

Veritas eDiscovery Platform™

Release Notes

9.0.1

Veritas eDiscovery Platform™ : *Release Notes 9.0.1*

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Overview

These release notes describe updates related to installation, upgrades, and operational considerations, including resolved and known issues related to Veritas eDiscovery Platform software.

Detailed information on how to use the appliance and features products can be found in the product documentation for that feature.

9.0.1 Installation & Upgrade Requirements

This section provides critical information necessary before installing or upgrading your system to Veritas eDiscovery Platform 9.0.1.

What Files to Download?

Please sign in and use the Veritas Support portal for downloading product software, licensing, and support: https://www.veritas.com/content/support/en_US/eDiscoveryPlatform.html

- For cumulative hotfix information and downloads, visit the eDiscovery Platform support site: https://www.veritas.com/support/en_US/article.100039146
- For information on how to obtain license key and installation download: https://www.veritas.com/support/en_US/article.000100418

A number of Veritas eDiscovery Platform installation files are available from the Veritas Support Portal Downloads area. Use the information below to help you choose the appropriate set of files to download for your license and deployment.

If you are upgrading to 9.0.1, use the following incremental installer (for the Master node and all nodes in the cluster, the Confirmation Server and the Utility Node):

- Veritas_eDiscovery_Platform_v90_CHF1_Win_EN_Fix1.zip

If you are upgrading from a previous version, run the full product installer.

- Full Product Installer
Veritas_eDiscovery_Platform_Installer_9.0_Win_EN.zip
- Legal Hold Installer (only applicable if you are licensed for the Legal Hold module):
Veritas_eDiscovery_Platform_ConfServer_Installer_9.0_Win_EN.zip
- Utility Node Installer (only applicable if you are licensed for the Review, Redaction and Production module)
Veritas_eDiscovery_Platform_UtilityNode_Installer_9.0_Win_EN.zip

Install/Upgrade Instructions

Veritas eDiscovery Platform 9.0.1 supports the following upgrade path:

- Veritas eDiscovery Platform Release 9.0

If you are running above listed version, you must run the incremental installer to install 9.0.1 on the following:

- Master Node and all other Nodes in the cluster
- Confirmation Server
Note: If you are using a dedicated Confirmation Server, then you must run the 9.0.1 incremental installer on the Confirmation Server.
- Utility Node

eDiscovery Platform does not support release upgrades that extend past a previous version release (for example, you cannot perform a direct upgrade from 8.2 to 9.0.1). Instead, eDiscovery Platform requires intermediary upgrades to update the product to the latest version. In the case of 9.0.1, your system must be running 9.0 before running and applying the 9.0.1 incremental install.

IMPORTANT! You may need to restart your system after upgrading to 9.0.1, if prompted.

Distributed Architecture Deployment Updates

If you are using a distributed architecture deployment:

The 9.0.1 installation retains the product version as 9.0.0.7.0.

All nodes in a cluster must be upgraded to the same version; otherwise nodes will not be available. To do this:

1. Stop all services on all nodes.
2. Install 9.0.1 on the Master node first.
3. Continue to install 9.0.1 on all other nodes in the cluster.

For more information about distributed architecture system requirements, refer to the *Distributed Architecture Deployment Guide*.

Product Documentation

For more information on supported upgrade paths, refer to:

https://www.veritas.com/support/en_US/article.000095769

For more information on the supported operating systems and third-party applications, refer to: https://www.veritas.com/support/en_US/article.000019811

9.0 Release Notes and product documentation:

https://www.veritas.com/support/en_US/article.100040616

9.0 Late Breaking News: https://www.veritas.com/support/en_US/article.100041303

9.0.1 product documentation: https://www.veritas.com/support/en_US/article.100040616

For information on performance improvements on Utility Nodes machines, see the tech notes:

- [Optimizing Utility Nodes performance by lowering the IGC threads](#)
- [Optimizing performance of Utility Nodes with 8GB RAM by setting Tomcat process heap size](#)

Need Help?

Customer Support Portal: https://www.veritas.com/support/en_US.html

Contact Numbers: https://www.veritas.com/content/support/en_US/contact-us.html

Note: Access to some areas of the Support Portal may require a Veritas Account. If you do not already have one, register for a new Veritas Account from the Support Portal Licensing area.

New in Version 9.0.1

Header-based single sign-on authentication for Legal Hold notices

Earlier eDiscovery Platform supported integrated Windows authentication (IWA) single sign-on (SSO) for Legal Hold authentication. Starting with 9.0.1, header-based authentication single sign-on is also supported for Legal Hold authentication. If header-based authentication is enabled, the custom HTTP header with the username provided by the configured Identity Service Provider (ISP) is used for login through a reverse proxy. The custodian is directed to the Legal Hold notice without the need to enter login credentials. For details, see 9.0.1 Legal Hold User guide.

