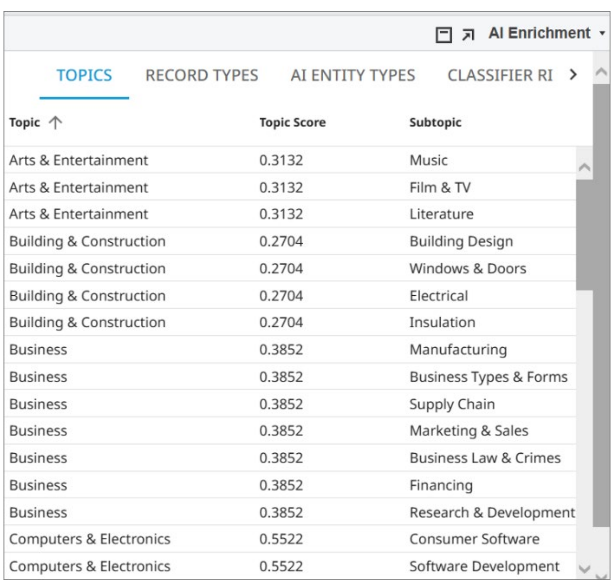
Tip: You can click on the column headers in each tab to sort and filter information.



Topics tab

The **Topics** tab displays the following columns:

- **Topic**: The topics, or categories of information, found within the document.
- **Topic score**: The likelihood, on a scale of 0-1, that the category is relevant to the document.
- **Subtopic**: The subtopic within the larger topic your document falls in to.
- **Subtopic score**: The likelihood, on a scale of 0-1, that the subtopic is relevant to the document.

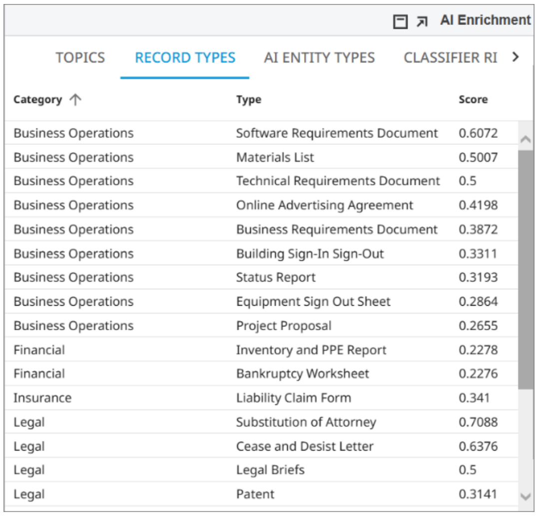


Record Types tab

The **Record Types** tab contains the following columns:

- **Category**: A grouping of similar record types.

- **Type**: The label for the specific type of document.
- **Score**: The likelihood, on a scale of 0-1, that the type is relevant to the document.

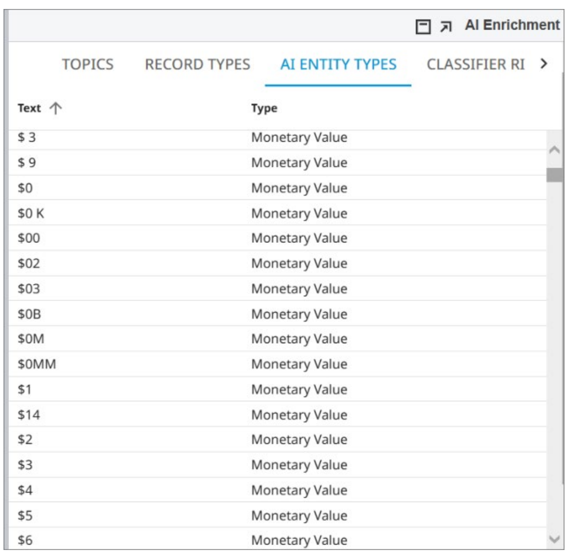


Category	Type	Score
Business Operations	Software Requirements Document	0.6072
Business Operations	Materials List	0.5007
Business Operations	Technical Requirements Document	0.5
Business Operations	Online Advertising Agreement	0.4198
Business Operations	Business Requirements Document	0.3872
Business Operations	Building Sign-In Sign-Out	0.3311
Business Operations	Status Report	0.3193
Business Operations	Equipment Sign Out Sheet	0.2864
Business Operations	Project Proposal	0.2655
Financial	Inventory and PPE Report	0.2278
Financial	Bankruptcy Worksheet	0.2276
Insurance	Liability Claim Form	0.341
Legal	Substitution of Attorney	0.7088
Legal	Cease and Desist Letter	0.6376
Legal	Legal Briefs	0.5
Legal	Patent	0.3141

AI Entity Types tab

The **AI Entity Types** tab contains the following columns:

- **Text**: The specific value extracted by the AI Entity.
- **Type**: The AI Entity Type that was identified by AI Enrichment.

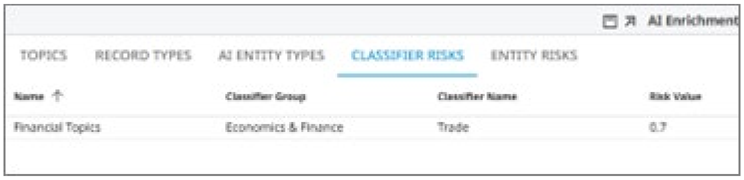


Text	Type
$ 3	Monetary Value
$ 9	Monetary Value
$0	Monetary Value
$0 K	Monetary Value
$00	Monetary Value
$02	Monetary Value
$03	Monetary Value
$0B	Monetary Value
$0M	Monetary Value
$0MM	Monetary Value
$1	Monetary Value
$14	Monetary Value
$2	Monetary Value
$3	Monetary Value
$4	Monetary Value
$5	Monetary Value
$6	Monetary Value

Classifier Risks tab

The **Classifier Risks** tab contains the following columns:

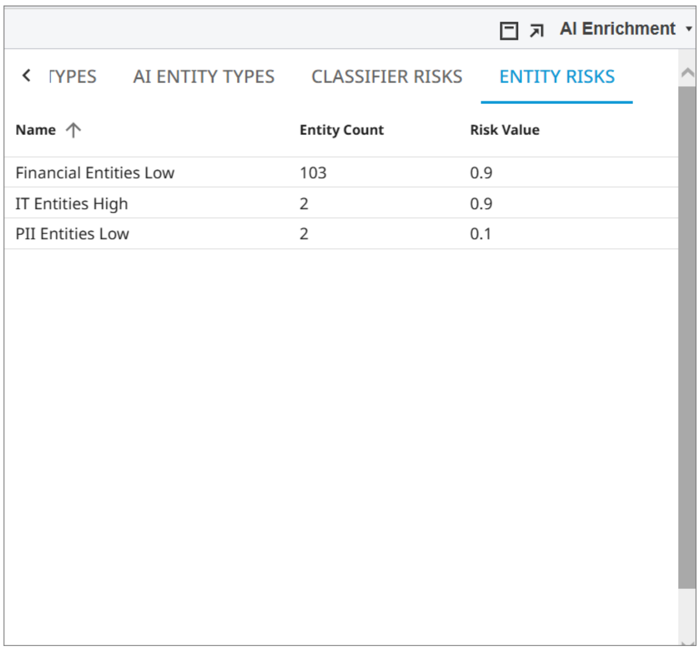
- **Name**: The name of the risk category.
- **Classifier Group**: The parent topic or record type category of the model that triggered the risk.
- **Classifier Name**: The subtopic or record type that triggered the risk.
- **Risk Value**: The value of the risk.



Entity Risks tab

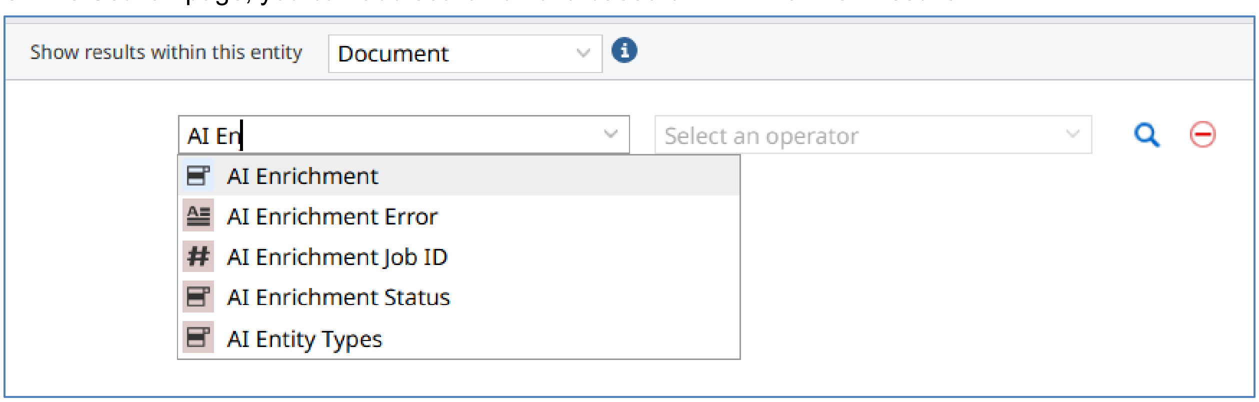
The **Entity Risks** tab contains the following columns:

- **Name**: The name of the risk category.
- **Entity Count**: The number of entities associated with the risk that appear in the document.
- **Risk Value**: The value of the risk.



Search the results of AI Enrichment

On the **Search** page, you can add search criteria based on AI Enrichment results.



When selected, the AI Enrichment values display in a tree structure. After selecting a value to search, you can use the **Add Additional Criteria** option to display an adjustable score range slider.

Expanded Support for Ingesting Chat Data

Nuix Neo Discover supports ingesting chat messages and conversations from the following communication platforms:

- **Mobile and SMS:** AOS SMS, Apple iOS, Google Android SMS
- **Collaboration Tools:** Microsoft 365 Teams, Slack, Skype
- **Social and Messaging:** Facebook, WhatsApp, Line (Android/iOS), Google Hangouts, Reuters Messenger, Bloomberg IM

Supported File Types

Nuix Neo Discover supports the following file types:

- Microsoft Teams (.pst)
- Slack (.json)
- Google Hangouts (.json)
- Relativity Short Message Format (.rsmf)
- Mobile device forensic images:
    - MSAB (.msab, .xry)
    - Oxygen (.xml)
    - Axiom Magnet Portable Case
    - Cellebrite (.ufdr)
    - GMDSOFT (.mdex)

Note: If using Microsoft Purview eDiscovery to export Microsoft Teams chat data, Nuix recommends the following best practices:

- Use the **Searches** tab in Purview **Cases** to export data.
- Export in .pst format.
- Uncheck **Organize conversation into HTML transcript**.

Ingest chat data in Nuix Neo Discover

To ingest chat data, follow the same workflow used for ingesting all other types of data:

1. Configure ingestions settings.
2. Upload the data and start an ingestion job.

For more information on working with Ingestions, see the **Manage Documents > Ingestions** section of the Case Administration online help.

Configure ingestion settings

When chat data is ingested, conversation documents are created that contain the messages that participants sent to each other.

When ingesting chat data, there are three settings to consider that control how the chat messages are segmented across documents. You can choose to split conversations by the number of messages or by idle time intervals.

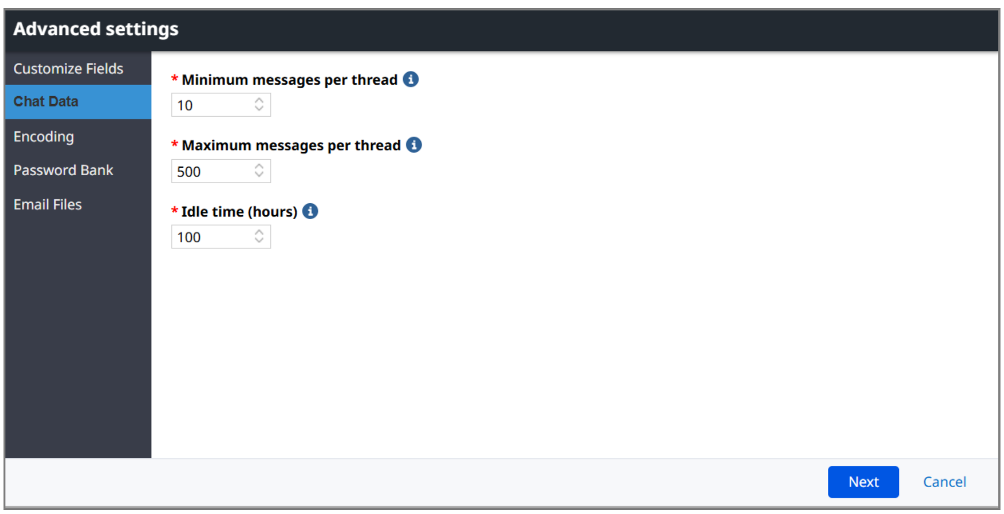
Conversation handling and segmentation

Use the options in **Ingestions > Advanced settings > Chat Data** to indicate how to divide entire chat conversations into segments, each of which is then represented as individual documents.

- Use **Minimum messages per thread** to indicate the minimum number of messages that should be used to break a thread into documents. Threads containing fewer messages than the number specified in the **Minimum messages per thread** field become a single document.
- Use **Maximum messages per thread** to indicate the maximum number of messages that should be used to break a thread into documents. Threads containing more messages than the number specified in the **Maximum messages per thread** field are broken into separate documents.

