Symantec eDiscovery Platform™

Release Notes

8.0

✓Symantec.

Symantec eDiscovery Platform™ : *Release Notes*

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Legal Notice

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Overview

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

Detailed information on how to use the appliance and the new features can be found in the documentation for that particular feature or enhancement. Each manual has a guide to the documentation in the Product Documentation section.

Upgrade Paths, Compatibility, and Notes

IMPORTANT! Symantec eDiscovery Platform supports the following upgrade paths:

- From the 7.1.2, 7.1.3, 7.1.4, and 7.1.5 to the 8.0 release.
- From 6.6, 7.0, and 7.1.1 releases, you must upgrade to 7.1.2 first and then upgrade to 8.0.

Additional Notes

- o Symantec strongly suggests reading *Symantec eDiscovery Platform Upgrade Guide* for 7.1.2 for instructions and tips on how to successfully upgrade to the 7.1.2 release.

- o Appliances running Symantec eDiscovery Platform version 6.6 can be upgraded to version 7.1.2, and your case content can be migrated into the 7.1.2 environment subject to some limitations. Contact your Solution Consultant to facilitate this upgrade.

- o During an upgrade to 7.1.2, 7.1.3, 7.1.4, or 7.1.5, the system will automatically launch a background task for optimizing existing case indexes. This optimization will ensure that the system performance is optimal when hundreds of reviewers are simultaneously searching and reviewing similar documents using the "Find Similar" option. For very large cases, this task may take up to 45 minutes per case.

- An 8.0 appliance is only compatible with 8.0 utility nodes. You must upgrade all utility nodes when running an 8.0 appliance. Symantec strongly recommends that you have separate machines for appliance and utility nodes.

- Microsoft's current PKI implementation is problematic and can produce "ASN1 out of memory" error for files larger than 5 MB. This error can cause large messages to be dropped during processing. Installing Microsoft's hotfix, KB2480994, helps process most of these dropped files. Refer to the Microsoft website for more details on the hotfix and issue: http://support.microsoft.com/kb/2480994.

List of supported operating systems and third party applications

- eDiscovery Platform Compatibility Matrix — http://www.symantec.com/docs/TECH211911

Case Backups and Upgrade Path

Symantec eDiscovery Platform supports upgrading cases from backups that were created up to two major releases previously. Cases that were backed up with versions 6.0 and 7.0 can be restored in version 8.0. Case backups created in versions prior to 6.0 must follow a two-step process: the case backups must first be restored to 6.0 and then to 8.0.

Operational Notes

This section covers important operational notes. For additional information, refer to the *System Administration Guide*, *User Guide*, and other specific documentation available by clicking the "**Documentation**" link at the bottom of any pane from the platform's User Interface, or the "Help" link on the upper right corner of any pane to access the Symantec eDiscovery Platform Online Help.

Browser Support

Symantec eDiscovery Platform is certified to work with the following versions of Microsoft® Internet Explorer® (IE): IE 8, IE 9 and IE 10.
Note: Installing and using Native Viewer requires the reviewer to be running the 32-bit version of Internet Explorer.

Symantec eDiscovery Platform does not currently support non-Microsoft browsers such as Chrome, Firefox, or Safari.

Additional Notes

- The application does not currently support running multiple sessions in a single tabbed browser window or single Internet Explorer process. If you want to have multiple sessions opened simultaneously on a single computer, you must either:
  - Launch a new IE session by choosing "File | New Session" from IE (press Alt to expose the IE menu bar if it is hidden in your toolbar)
  - Change your IE s shortcut to launch IE with the "nomerge" option or "iexplore -nomerge")

    If you launch a new session from an Internet Explorer shortcut icon, without adding the "nomerge" option, it **will not** work, since IE will automatically merge your sessions even though you think you're launching a completely separate one.

- The use of the 'copy' feature in the Search Preview feature requires that IE be configured to allow programmatic clipboard access. Internet Explorer comes configured by default to allow this, but if you get an error or it appears not to work, check the Scripting: Allow Programmatic clipboard access setting.