Support for IPv6 address formats

Earlier, eDiscovery Platform only supported IPv4 address format. Starting with 9.0.1, end-to-end workflow of eDiscovery Platform supports IP addresses in IPv4, IPv6, and dual stack mode. For details, see 9.0.1 Distributed Architecture Deployment Guide and System Administration Guide.

Onsite collection without user intervention

9.0.1 provides a programmatic way to run OnSite Collector in hidden mode without the need of any user intervention. Users can use a command as shown in the following example to launch an OnSite Collector in hidden mode:

```
D:\Clearwell\OnSiteCollector\exe\scandir\OnSiteCollector.exe -h
```

where, <D:\Clearwell\OnSiteCollector> is the folder where OnSite Collector is installed.

For details, see 9.0.1 OnSite Collections Reference Card.

Configurable option to process partially converted OST files

9.0.1 provides a way to process the partially converted OST files. When the **esa.ost2.conversion_partial_success** property is set to "true" using **System > Support Features > Property Browser**, the partially converted OST files are processed successfully instead of sending them to the *OST_Partial_ConvertedFiles* directory. By default, the value of this property is set to "false" so that the existing workflow is retained where the partially converted OST files are copied to the *OST_Partial_ConvertedFiles* directory. For details, see 9.0.1 Case Administration Guide.

Configurable option to generate a slip sheet for excluded items

Earlier a slip sheet was generated by default for the items of the document family that are not a part of the production instead of completely skipping them. Starting with 9.0.1, users get a choice whether to include or exclude a slip sheet while setting up production folders. For details, see 9.0.1 Case Administration Guide.

Improvements in archive filtering for Enterprise Vault Collection, Search, and Hold tasks

9.0.1 provides an enhancement in archive selection while creating Enterprise Vault Collection, Search, or Hold tasks. When archives are deleted on Enterprise Vault after you perform the Enterprise Vault discovery on eDiscovery Platform, these deleted archives do not appear in the Archive Picker while selecting archives to add to the Collection, Search, or Hold task. This enhancement prevents the Collection, Search, or Hold tasks resulting into Partial Success when vault store is selected instead of individual archives as the deleted archives are correctly filtered from the vault store. For details, see 9.0.1 Identification and Collection guide.

Enhancements in collection set management

9.0.1 provides several improvements in collection set creation and management.

While creating a collection set, you can hover on the task name to see its identifying information that helps to distinguish the task from the other tasks in the list. You can see "Task description: Task source: Size" if description is present in the collection task. If description for the collection task is not available, then "Task ID: Task source: Size" is displayed.

Earlier, you could create collection sets of either "Metadata only" or "Content and metadata" type. Now, "Content only" collection sets can also be created. Data for this collection set can only be exported in native format. The data is arranged in an appropriate hierarchy with respect to task, custodian, and source. The collection sets created using the "Content only" option do not appear in the list of collection sets on the **Processing > Sources and Pre-Processing > Manage Sources** screen. If you need to process the "Content only" collection sets, then you can add the data of these collection sets for processing under **Processing > Sources and Pre-Processing > Manage Sources > Add Case Folder Source** screen.

Earlier, the default option on the Create Collection Set screen was "Metadata only." Now you can change the default collection set type by setting the `esa.icp.collection.set.create.default_type` property using the Property Browser. The values can be set to set the default collection set type to METADATA_ONLY, METADATA_AND_CONTENT, or CONTENT_ONLY.

For details, see 9.0.1 Identification and Collection guide.

Support for collection of additional data sources

9.0.1 supports collection of FileShare hosted on Windows Server 2016. This release also supports direct FileShare collection of Microsoft Office 2016 data. The supported Microsoft Office 2016 file types are OneNote 2016, Word 2016 Documents, Excel 2016 Spreadsheets, and PowerPoint 2016 Presentations.

Users may now download a zip file in DA environment

Previously users in a Distributed Architecture environment were not able to download requested export packages, such as production, metadata, and native exports. The user was given an info bubble with a location for the zipped file. In a DA environment, not all users will have permissions allowing them access to the designated location on the specified appliance.

In this fix, users will have a choice. Selecting the Create downloadable (zip) file radio button on the Metadata tab on the export options window gives the user the option to download the export package, instead of accessing it from the specified appliance location. For details, see the Export and Production Guide.