  Note: The application breaks a thread into separate documents at the largest idle period between messages that are closest to the maximum message limit. The application breaks the thread at exactly the maximum message limit if the thread does not contain a 15-minute idle period.

- Use **Idle time (hours)** to indicate the time difference (in hours) between when messages in the thread were sent that should be used to break a thread into separate documents.



Note: During ingestion, an HTML rendering of each chat conversation segment will be created as a separate document. Chat conversation documents cannot be divided into separate documents after they are created.

Tip: Hash values for chat conversation documents will be generated after the conversation segment is created. For better identification of duplicate chat conversation documents, use the same settings for all ingestions in the case.

Upload chat data and start an ingestion job

On the **Manage Documents > Ingestions** page:

- Click **Upload** to select chat data locally to upload and ingest into Nuix Neo Discover.
  - Upload the chat data to the Ingest staging folder organized into at least two folder levels with one of the levels named for the custodian.

Note: The folder levels must match the folder structure selected in the **Ingestions** > **Default Settings** window.

   - In the **Upload** window, optionally select the option **Start ingestion after upload**. This will start the ingestion job automatically after the files have completed transferring to the Ingest staging folder.

- If the ingestion job was not started automatically after uploading, click the **Add** button to open the **Add ingestion** dialog and select the staging folders containing your chat data to start an ingestion job.

Review chat conversations

After ingesting chat data, you can review chat conversations and their attachments in the **View** pane.

About chat documents

An example of a chat conversation document is shown below.

A chat conversation includes a variety of information, in addition to the messages that participants send to each other. A chat can include the following information:

- Content that participants send to each other, such as messages, reactions, and attachments, as well as invite, join, and leave events.

- Information about participants in the conversation, the date range of the conversation, and the number of messages sent by each participant are clearly displayed in a summary table at the top of the document.
- Emojis and images in messages are visible inline, with other attachments referenced in the conversation and included as separate documents attached to the conversation document.

Review chat documents

Depending on your review strategy, you can review chat conversation documents in the **View** pane using the following views:

- **Formatted content view:** Shows an interactive display of the conversation with the ability to select participants or attachments in a summary table to highlight those chats within the conversation for easier viewing. The rows in the conversation are color-coded based on participants. You can also display or hide keyword highlights.
- **Native and Office Online views:** Displays a plain text version of the same information that appears in the **Formatted content** view.

The chat conversation document includes a summary table that displays the participants' names and the number of messages (MSG) and attachments (ATC) that were sent by each participant. The table also contains information on invite events (INV), join events (JOI), and leave events (LEF).

Tip: To search for chat conversation documents and their attachments, search for documents that have "chat conversation" in the **Document Title** field and include sources and attachments.

To review chat documents:

1. On the **Documents** page, select a chat document.
2. In the **View** pane, select from the following:

- To view the content that participants sent to each other, click the **Formatted content** button.

  The chat opens in the **Formatted content** view. To help identify the contents of the chat, you can display highlights in the following ways:

  - To display highlights on all content that was sent by an individual, click the individual's name.
  - To display highlights on the messages that were sent by an individual, click the corresponding number in the **MSG** column.
  - To display highlights on the attachments that were sent by an individual, click the corresponding number in the **ATC** column.
  - To display highlights on the join and leave events in the chat, click the corresponding numbers in the **JOI** or **LEF** columns.
  - To hide the highlights, click a cell in the summary table again.

- To view a plain text version of the chat conversation, click the **Native or Office Online** buttons.

The metadata fields for chat documents have field names prefixed with **[Meta] Chat…** and appear in the **Conditional Coding** pane **All values** template. Participant names are captured in the People (**From** and **To**) fields and can be used to identify communications in the **Communication Network** pane.

Note: To add annotations to a chat document, such as redactions, you can create an image file of the chat document and then annotate the image file. The Imaging feature uses the **Native** view to convert the chat document into an image. If an image file of the chat was created, the imaged pages open in the **Image** viewer.

Produce and Export Chat Data

Chat conversation documents can be imaged, redacted, and produced like any other document. If native files are included in a production or export, the .html file that displays the conversation is exported for chat conversation documents. Chat metadata fields and participants (**People** fields) can be added to load file templates if required for your productions.

Saved Search Folders

Nuix Neo Discover now supports organizing saved searches in a folder structure. Folders are group-securable and sharable across user groups. Folders can also be made private for an individual user.

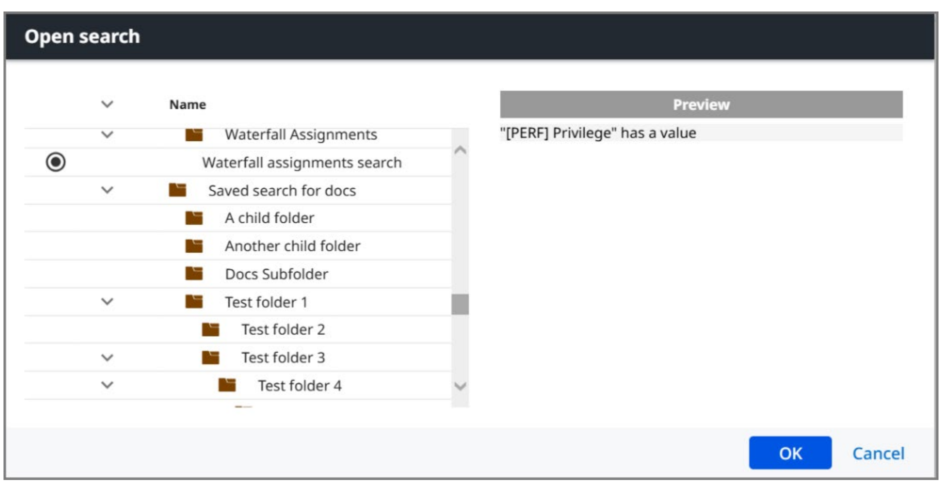
Saved searches are organized in the folder structure as configured by your administrator on the **Case Setup > Saved Searches** page. You have access to your own private folders, as well as the shared folders and saved searches that are allowed for your group. Saved search folders are available in the following areas:

- Search
  - Open search
  - Save search as
  - Select a saved search as search criteria
- Browse pane
- Cubes
- Populations
- Productions > Add QC rule from saved search
- Workflow phase validation criteria

Open search

When you select a saved search, the **Open search** dialog displays searches organized in the folder tree. All folders are expanded by default when the dialog is opened. Use the **Collapse** and **Expand** buttons to hide or show child folders.

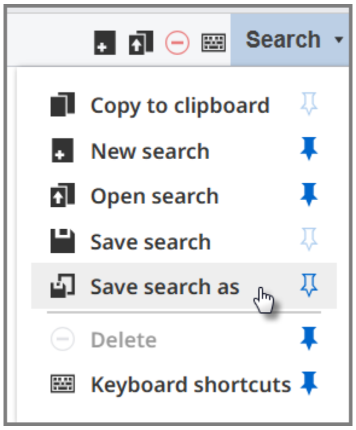
Tip: Sort or filter on the **Name** column to locate folders or searches within the tree.



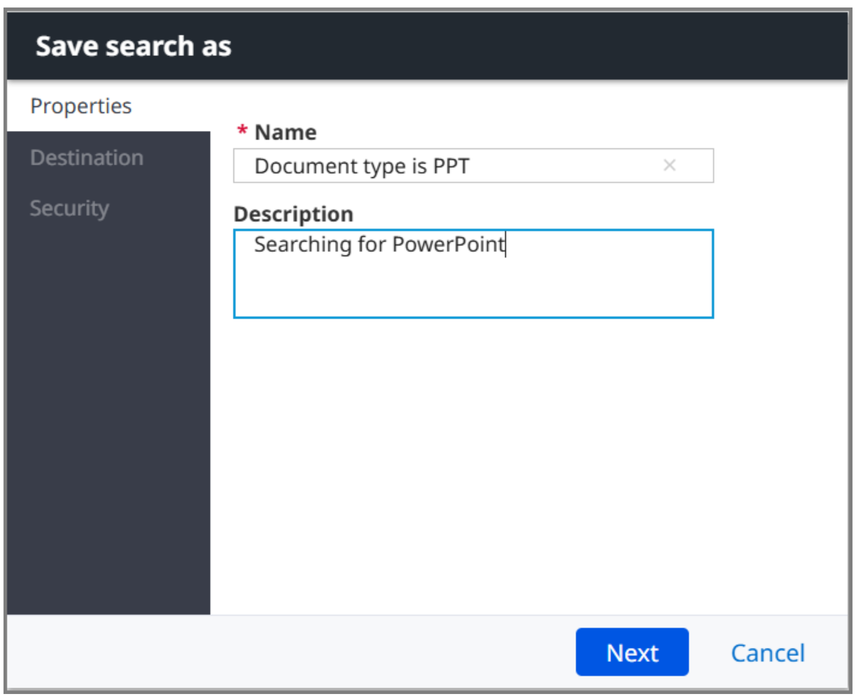
Save search as

On the **Search** page, save a search using **Save search as**:

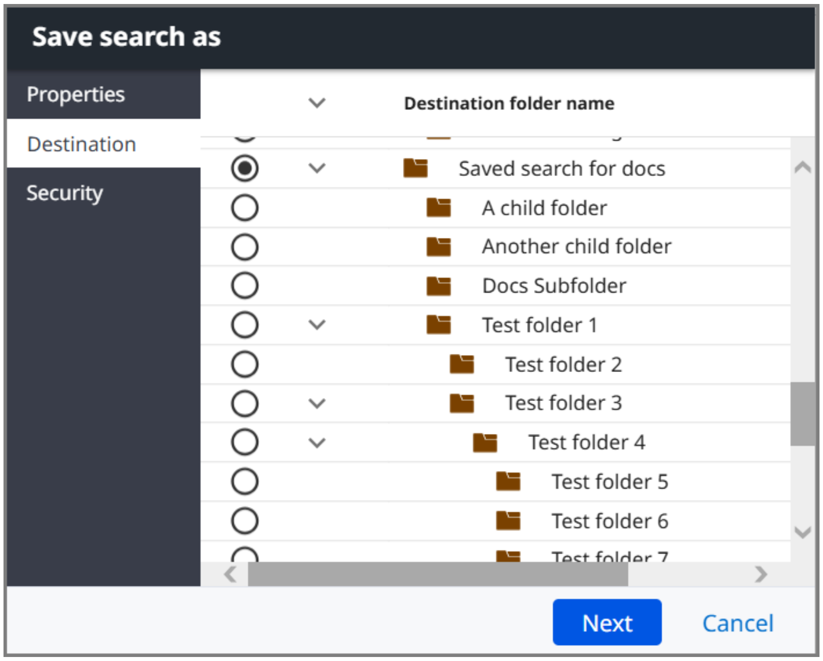
1. Click **Search** to open the **Search** menu.
2. Click **Save search as** to open the **Save search as** window.



3. On the **Properties** tab, enter a name for the search and an optional description.

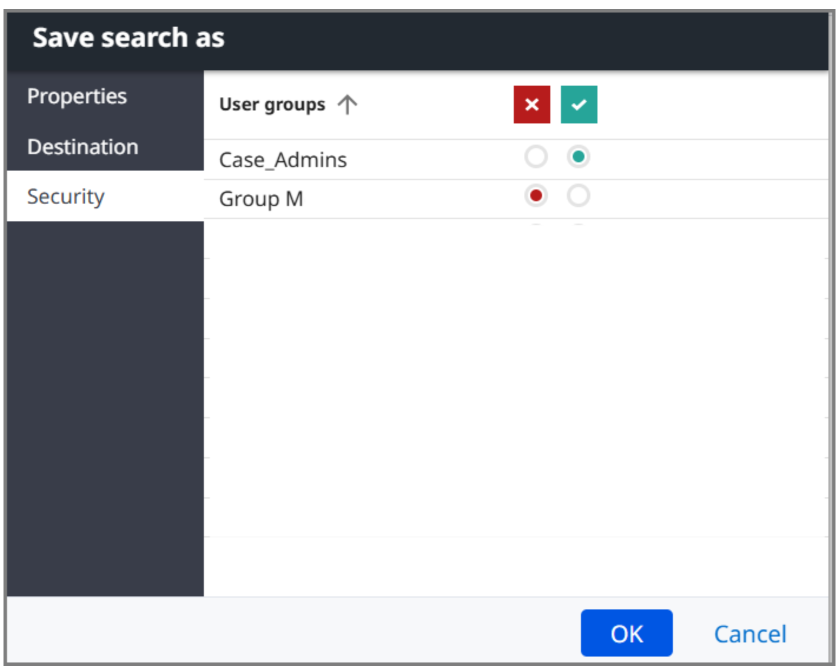


4. Click **Next**.
5. On the **Destination** tab, select a folder in which to save the search.



Note: You can choose **Top-level (no folder)** as a destination.