- Your browser flash cache may affect how the time zone is accessed and shown when viewing Case Reports. Clearing your flash cache will fix this discrepancy. To do this, follow the instructions here:

    http://www.macromedia.com/support/documentation/en/flashplayer/help/settings_manager07.html

Supported File Types

Symantec eDiscovery Platform supports over 500 different file types including all Microsoft Office 2007 and Microsoft Office 2010 formats. Refer to the *Supported File Types and File Type Mapping* section in the application's library (Online Help) for a detailed list of supported file types. (For additional user documentation sources, see Obtaining Product and Compatibility Information.

The following container file types are supported: ZIP (standard and self-extracting), GZIP, TAR, LZH (including LHA), UNIX compressed files, RAR (standard and self-extracting), BZ2, and 7Zip.

Supported E-Mail Types

Microsoft Exchange/Outlook: Symantec eDiscovery Platform supports all PST and OST file versions. Supported Exchange server versions include 2007, 2010, and 2013 and the supported Outlook versions is 2010. EDB files are not currently supported. As of 7.0, the application requires Microsoft Outlook client 2010.

Lotus Notes: Symantec eDiscovery Platform supports Lotus Notes 8.5.2. Older versions of Notes often can be processed with no issues; however, there are some known issues with the Notes APIs that may cause problems. While these issues are outside of our direct control, we made some adaptations to the crawler to make it operate as smoothly as possible. Starting with 7.0, the application requires Lotus Notes client 8.5. If you restore an older case to a version 7.0 or later installation where that case has processed NSF files using Lotus Notes 7, the messages may de-duplicate differently. Please refer to the S*ymantec eDiscovery Platform Upgrade Overview* document for more information.

Email Loose Files: When processing loose files, the application automatically processes .eml, .emlx, and .msg files as emails as long as they are compliant with the RFC822 specification (in the case of .eml files) or the Microsoft .msg specification (in the case of .msg files). If you restore an older case to a version 7.0 installation where that case has processed loose files, those loose files may de-duplicate differently in the current environment.
Known Issues in these Release Notes contain current open issues related to the processing of .msg, .eml, and .emlx files found in containers.

MBOX Files: Processing MBOX email containers (and derivative formats such as MBX) is also supported. These are converted into PST files and stored in the application's managed email conversion area prior to processing.

Distributed Review and Processing

Please refer to the *Symantec eDiscovery Platform Distributed Architecture Deployment Guide* for configuration, operational and installation information.

Supported Collection Sources

The following are supported sources for identification and collection using the Symantec eDiscovery Platform:

Microsoft Exchange 2007, 2010, 2013, Office 365, Lync 2013 with Exchange 2013

SharePoint 2007, 2010, 2013, SharePoint Online

Lotus Domino Server 8.x, 9.0

Symantec Enterprise Vault 10.3, 10.0.4, 11.0*:* The Enterprise Vault 10.0.4 and 11.0 sources from Exchange 2013, SharePoint 2013, and File System Archiving from Windows 2012 targets are certified. Also, the Enterprise Vault 10.0.3 sources from Exchange 2013 are certified. However, the Enterprise Vault 10.0.3 sources from SharePoint 2013 and File System Archiving from Windows 2012 targets are not certified.

Symantec Enterprise Vault.cloud

Windows File Shares: Symantec eDiscovery Platform can collect from file shares over the network.

PC/Desktops: The OnSite Collector can collect data from laptops, PCs, and Macs directly using USB drives.

Note: If you have other content repositories in your environment (such as OpenText LiveLink, Documentum, FileNet), contact your Symantec Solution Consultant for additional information.

Product License

License display of trial versus permanent license expiration dates: The license expiration date shows the latest applicable expiration of all currently applied licenses. Prior to 7.1, the application applied only a single license and a single license expiration date. Starting with 7.1, multiple, stackable licenses may be applied at the same time. If some of those are trial licenses with an expiration date, and others are permanent licenses with no expiration date, the license page does not display the trial license expirations. The trial license functionality is not affected by this change and will expire according to the trial period specified in the trial license.