Operational Notes

Cannot add new worker node to DA after MySQL password is changed (ESA-45191): This is an issue encountered when the user changes database passwords on the master and tries to update the worker node. The user needs to do the following:

1. Stop ESA services on the worker.
2. Use Password Manager to change passwords on worker to match the passwords on master.
3. Start ESA services on the worker.
4. Restart ESA services on the worker.
5. Add the worker on the master on the Appliances screen.

For instructions, see https://www.veritas.com/support/en_US/article.000116715.

SLF license upload fails for Windows 10 and Internet Explorer 11 (ESA-48432): When eDiscovery Platform is accessed from a Windows 10 machine using Internet Explorer 11, uploading an SLF license file fails on the **System > License > Update License** screen. As a workaround, administrator can access their eDiscovery Platform appliance using Windows 7 or remote desktop (RDP) to server, and then upload the SLF license file from the appliance. This issue is not observed on Windows 7 with any version of Internet Explorer.

Known Issues

Production export fails when the full path to a file contains more than 260 characters (ESA-50449): Production export fails on IGC for files having full source path or full target path longer than 260 characters. The file name characters are also included in the 260 characters length. This limitation is because IGC supports file paths with a maximum of 260 characters only.

Fixed in Version 9.0.1

Infrastructure

Bulk Redaction job ends in Partial Success due to a 'file in use' error on one or more documents (ESA-49586): This fix resolved an issue where a Bulk Redaction job was resulting in Partial Success status due to an error: *"The process cannot access the file because it is being used by another process"*. With this fix, the Bulk Redaction job gets finished successfully.

An exception error occurs when review activities are performed for items with exceeded size of Esent cache (CFT-899): A support feature named 'Esent Cache Management' is introduced to deal with items that exceed the defined size limit for Esent cache. When review activities like Tagging or Foldering are performed for such items, the following error is displayed:

"Tag operation failed: [#124013] Tagging Manager Error - [#124006] Tagger - Persistence Exception - While updating doc tagging data"

If you encounter this issue, please contact Veritas Technical Support for assistance.

System Administration

Page load time improved for user profiles with restricted access to cases (CFT-910): This fix provides improvements in page load times across eDiscovery Platform for user profiles with restricted access to cases.

Legal Hold

Escalation manager cannot be assigned to custodians using the Employee List > Details page (ESA-49982): This fix resolved an issue where the custodian picker was not displayed while associating an escalation manager to the custodians using the **Browse** button on the **Employee List > Details** page. With this fix, an escalation manager can be assigned to custodians as the Custodian picker is populated properly.

Legal Hold notices erroneously made accessible for users with restricted access (CFT-929): This fix resolved an issue where users with restricted access to Legal Hold notices could access those Legal Holds they were not authorized to view. With this fix, such users will only be able to view the Legal Hold notices they are authorized to view.

Legal Hold Custodian Release Notice do not include a link to the Legal Hold Confirmation Portal (CFT-851): This fix resolved an issue where Legal Hold Custodian Release notice was missing a link to the Legal Hold Confirmation Portal. With this fix, the link to the Legal Hold Confirmation Portal is included in the Custodian Release Notice.

Identification and Collection

For Exchange collection tasks, duplicate entries in the mailbox list are not filtered out (ESA-43370/ETrack-3668285):

When mailboxes from one Exchange server are moved to another Exchange server, new records of these mailboxes are created to reflect the new Exchange server. However, while creating Exchange collection tasks, users were shown duplicate entries of these mailboxes pointing to the old Exchange server. This makes the selection of current mailboxes difficult resulting in the failure of collection tasks.

With this fix, the duplicate entries of the mailboxes pointing to the old Exchange server are not displayed in the mailbox list that helps to avoid the selection of stale mailboxes. When Exchange servers are selected for collection, these stale mailboxes are filtered out during the submission of the collection job.

Enterprise Vault collection tasks targeting EV archives with index volumes spanned across multiple index servers shows incorrect status due to internal timeouts during the collection process (CFT-610):

This fix resolved an issue where EV collection task was showing incorrect status at the end of run in an environment where index volumes for an archive are spanned across multiple index servers.

Unable to search for a list of Enterprise Vault Mailbox Archives using "Filter: All Fields" (CFT-630):

This fix resolved an issue where users were unable to search for a list of Enterprise Vault Mailbox Archives by entering data using "Filter: All Fields" within the archive picker. With this fix, all matching mailbox archive names are displayed for the inserted text.

Collection tasks targeted for Enterprise Vault Journal Archives fail with "DUPLICATE SEGMENT entry" error (CFT-905):

This fix resolved an issue where collection tasks targeted for Enterprise Vault Journal Archives failed with the "DUPLICATE SEGMENT entry" error in certain situation. With this fix, such collection tasks are completed successfully.