6. Click **Next**.
7. On the **Security** tab, set the group security for the saved search.



8. Click **OK**.

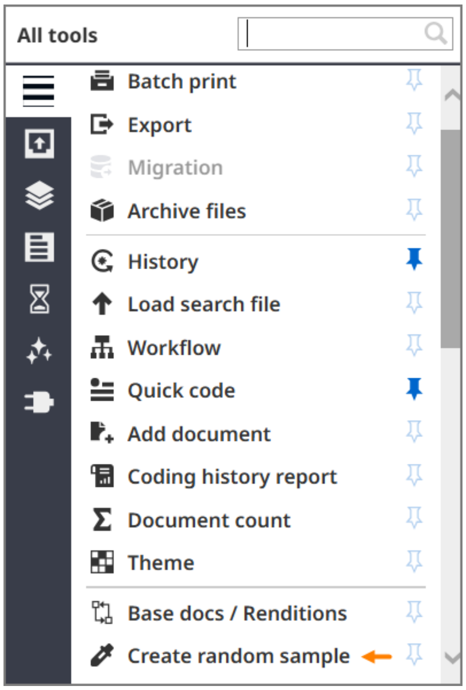
Note: The security of the destination folder overrides the group security of the saved search. For example, if security for a saved search is set to **Allow** for Group A, and that search is saved in a folder that is only allowed for Group B, Group A users do not have access to the saved search unless the folder permissions are updated to also allow access for Group A.

Create random sample

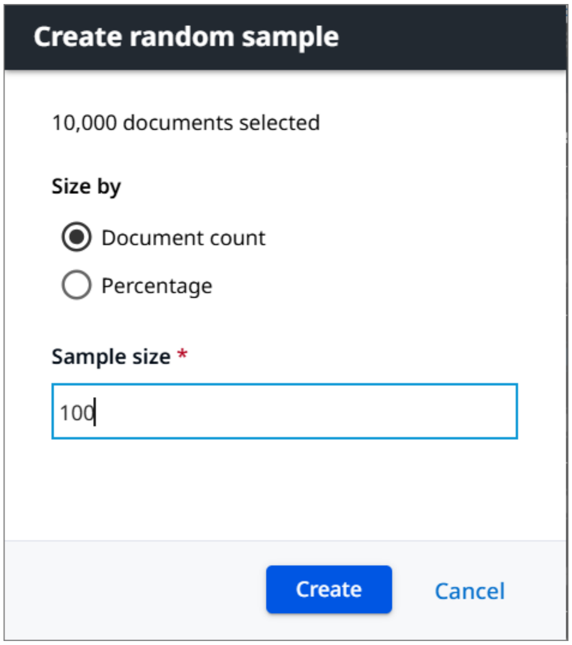
With the Create random sample feature, you can generate a random sample from a collection of documents. This allows you to validate document reviews produced both by human reviewers and by AI review.

To create a random sample:

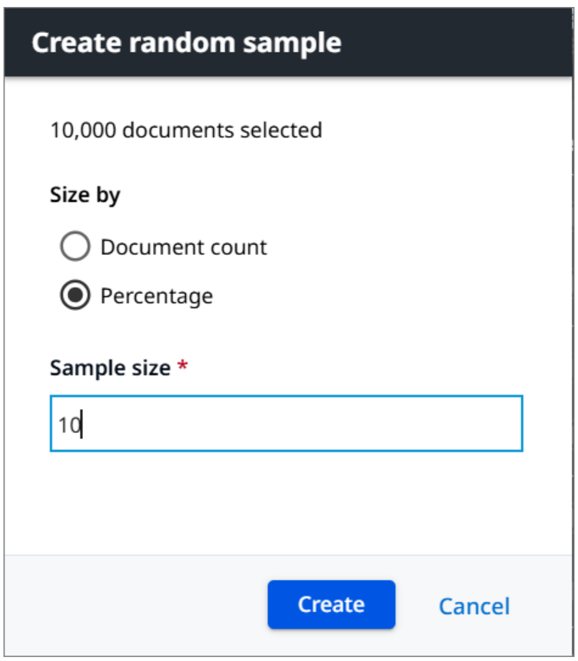
1. To enable the **Create random sample** option, in the **List** pane, select at least one document in the search results.
2. On the **Tools** menu, select **Create random sample**.



3. In the **Create random sample** dialog box, there are two methods available for determining the number of documents in the random sample:
    - **Document Count**: Enter the number of documents you want included in the random sample.



- **Percentage**: Enter the percentage of the collection of documents that you want included in the sample.



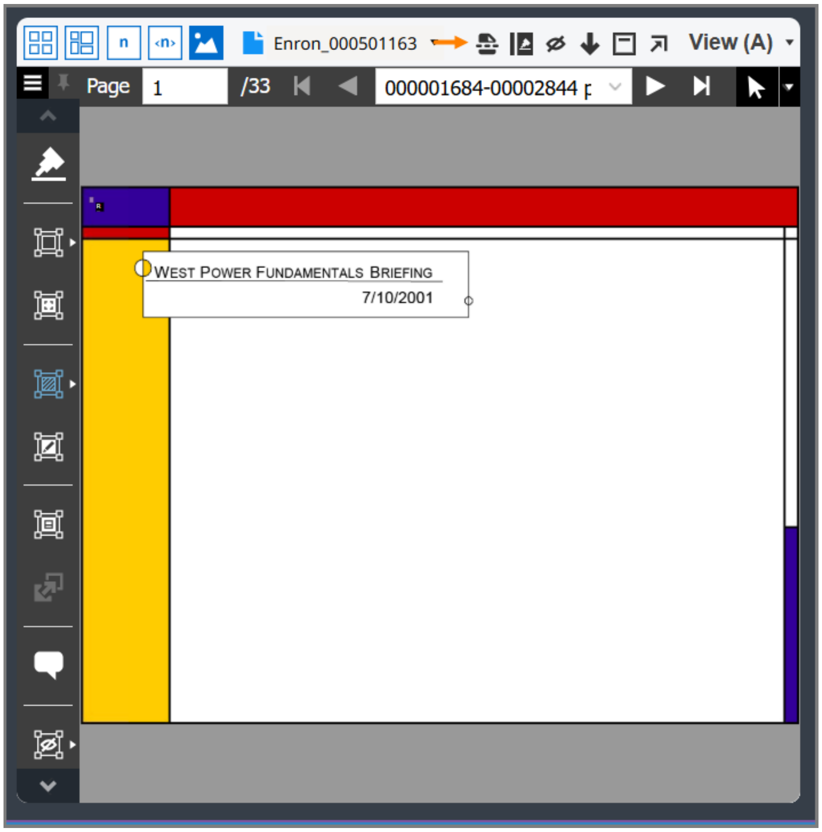
4. Click **Create**.

Your random sample opens in the **List** pane. From there, you can use the sample to validate the results of a previous review.

Document unitization

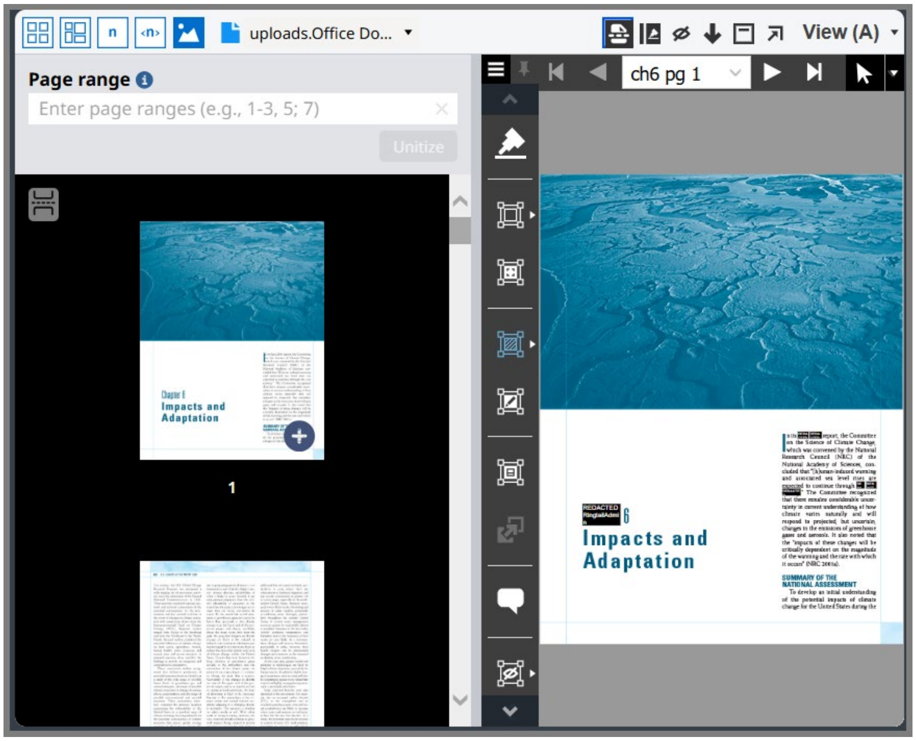
With the unitization feature in Nuix Neo Discover, you can create multiple discrete documents from multipage PDF-imaged documents. This allows you, for example, to extract a specific subset of documents from among a large set of ingested documents without having to rescan and reingest the required documents.

Unitize documents in the **Image viewer** in the **View** pane.

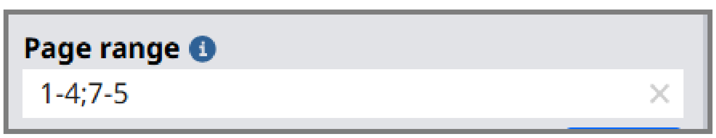


To unitize documents:

1. Select a PDF, or any document that has been imaged to PDF, from which you want to extract a subset of pages.
2. Click the **Unitize** icon . The **View** pane displays a split screen of thumbnails of the individual pages of the PDF.

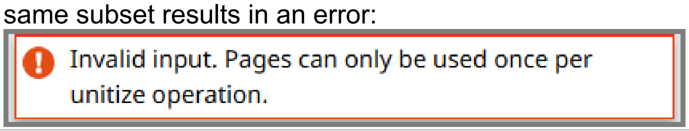


3. Select the pages that you want to include in the subset of pages using one of the following methods:
   - In the thumbnail images, click **Add** ( ) on the individual pages that you wish to add to the unitized document.
   - Enter a page range in the **Page range** field.

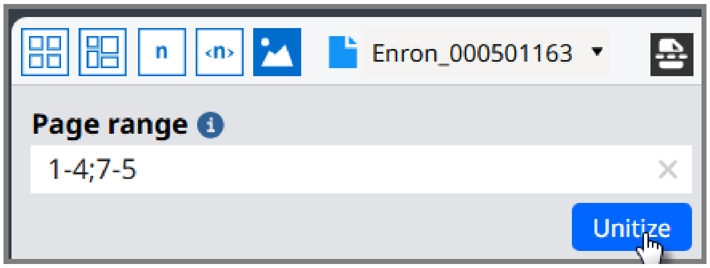


Note: Pages collate into the unitized document in the order in which they are added to the subset. For example, entering the page range 5-7 collates the pages in numerical order, whereas entering the page range 7-5 collates the pages in reverse numerical order. Similarly, if you select 5, 4, 1, 8 in that order, the unitization process produces a four-page document with the pages in that specific order. To start a new document during the unitization process, enter a semicolon in the **Page range** field between sets of page numbers or click **Insert document break** . This produces multiple unitized documents from your original.

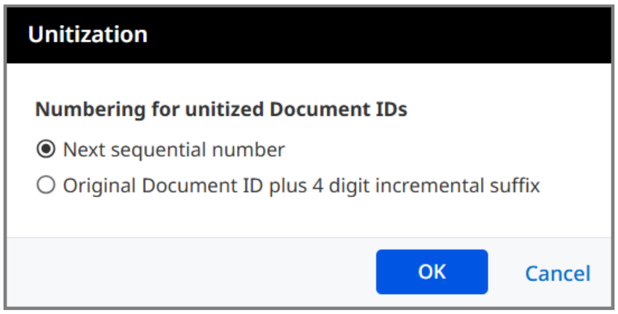
Note: Include each page only once per unitization process. Attempting to include a page twice in the same subset results in an error:



4. Click **Unitize**.

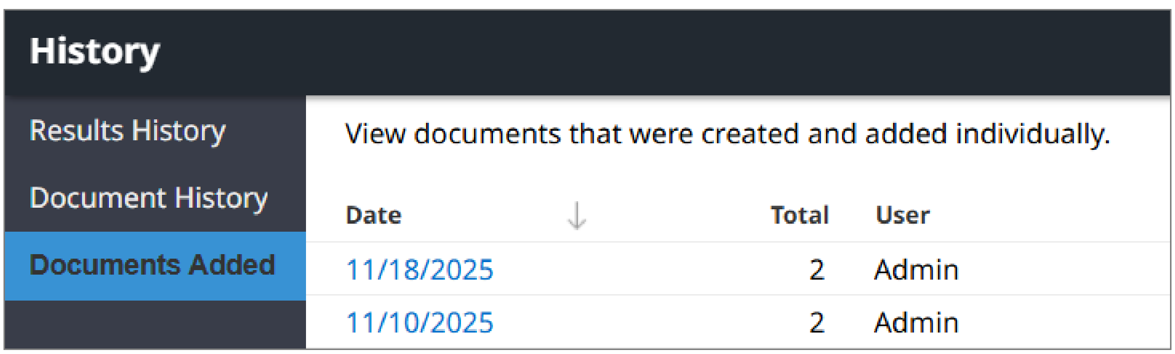


5. In the **Unitization** window, select the document ID numbering scheme for the unitized document:
   - Next sequential number
   - Original Document ID plus four-digit incremental suffix



6. Click **OK**.

The unitized documents appear along with the base document in your case. To view your unitized documents, click **History** in the top navigation bar and select the **Documents Added** tab.



Click the date on which you performed the unitization process to view your unitized documents in the **List** pane.

Note: In the new unitized documents, metadata is not copied from the source document. Only **Document Date** is populated, with the date on which you performed the unitization.

New system fields for ingestion jobs

Ingestion jobs populate four new system fields when this metadata is available for the native files. These fields capture the created and modified dates that are stored by the application:

- [Meta] Date Application Created
- [Meta] Date Application Created Time
- [Meta] Date Application Modified
- [Meta] Date Application Modified Time

People-Recipients and Organization-Recipients fields

The following fields are now available for searching and can be added to Column templates and Conditional Coding templates.

- **People – Recipients**
- **Organization – Recipients**

These Recipients fields include all people and organization values in the **To**, **CC**, and **BCC** correspondence types, making it easier to search for documents that are received by a person or organization.

These fields are not available for:

- **Tools > Reports**
- **Load file templates**

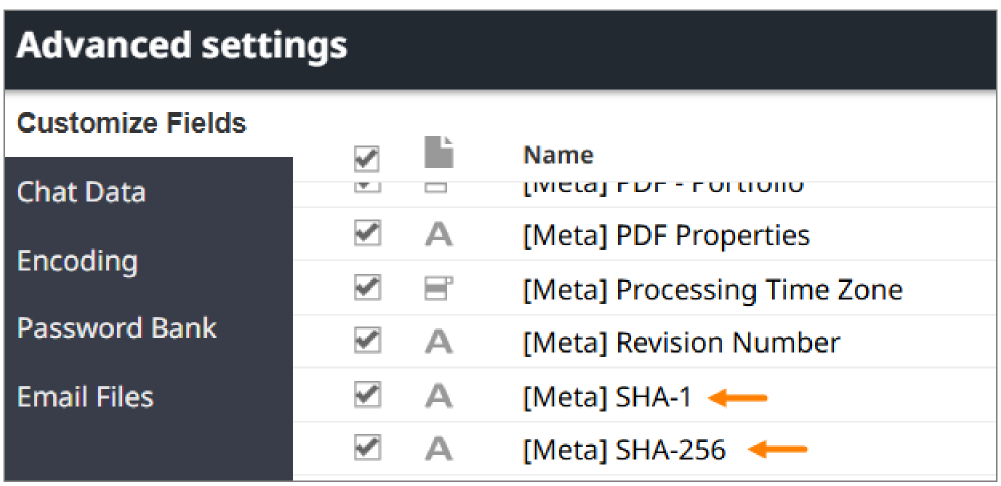
SHA hash values captured in ingestions

SHA-1 and SHA-256 hash values are now available to be included for documents in Discover ingestion jobs.

In the **Ingestions Advanced settings** page, on the **Customize Fields** tab, the following fields are now available:

- **[Meta] SHA-1**
- **[Meta] SHA-256**

Both fields are unchecked by default. Select the check boxes for the fields you want to include for ingested documents.



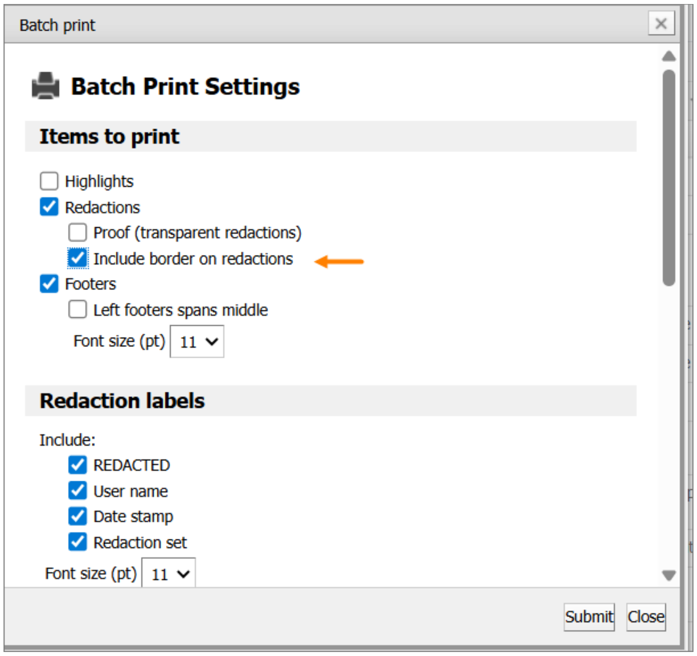
Draw borders around white redactions when batch printing

This release introduces the option to have a visible border drawn around white redactions when you perform a batch print. This allows you to more easily recognize the area that is being redacted, because many documents default to a white background.

To display white redactions with a border:

1. From the **Tools** menu, select **Batch Print.**
2. In **Batch Print Settings**, under **Items to print**, click the **Redactions** check box.
3. Click the **Include border on redactions** check box.

Note: The **Include border on redactions** option is unchecked by default.



Audio transcription: support for new file types

The Transcribe Audio feature supports two new file types:

- .m4a
- .aac

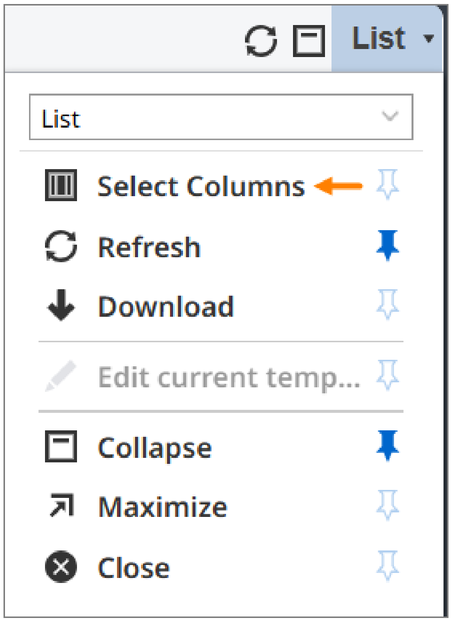
In a case with audio transcription enabled, the **Transcribe Audio** button in the **Audio** pane is enabled when the active doc is .m4a or .aac.

Redactions and Highlights reporting enhancements

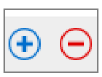
You can generate a report of all redactions and highlights for a document or set of documents, including specific attributes about the redactions and highlights.

To generate the report:

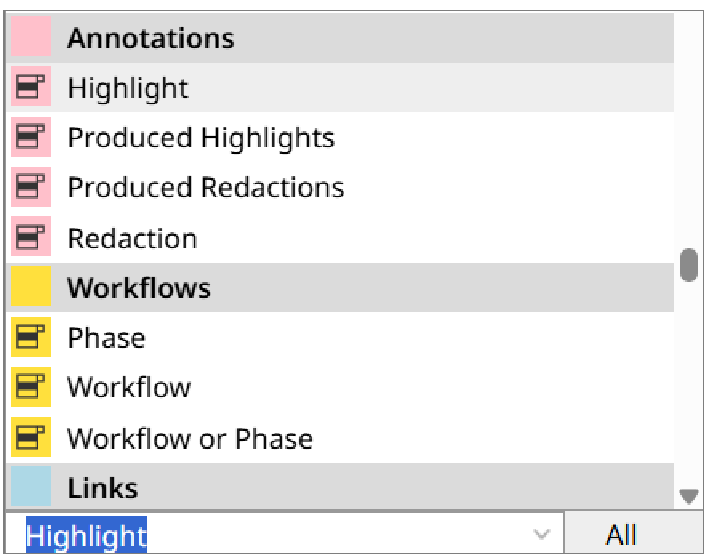
1. Click the arrow next to **List** at the top of the **List** pane to display the menu.
2. Click **Select Columns** to select the attributes to add to the report.



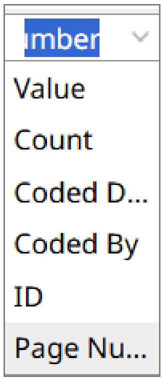
3. In the **Columns** window, select the redactions and highlights you want in your report:
   a. Click **Add** to add a new column to the report.

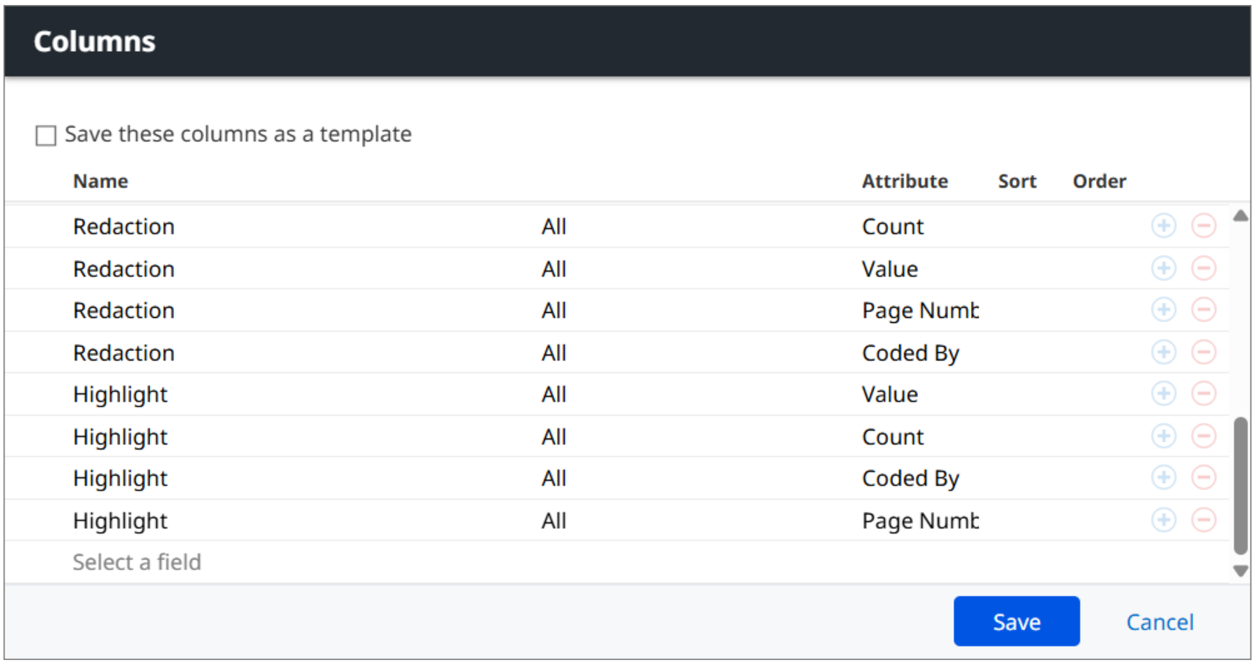
   b. Select the type of annotation from the menu.

   c. Select the attribute of the annotation from the menu. The available attributes are:
      - **Value**
      - **Count**
      - **Coded Date**
      - **Coded By**
      - **ID**
      - **Page Number**

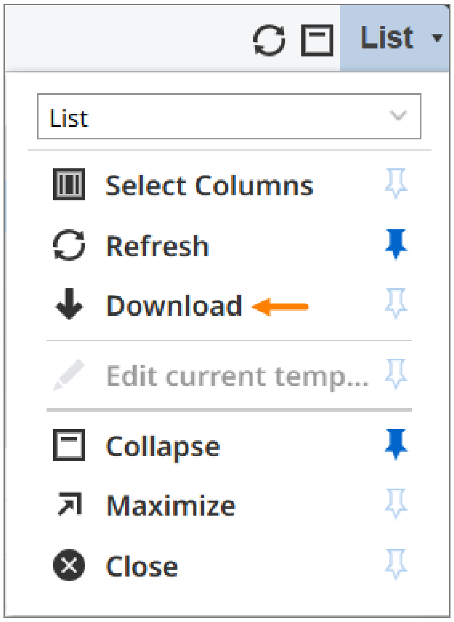


d. Click **Save**.

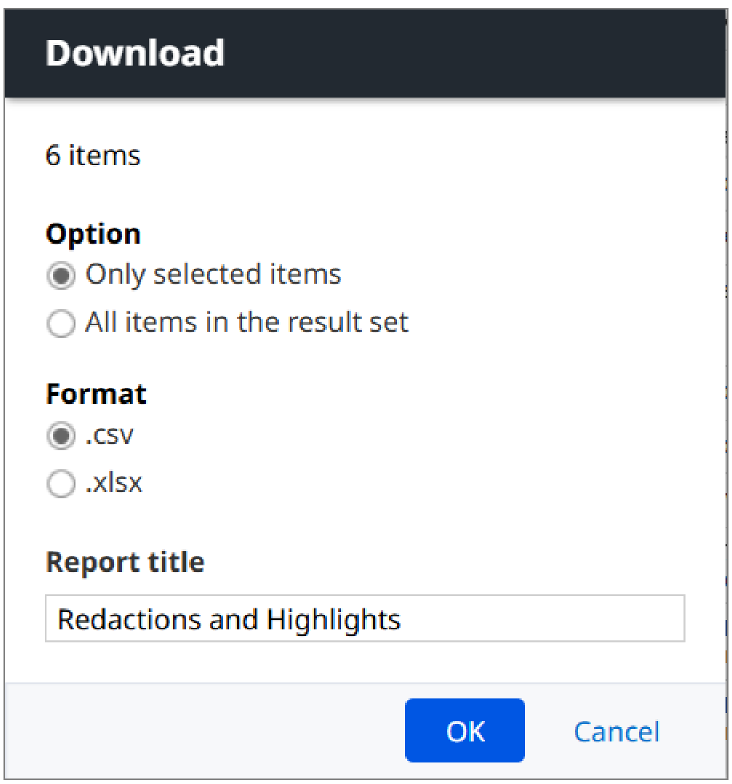


To download the report:

1. Click the arrow next to **List** at the top of the **List** pane to display the menu.
2. Click **Download**.



3. In the **Download** window, click to select either **Only selected items** or **All items in the result set**.
4. Select either **.csv** or **.xlsx** as your download format.
5. Enter a title for the report in the **Report title** field.
6. Click **OK**.