Enterprise Vault collection task fails while recollecting errored items (CFT-903):

This fix resolved an issue where Enterprise Vault collection tasks for previously errored items failed with the "Retrieved file" error. With this fix, recollection of errored items works as desired.

Direct collection from certain Exchange servers fail due to an "inactivity timeout" error (CFT-864):

This fix resolved an issue where direct collection from certain Exchange servers failed due to "inactivity timeout" error. With this fix, direct collection from such Exchange servers completes successfully.

Hold on Enterprise Vault tasks not released when the collection name includes certain special characters (CFT-846):

This fix resolved an issue where hold on items was not released from Enterprise Vault database when the associated Enterprise Vault Hold task was deleted from eDiscovery Platform. This happened because the collection name included certain special characters. With this fix, the hold on items is released properly in Enterprise Vault when the associated Enterprise Vault Hold task is deleted in eDiscovery Platform.

Exchange 2010 collection task fails when the mailbox name includes a special character (CFT-840): This fix resolved an issue where collections from Exchange 2010 mailboxes failed when the names of the mailboxes contained certain special characters. With this fix, collection tasks complete successfully for such Exchange 2010 mailboxes.

Case Administration

Restoring a v6.6 case backup fails with “UpgradeException” (CFT-638): This fix resolved an issue where certain case backups from release 6.6 failed to get restored with an error: “com.teneo.esa.cluster.upgrade.UpgradeException”. With this fix, case restore operation completes successfully.

Processing job fails when the case is created from a Case Template having modified language settings (CFT-700): This fix resolved an issue where the processing job resulted in failure when the case was created from a Case Template having modified Language Settings. With this fix, the processing job in such cases is completed successfully.

Case report downloaded from the Processing > Reports tab becomes corrupt when the case name includes non-ASCII characters (CFT-765): This fix resolved an issue where the case report downloaded from the **Processing > Reports** tab became corrupted when the non-ASCII characters are present in the case name. With this fix, case report is generated successfully.

Jobs Pickup window is not auto-refreshed when a report is generated from the Processing > Exceptions page (CFT-770): This fix resolved an issue where the Jobs Pickup window was not getting auto-refreshed properly for a report generated from the **Processing > Exceptions** page. With this fix, the Jobs Pickup window is refreshed properly.

Processing

The “For selected items” list under “Set processing options” dialog on the Manage Sources screen do not appear (ESA-49872): This fix resolved an issue where the “For selected items” list under the “Set processing options” dialog on the Manage Sources screen was not displayed. With this fix, the “For selected items” list is displayed properly.

Native export from Processing > Exceptions page ignores user-selected locations (CFT-625): This fix resolved an issue where the native export from the **Processing > Exceptions** page ignored user-selected locations. With this fix, the user-selected locations are used.

Attachments in the attCacheDir directory remain unprocessed in certain situations in DA environment (CFT-709): This fix resolved an issue where if the default location of the attCacheDir directory was changed using the *esa.altAttachmentsDir* property to a local directory, then some of the attachments in that directory were not processed. With this fix, all attachments from the attCacheDir directory are processed as desired.

Database errors occurred during the Indexer and Message Threader stages (CFT-747):

This fix resolved an issue where database errors occurred during the Indexer and Message Threader stages when an EML with HTML-only content includes a derived email with extended Unicode characters in the subject text. Post processing, these items do not display the participant information on the Review screen. With this fix, the Indexer and Threader stages are completed without any database error.

EML files are wrongly categorized as "Loose Files" and then processed as plain text documents (CFT-807):

This fix resolved an issue where certain EML files were categorized as "Loose files" and then processed as plain text documents. With this fix, such files are now identified and processed as EML files.

Production/Export

"Print" option on the Analysis & Review page does not generate a PDF file for LFI source data (CFT-665):

This fix resolved an issue where the "Print" option on the Analysis and Review page failed to generate PDF files for specific documents ingested via LFI source. With this fix, PDF files are generated properly for such documents.

Export transform shows an incorrect status for folder membership when the folder name contains a Tab character (CFT-689):

This fix resolved an issue where for a folder with a tab character in its name, the Export transform functionality showed the documents that were members of a folder incorrectly as non-members of the folder in the generated DAT/CSV file. With this fix, a validation is done to disallow a tab character while creating a folder name.

Native export for processed collection sets fails when the directory path contains special characters (CFT-944):

This fix resolved an issue where native export for the processed collection set fails when the directory path contains certain special characters. With this fix, items from such collection sets are natively exported correctly.