Redaction labels scale with redaction size

Redaction labels now scale to match the size of the redaction. In larger redacted areas, redaction labels grow in point size to fit the redacted area, and in smaller redacted areas the labels shrink in point size to fit the redacted area.

Note: The minimum font size for a redaction label is six points.

Annotations display in a set order

In the **Conditional Coding** pane, redactions and highlights display in the order in which you apply them, with the most recent annotation displayed at the top. Additionally, annotations are applied to productions and exports in the same order, with the most recent annotation displayed at the top.

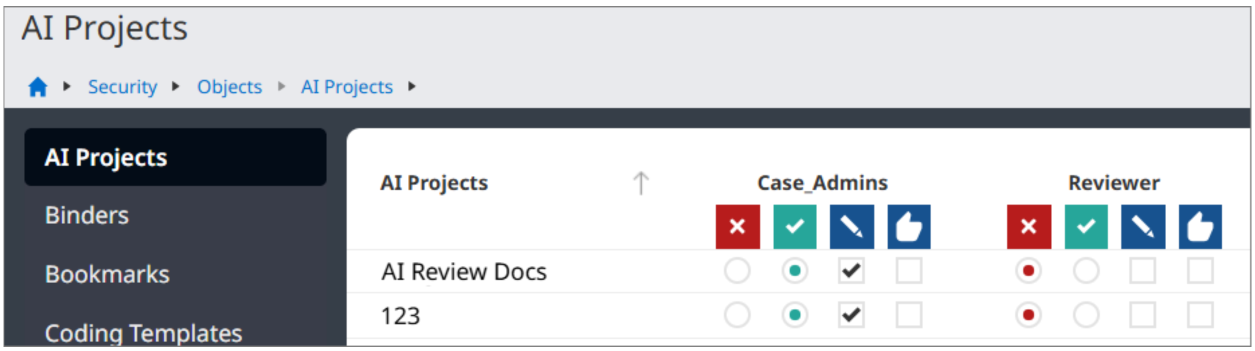
What’s new for case administrators

The following updated features are available to case administrators.

Case Home > Security > Objects > AI Projects

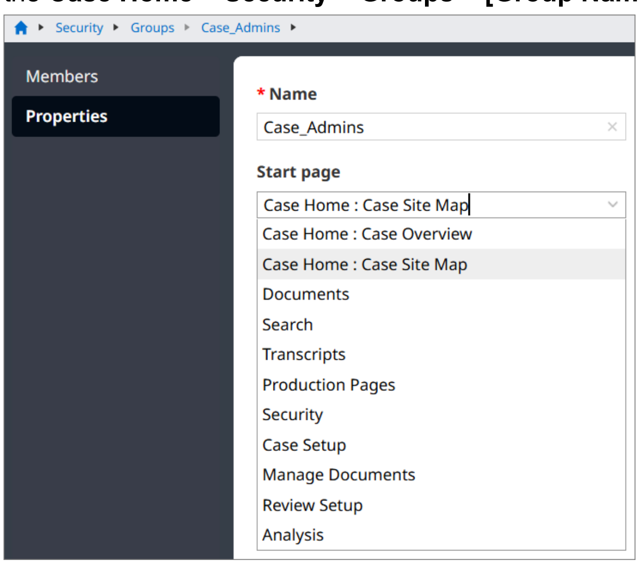
The **Security > Objects** page available to case administrators includes a new object for AI Projects. Click **AI Projects** to set granular permissions for all AI Projects for user groups:

- **Deny** access denies the group access to the AI project.
- **Write** access allows users in the group full access to make changes to the project and all prompts in the project.
- **Allow** access gives users in the group read-only permission to view AI Results in the **Documents** area for all prompt versions in the project.
- **Preferred only** ( ) access gives users in the group read-only permission to view AI Results in the **Documents** area for only the prompt versions that are set as preferred.



Case Overview dashboard as default Start page

The **Case Overview** dashboard is the default landing page for users who are in groups that have either no default page or the **Case Home** page set as their **Start page**, as configured by case administrators on the **Case Home > Security > Groups > [Group Name] > Properties** page.



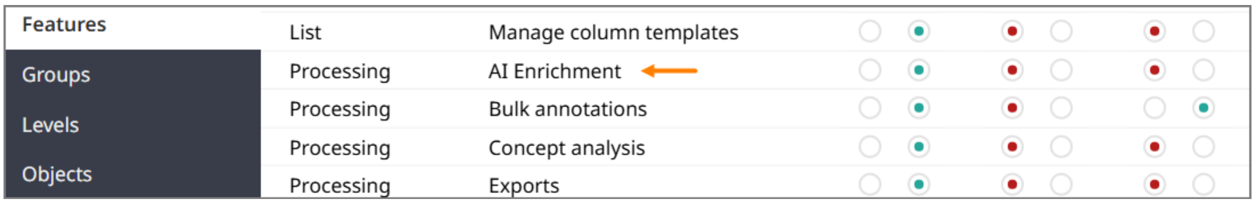
Case administration for AI Enrichment

The following section describes tasks that case administrators perform related to enrichment.

Enable the AI Enrichment feature

To enable the AI Enrichment feature, administrators must grant users access to the **Processing - AI Enrichment** feature.
To grant or deny access to this feature:

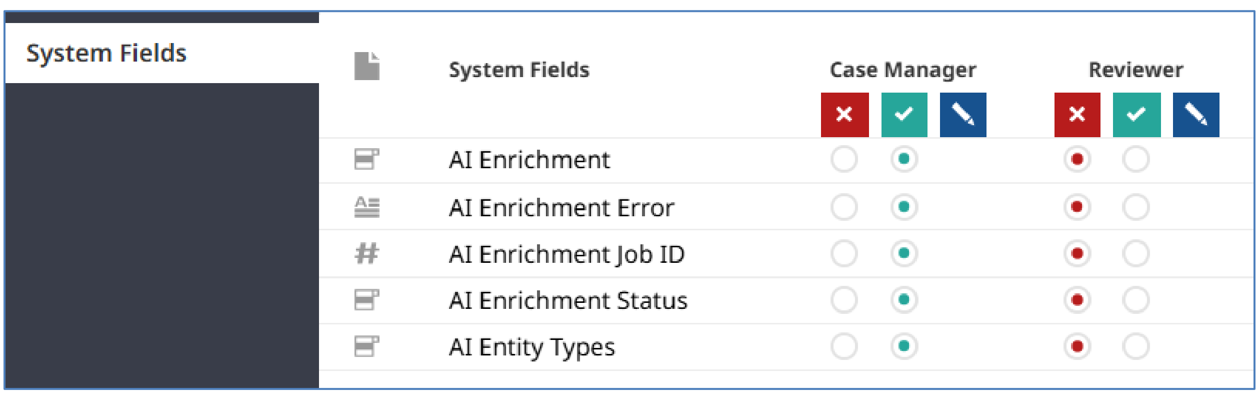
1. On the **Case Home** page, under **Security**, click **Features**.
2. In the row for **Processing – AI Enrichment**, under a group column, click the **Allow** or **Deny** option.



Enable access to the AI Enrichment fields

To enable users to view and search on the AI Enrichment fields, administrators must grant users access to them.
To grant or deny access to these fields:

1. On the **Case Home** page, under **Security**, click **Objects**, then click **System Fields**.
2. In the row for each field, under a group column, click the **Allow** or **Deny** option.

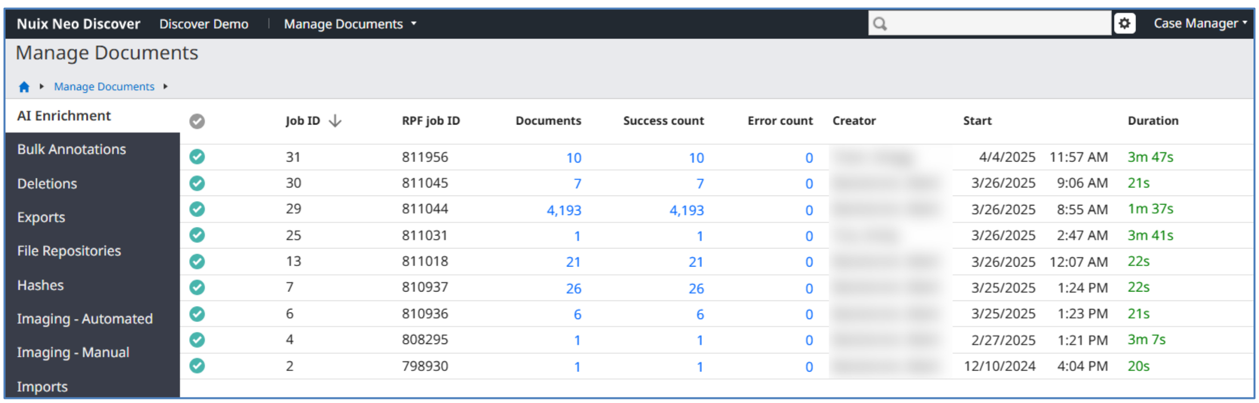


View AI Enrichment job properties

Administrators can view the properties and progress of AI Enrichment jobs on the AI Enrichment jobs page.
To view information about enrichment jobs:

1. On the **Case Home** page, under **Manage Documents**, click **AI Enrichment**.

2. On the **AI Enrichment** tab of the **Manage Documents** page, a list of submitted enrichment jobs appears.



The columns on this tab provide the following information:

- Job status
- Job ID
- RPF job ID
- Number of documents submitted
- Number of documents processed successfully
- Number of errors encountered
- Name of the user who created the job
- Date and time on which the job was started
- Duration of the job

Saved Search Folders Administration

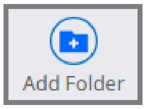
Nuix Neo Discover now supports organizing saved searches in a folder structure. Folders are group-securable and sharable across user groups. Folders can also be made private for an individual user.

Case administrators, and group leaders who have been granted permission, can create and manage folders on the **Case Setup > Saved Searches** page.

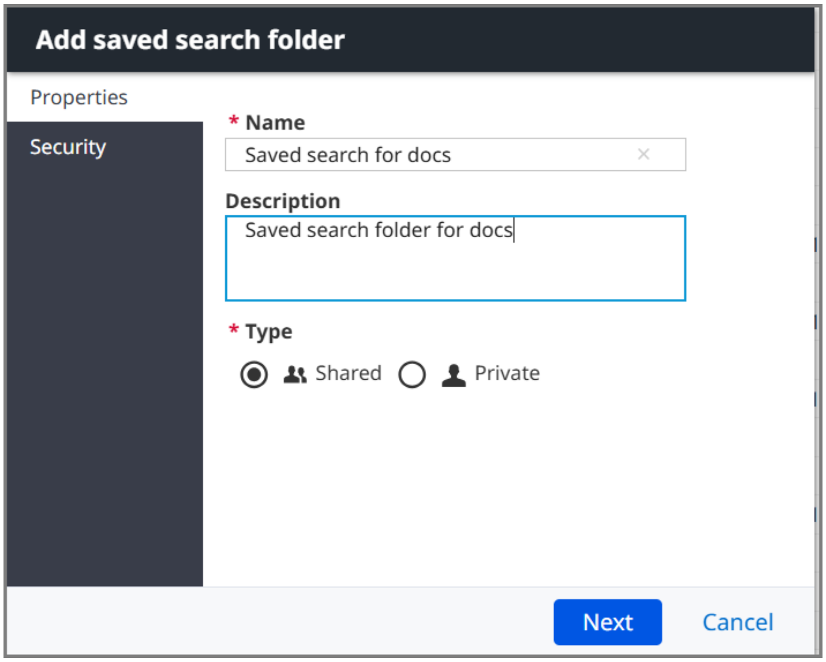
Create a saved search folder

To create a saved search folder:

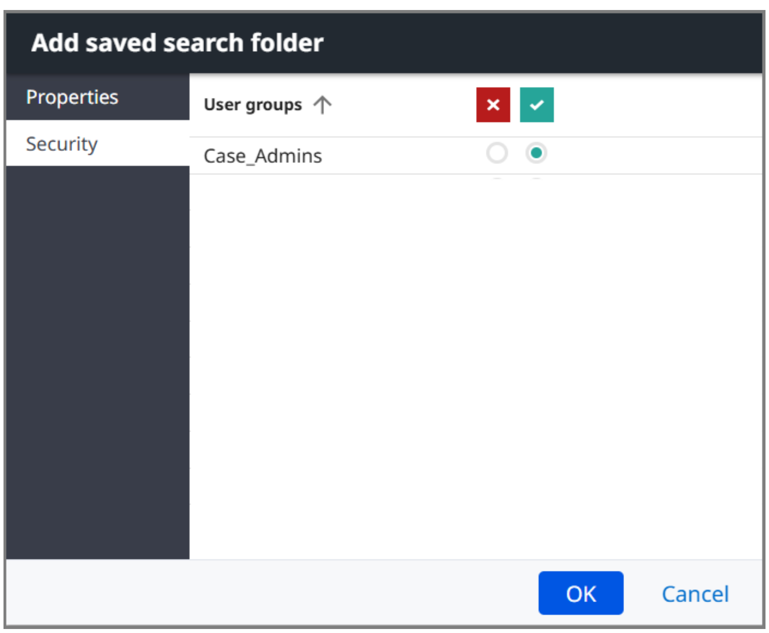
1. On the **Case Setup > Saved Searches** page, click **Add folder** in the top toolbar.



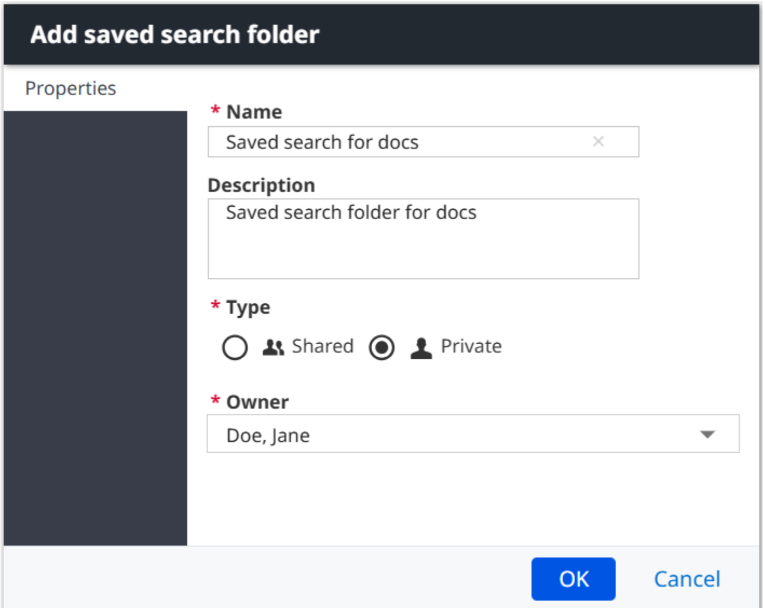
2. In the **Add saved search folder** window, enter a name and an optional description, and set the folder **Type** to **Shared** or **Private**.



3. If creating a **Shared** folder, click **Next.**
4. On the **Security** tab, set the security for user groups to have access to the folder.

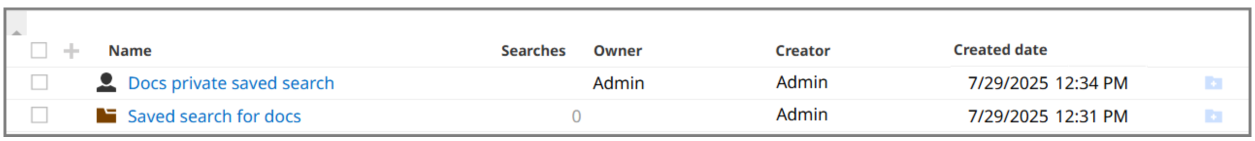


5. Click **OK**.
6. If creating a **Private** folder, select the **Owner.**



7. Click **OK**.

Note: New folders are created at the root level and appear in the grid after you click **OK**. Shared folders display with a folder icon, and private folders display with a person icon.



Use the **Expand/Collapse** button in a folder row to show or hide the child folders and/or searches contained within. Use the **Expand/Collapse** button on the grid header row to expand or collapse all folders.

To create a new child folder, click the in-line **Add folder** button on the right side of a folder row. You can create multiple child folders in the same parent folder. When you click **Add folder**, it opens the **Add saved search folder** window, and you can create the child folder using the same **Create a saved search folder** process described above.

Move a saved search or saved search folder

You can move saved searches and saved search folders within your folder structure.

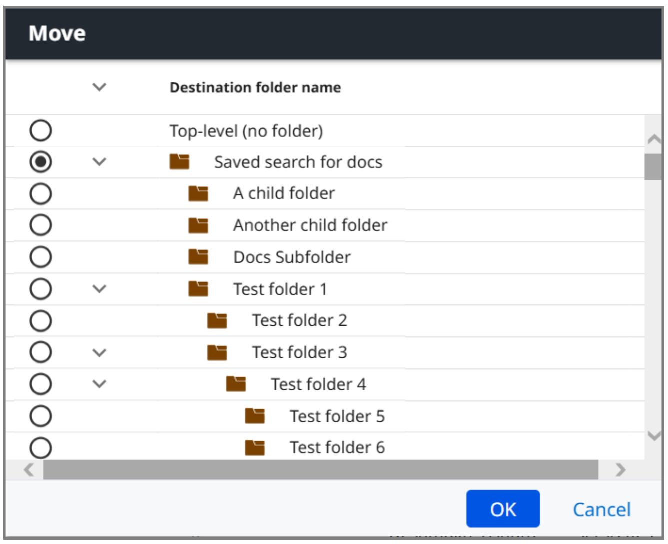
Note: When folders are fully expanded, selecting a parent folder selects all child folders and searches within that folder structure. A folder cannot be moved without also moving all items contained within it.

To move selected items:

1. Click the checkbox next to the search or search folder you want to move.

2. Click **Move.**

3. Select a destination folder.

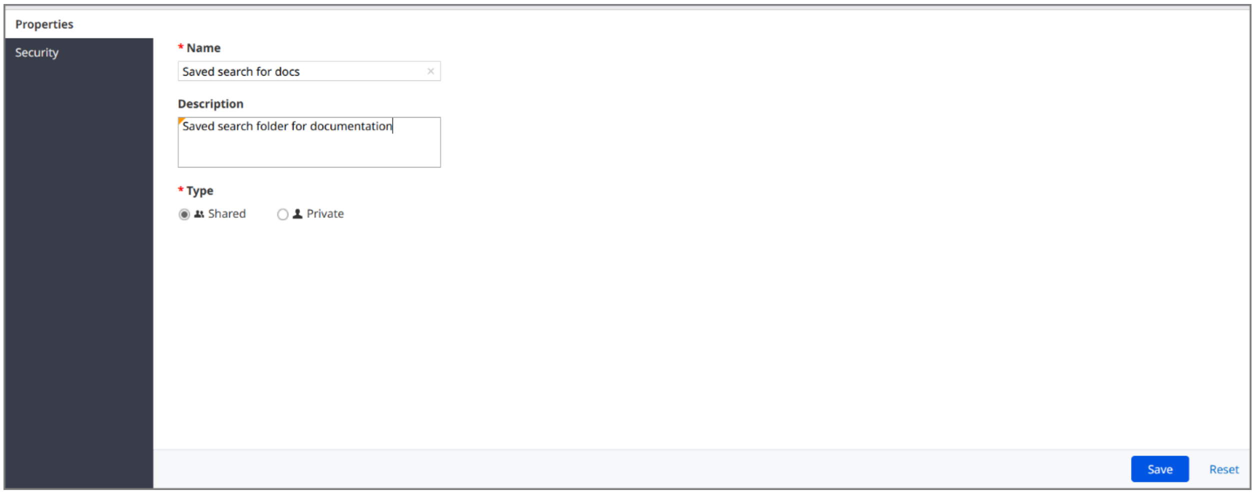


4. Click **OK**.

Edit a saved search folder

To edit the properties of a saved search folder:

1. On the **Case Setup > Saved Searches** page, click the name of the saved search folder you want to edit.
2. On the **Properties** page, edit any of the following:
   - **Name**
   - **Description**
   - **Type:**
     - **Shared**
     - **Private**
3. Click **Save** on the lower right of the page.



Note: The **Save** and **Reset** buttons appear once you begin editing the folder's properties.

Set security for a shared saved search folder

To set security for a shared folder:

1. On the **Case Setup > Saved Searches** page, click the name of a shared folder.
2. In the navigation pane on the left, click **Security**.
3. Depending on which groups you want to set security for, do the following:
   - To change the security for a single user group, hover over the row for the group and then select **Deny** or **Allow**.
   - To change the security for all user groups, select **Deny** or **Allow** in the heading row.

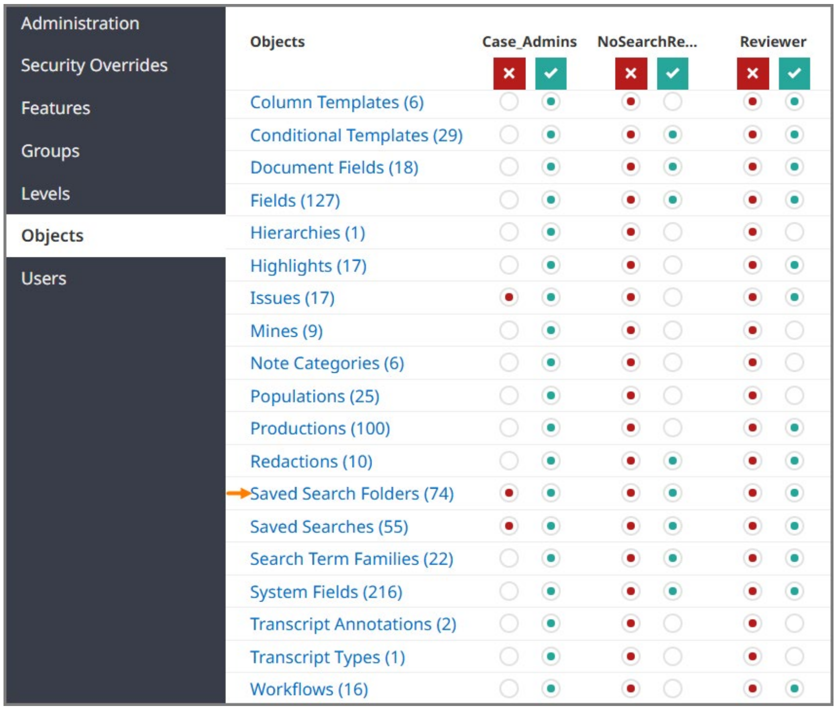
   The following security settings are available.

Permission	Description
Deny 	Denies the group access to the saved search folder.
Allow 	Allows the group access to the saved search folder.

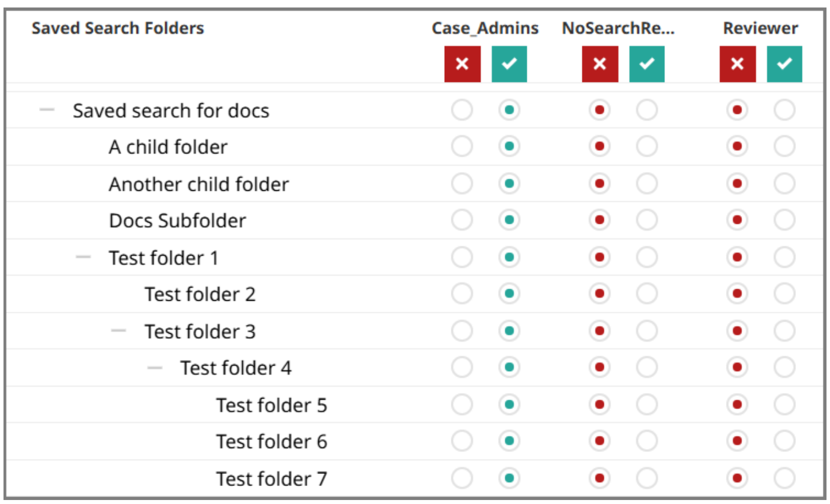
Note: Parent folders that are denied for a user's group, or that are private to another user, prevent access to all contents under that folder for that user even if the child items are allowed for the user's group.

Case administrators can also set security for shared saved search folders in the **Security** area.

1. On the **Security > Objects** page, click **Saved Search Folders**.

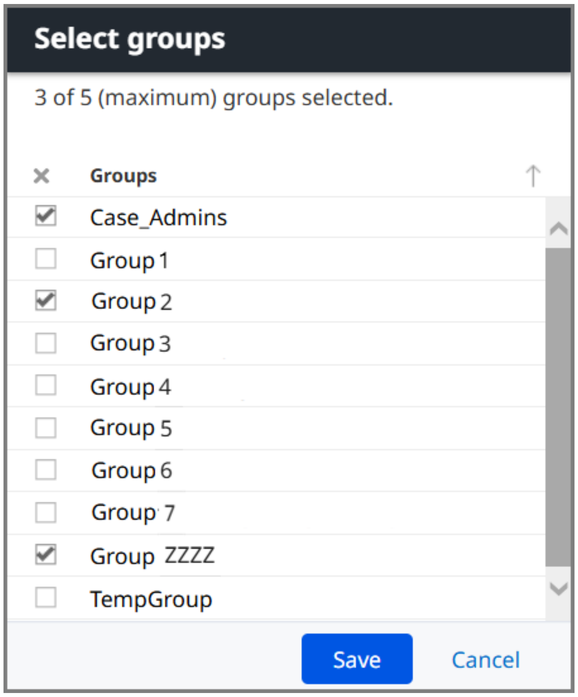


2. In the folder list, click the **+** icon to expand a collapsed folder to show the child folders.



3. Depending on which folders and groups you want to set security for, do the following:
   a. Click the **Select groups** button on the top toolbar to select groups to manage their permissions.

   b. In the **Select Groups** window, select the groups whose permissions you want to manage and click **Save**.



c. To change the group security for a folder, hover over the row for the folder, and then select **Deny** or **Allow** in the column for the group.

- To change the group security for all folders, select **Deny** or **Allow** in the heading row of the column for the group.

Note: Changes to security settings are saved automatically.

Delete a saved search folder or saved search

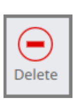
You can delete saved searches and saved search folders within your folder structure.

Note: When folders are fully expanded, selecting a parent folder selects all child folders and searches within that folder structure. A folder cannot be deleted without also deleting all items contained within it.

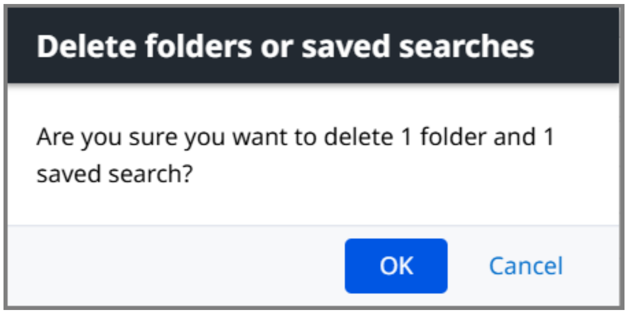
To delete selected items:

1. Click the checkbox next to the search or search folder you want to delete.

2. Click **Delete**.



3. In the confirmation window, click **OK** to confirm the deletion.



Enable Unitization

To enable the Unitization feature, administrators must grant users access to the **Document – Unitize Documents** feature.

To grant or deny access to this feature:

1. On the **Case Home** page, under **Security**, click **Features**.
2. In the row for **Document – Unitize Documents**, under a group column, click the **Allow** or **Deny** option.

Document	Correct audio transcription
Document	Translate
Document	Unitize Documents
List	Manage column templates

Update of NIST hashes in Ingestions

The latest NIST Reference Data Set of Files hash set available for this version of Nuix Neo Discover is the March 2025 hash set.

Auto-populate next available number in Productions

When you clone a production that uses standard numbering, the **Clone** settings auto-populate the **Standard start number** field with the next available start number for the prefix.

When you clone a production that uses custom numbering, the **Clone** settings auto-populate the **Produced document label** and **Produced page label** fields with the next available start numbers for the configured labels.

Native rules for Base Document ID productions

This release introduces two new rules for productions using Base Document ID numbering that allow you to produce native files and redacted native Excel and audio files.

Production Rules

When creating a production with the **Use base document IDs** numbering attribute, two new rules are available on the **Production Rules** page to support producing native files for documents in your production. This includes producing redacted native Excel or audio files for documents that had redactions applied through the XLerator or Audio workspace panes.

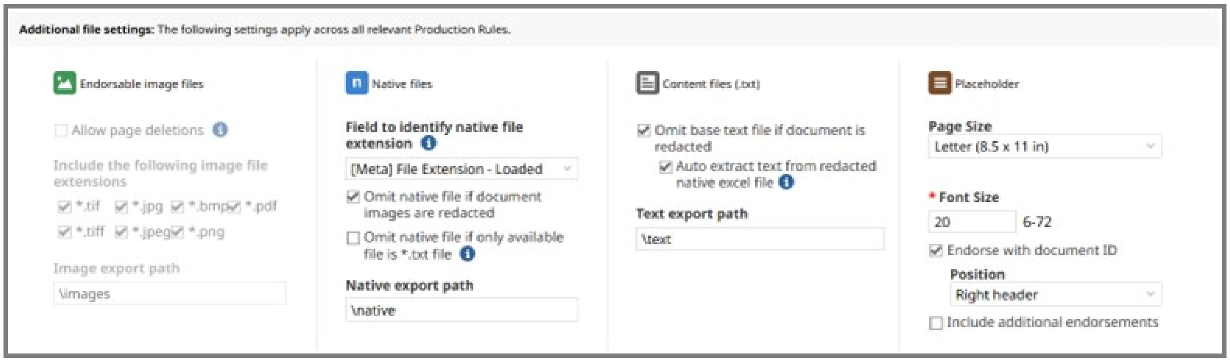
The new rules include the following options:

- **Native with custom placeholder**: The native file and a custom placeholder PDF image are produced for documents in this rule.
- **Native only**: The native file is produced for documents in this rule.

You can add more than one rule to your production and use binders or issues to define exception populations that can be used to target documents to a specific rule. In the **Content files (.txt)** column, you can select an option other than **No text** in the row for a rule to include .txt files for the documents in that rule. If you are using the **Native with custom placeholder** rule, click into the **Placeholder text** column to enter the text to be displayed in the center of the placeholder page.

Rule	Content files (.txt)	Exception population	Placeholder text	Documents
Pages and content	No text	DEFAULT		1
Native Only	Extracted text only	Native only		2
Native with custom placeholder	No text	Native w placeholder	Produced as native only	2

At the bottom of the **Production Rules** page, under **Additional file settings**, settings are enabled or disabled based on your production rule choices.



- For rules that include native files for documents, you can identify the extensions of those native files by selecting a value in the **Field to identify native file extension** setting.
- The **Omit native file if document images are redacted** check box is selected by default, allowing you to automatically exclude native files for documents with redactions.

  Note: This setting, when checked, does not exclude producing redacted native files for documents that have native Excel files redacted with XLerator or native audio files with redactions applied in the **Audio** pane.

- If you have configured any of the production rules to include .txt files, the **Omit text file if document is redacted** check box is selected by default, allowing you to automatically exclude text files for redacted documents.
  - To override the **Omit text file if document is redacted** setting and include .txt files with extracted text from redacted native Excel files in your production, select the option to **Auto extract text from redacted native excel file.**
- The **Placeholder** section is enabled if your production includes the **Native with custom placeholder** rule, allowing you to select options to endorse the placeholder with the base document ID and/or with additional custom endorsements as configured on the **Endorsements** page of the production.

Quality Control

On the **Quality Control** page, there is a new quality control check that is applied when any of the rules that produce images are included in a production.

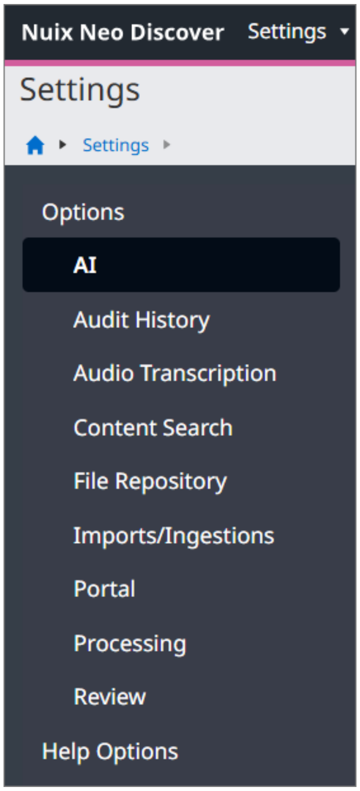
Quality control check	When the check is enabled	Results
To be produced as image but have annotations applied on native file	Documents in the unlocked production with XLerator or Audio redactions applied are identified to be produced as images when they are part of a **Pages and content, Pages and content with endorsement, Pages only, Pages only with endorsement, Image only,** or **Image only with endorsement** population.	**Returns successful message if:** None of the documents to be produced as images have XLerator or Audio redactions applied on the native file. **Returns exception message if:** At least one of the documents in a rule for producing images has XLerator or Audio redactions applied on the native file.

What’s new for portal administrators

The following updated features are available to portal administrators.

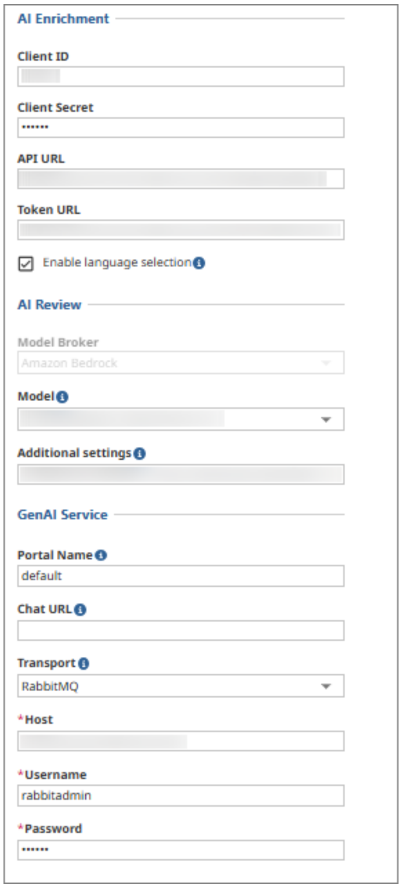
Redesign of Portal Management > Settings > Portal Options page

This release introduces a redesign of the **Portal Options** page.

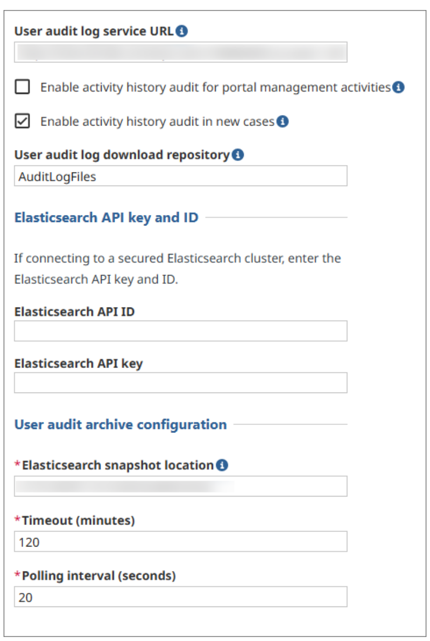


Configuration options now appear in the following categories:

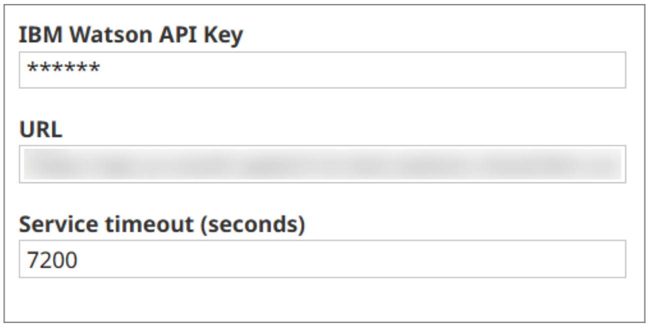
- AI



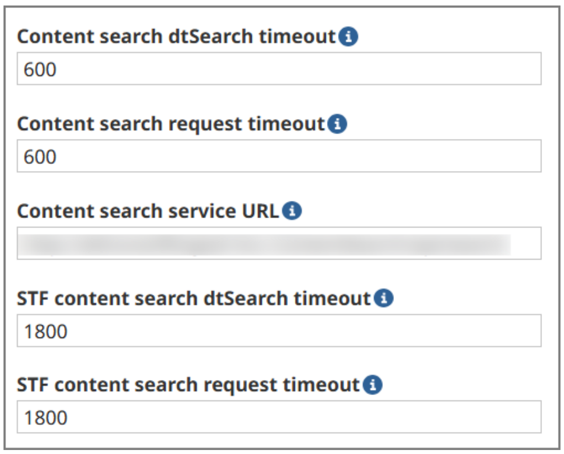
- Audit History



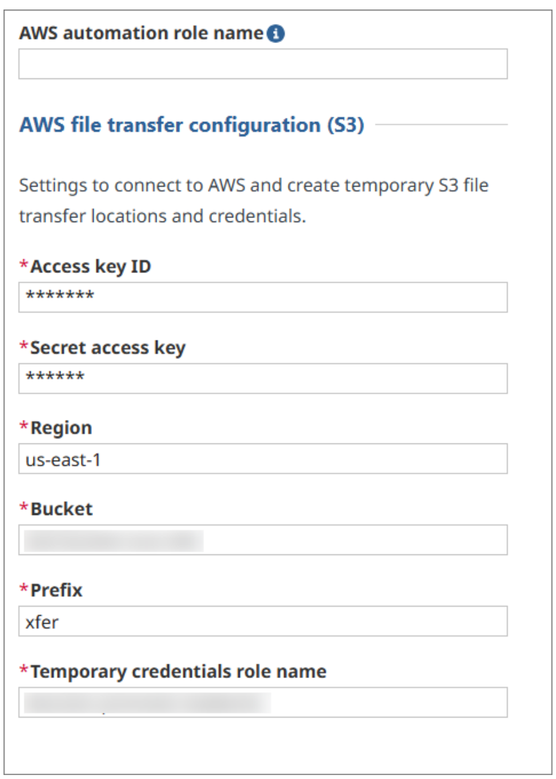
- Audio Transcription



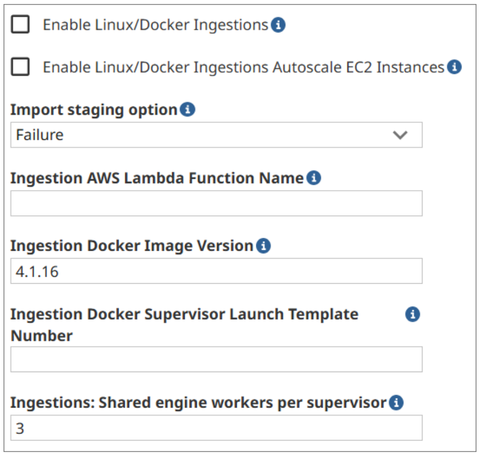
- Content Search



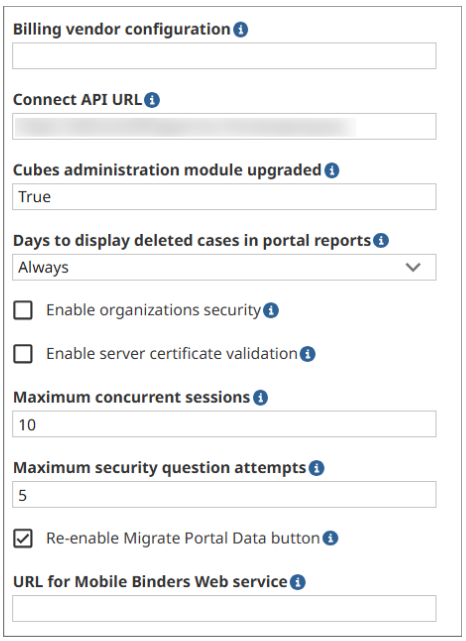
- File Repository



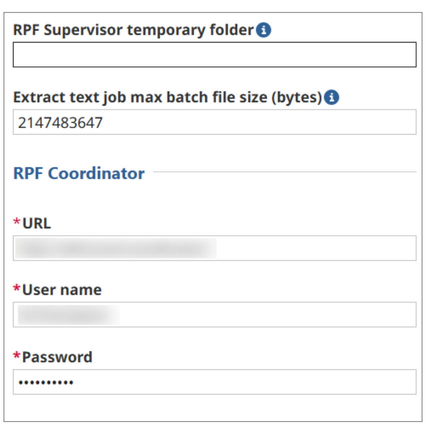
- Imports/Ingestions



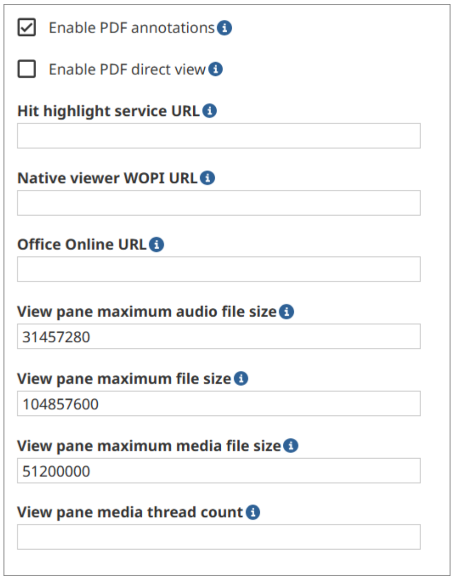
- Portal



- Processing

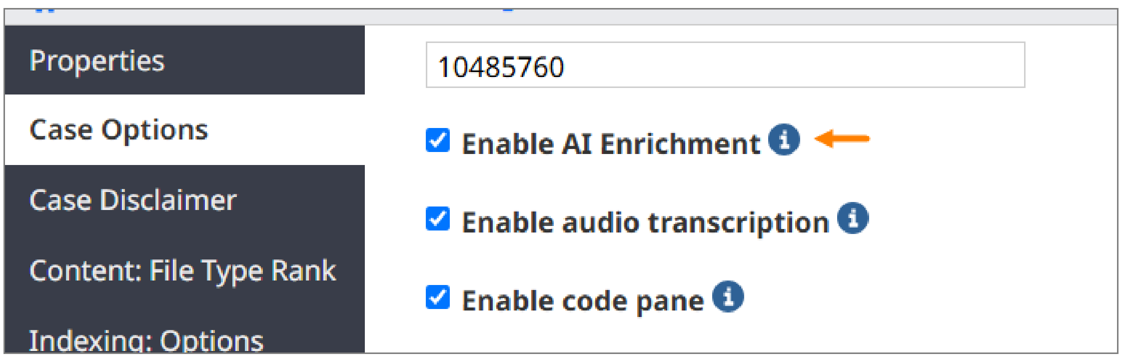


- Review



Enable AI Enrichment

Before users can submit documents for enrichment, portal administrators must enable AI Enrichment for a case. To enable the AI Enrichment feature, navigate to **Portal Management > Cases and Servers > [case name] > Case Options** and check the box next to **Enable AI Enrichment**.

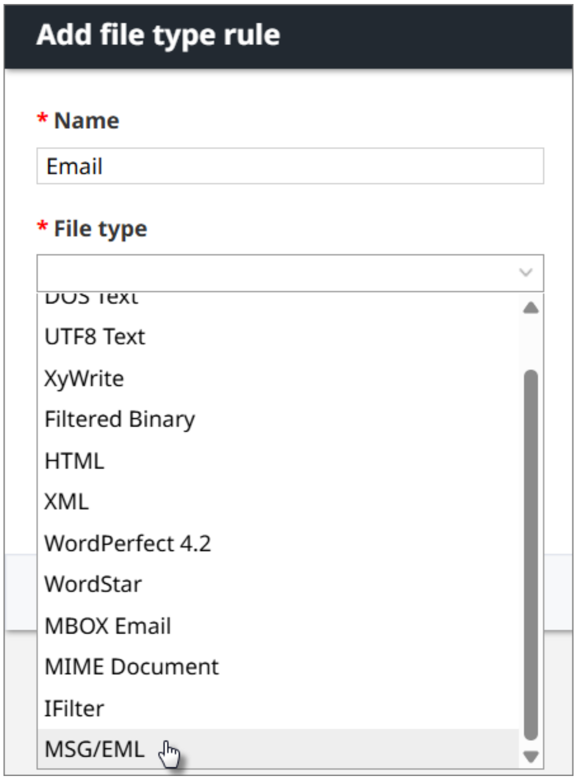


Treat MSGs and attachments separately for indexing and viewing

Portal indexing now allows MSG files and attachments to be used for file type filtering. On the **Indexing: File Type Rules** page, you can select **MSG/EML** as the file type.

You can select the file type for portal indexing on the **Portal Home > Portal Management > Settings > Indexing: File Type Rules** page and for case-specific indexing on the **Portal Home > Portal Management > Cases and Servers > [case name] > Indexing: File Type Rules** page.

The MSG/EML rule applies to EML and MSG documents when ingested with the **MSG/EML with attachments** ingestion setting. When this file type rule is in place, the indexing of emails is limited to the email only and does not include attachment text. Attachments are still indexed as separate documents.



Note: For indexing setting changes to take effect for a case, you must rebuild the indexes for that case.

What’s new for system administrators

The following new features are available to system administrators.

Restrict portal administrators from administering users

System administrators can restrict portal administrators from administering users.

To enable this restriction, select **Deny** for the **User Administration** setting on the **Security** tab for a portal administrator. The default setting is to allow user administration.

If you select **Deny**, the following restrictions apply:

- The Portal Administrator cannot view or access **Portal Management > User Administration** from either the **Portal Home** page or from the **Home** icon on the **Portal Home** page.
- The portal administrator cannot view or access any of the User Administration subpages:
    - **Portal Management > User Administration > Users**
    - **Portal Management > User Administration > Deleted Users**

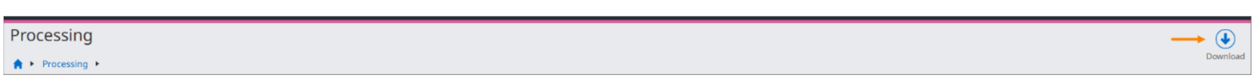
RPF event logs

The **Logs** page on the **Portal Management > Processing** page displays event logs from all RPF supervisors and the RPF coordinator. This allows you to view all application log events in one location. On the **Logs** page:

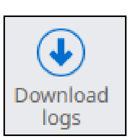
- View environmental issues across servers, such as network or storage outages or locked service accounts.
- Sort and filter options.
- Search using keywords.
- Download logs for further analysis.

To download the report in .csv format:

1. On the **Portal Home** page, under **Portal Management**, click **Processing**.
2. In the navigation pane, click **Logs**.
3. Click **Download**.



A **Download logs** button also appears on the **Portal Management > Processing > Supervisors > [Supervisor name] > Logs** page.



Deprecation Notice: Ending Support for AWS OpenSearch for Discover User Auditing

On January 1, 2026, Nuix discontinued support for AWS OpenSearch for User Auditing in Discover 10.21, 10.20,10.19, 10.18, and 10.17.

This decision stems from the increasing divergence between OpenSearch and Elasticsearch. Although OpenSearch began as a fork of Elasticsearch 7.10, the two have since taken separate paths, resulting in growing incompatibilities. Supporting both platforms has become increasingly complex and resource intensive.

To ensure we can focus on delivering consistent, high-quality support, Nuix will continue to prioritize Elasticsearch moving forward.

If you are currently using OpenSearch successfully, it should continue to work, but no further development or testing will be conducted. Nuix recommends migrating to Elasticsearch 7.17.x. For assistance migrating, please contact Nuix Discover On-Premise professional services.

End of support for Windows Server 2019 and SQL Server 2017/2019

Nuix Discover discontinued support for Windows SQL Server 2017 on January 1, 2026. Nuix Discover support for Windows Server 2019 and SQL Server 2019 will be discontinued on July 1, 2026.
Nuix will continue to support releases of Nuix Discover on the operating systems and versions of SQL that are actively supported at the time of the Nuix release. For example, Nuix Discover 10.21 was released before October 1, 2026. An installation of Nuix Discover 10.21 on Windows 2019/SQL 2017 will be supported for as long as Discover 10.21 is supported.

Support for Windows Server 2025 is planned for the next release of Nuix Neo Discover.

Elasticsearch support

Nuix Neo Discover supports ElasticSearch 7.9.x or 7.13x or 7.16x or 7.17x or 8.14x. Nuix Neo Discover does not support AWS OpenSearch.

Additional information

Note the following additional information.

How to contact Nuix Support

If you need assistance, submit a ticket on the Nuix Support Portal, located at https://nuix.service-now.com/support. If you do not have an account for the Nuix Support Portal, you can request one on the site.

Installation and deployment notes

For detailed information about client and system requirements, as well as upgrade and installation instructions for this release, see the following documents on the Nuix Customer Portal.

- *Nuix Discover - Client Computer Requirements*
- *Nuix Discover - Hardware and System Requirements*
- *Nuix Discover - Upgrade Checklist*
- *Nuix Discover - Installation and Configuration Guide*

Nuix Discover requires .NET Runtime 8.0.4 or later

The new Nuix Discover case-to-case migration feature requires the latest version of .NET Runtime 8.0. The link to the .NET Runtime 8.0.4 (or later) installer will be available on the quarterly release page for Nuix Discover on the Nuix Customer Portal.
You also can download the .NET Runtime 8.0.10 installer now from the .NET Runtime section on this page.

.NET Runtime 8.0.10

The .NET Runtime contains just the components needed to run a console app. Typically, you'd also install either the ASP.NET Core Runtime or .NET Desktop Runtime.

OS	Installers	Binaries
Linux	Package manager instructions	Arm32 | Arm32 Alpine | Arm64 | Arm64 Alpine | x64 | x64 Alpine
macOS	Arm64 | x64	Arm64 | x64
Windows	x64 | x86 | Arm64 | winget instructions	x64 | x86 | Arm64
All	dotnet-install scripts	

Supported upgrade paths

You can upgrade the following versions of Ringtail Legal and Ringtail to this version of Nuix Neo Discover 100.x:

- Ringtail 8.0.1, 8.1, 8.2, 8.3, 8.3.1, 8.3.2, 8.4, 8.4.2, 8.5, 8.6
- Ringtail Legal 1.0.58

For versions of Ringtail Legal earlier than 1.0.57, you must first upgrade to Ringtail Legal 1.0.58, and then upgrade to Nuix Discover 100.x.

Note: When upgrading to Ringtail 8.6 or later from an earlier version, you must request an updated license.

If you need assistance, submit a ticket on the Nuix Support Portal, located at https://nuix.service-now.com/support. If you do not have an account for the Nuix Support Portal, you can request one on the site.

Nuix Discover support lifecycle for biweekly and quarterly releases

Note the following support lifecycle for quarterly releases:

- **Quarterly releases**
  - Nuix supports the last four quarterly releases to on-premises clients.
    - **Example:** 10.21, 10.20, 10.19, 10.18

Note: Nuix Discover provides service packs for quarterly releases for up to the latest four releases and for one year from the initial release date of the quarterly release.

Service packs for biweekly releases are provided for the four most recent biweekly releases.

For earlier releases that are no longer eligible for service packs, the Nuix Support Team provides best-effort support.

If you need assistance, submit a ticket on the Nuix Support Portal, located at https://nuix.service-now.com/support. If you do not have an account for the Nuix Support Portal, you can request one on the site.

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

The Nuix Discover support lifecycle for Microsoft products is communicated annually. For additional information about the Microsoft Lifecycle Policy, go to https://support.microsoft.com/en-us/lifecycle/search.

Note: Nuix Discover support for Windows Server 2019 and SQL Server 2019 for new installations will end on July 1, 2026.

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

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

For detailed information about client computer requirements, see the *Nuix Discover - Client Computer Requirements* guide for this release. For detailed system and hardware requirements, see the *Nuix Discover - Hardware and System Requirements* guide for this release. These guides are available on the Nuix Customer Portal.

Disclaimers

Nuix Discover version 100.0.005