Enterprise Audio Processing usage model is based on the number of hours of audio content that has been processed: Release 7.1.4 of the Symantec eDiscovery platform introduces audio search functionality to its processing, analysis and review (PAR) capabilities. The system maintains an up-to-date inventory of the number of hours of audio content that has been consumed and the number of hours available. To review license information and see how much capacity you have used, see "Managing Your License" in the System Administration Guide.

Administration

Backups/Archives tab shows a yellow warning banner saying "Migration Incomplete" even after migration has completed (37697): Case backup migration automatically moves backups from the "casebackups" directory (the pre-7.1.2 location), to the "casebackups\cases" directory (the location for 7.1.2 or greater). This works for the pre-7.1.2 backups, but not for backups in later versions. Case backups created in 7.1.2 or greater will not be in the "casebackups" directory (unless they are moved manually). If a case backup created in version 7.1.2 or greater is placed in the "casebackups" directory and the appliance is restarted (cluster master or single node), the case migration will NOT proceed for that backup and a warning message will be displayed in the **All Processing >Backups and Archives** tabs.

To remove the warning banner, move the case backup from the **casebackups** directory to the **casebackups\cases** directory.

Setting access permissions: The application is designed to run with a single administrator credential which allows access to all network resources that the appliance needs to access (processing, backup/restore, etc.). This credential must be consistently configured for all of the application's Windows services and for the Windows account (**Windows authentication for Clearwell appliance** located on the **System** > **Settings** > **General** tab) that you configure in the platform's User Interface.

Note: Refer to the Administrator QuickStart Guide (*First Things First!*), for critical setup information for user accounts, credentials and access permissions.

Appliance restart following a change in network configuration: The application does not support dynamic network reconfiguration. Administrators should stop all services and restart the appliance after any change in the appliance's IP address.

Disabling appliances for maintenance: If an appliance is part of a cluster, it is recommended that the administrator disable it from the Manage Appliances page prior to taking it offline.

Authentication for off-appliance backups: If you are backing up cases off-appliance, the *EsaApplicationService* logon credentials are used to authenticate against the remote file server, not the credentials specified in the System Settings area.

Deleting a source: On the **Manage Sources** page under **Case Management**, once you have processed any data in a source, you cannot delete it.

Space and time required for backups will be increased for cases with redacted and produced documents: The platform uses a "permanent cache" for redacted and produced documents which means that the rendered document is permanently stored in the case's database. These rendered documents will be included in case backups and may increase the space and time required for case backups. For environments where cases will involve substantial document review and production, it is recommended that case backups and the temporary and permanent caches be located off appliance. Contact Support for more information on storing and managing backups off-appliance.

Backing up the Legal Hold confirmation and administration servers: As a best practice, when backup and/or restoring the Legal Hold confirmation and administration servers, both servers should be taken down before a backup or restore is performed, and then backed up. The administration server should be backed up first, before the Legal Hold confirmation server. Always restore in reverse order (Legal Hold confirmation server, then the administration server). If this does not happen, it is possible that the hold notice recipients will see inconsistent information when responding to hold notices on a restored confirmation server

Installation and Upgrade

Complete processing before upgrade (38724/38944): In versions prior to 8.0, it was possible to upgrade to the next version of Symantec eDiscovery Platform even if processing and post processing had not completed for a case. With version 8.0, a case that has had its processing stopped will fail to upgrade and the case will not be accessible. After the upgrade to 8.0, users can either re-index the case, losing all work product, or to restore the case backup on the previous version of eDiscovery platform and finish processing and post processing.

Important: **To avoid these outcomes, complete processing and post processing for all cases before performing an upgrade to version 8.0.**

Case restore from version 7.1.2 takes longer in version 8.0 than in 7.1.5 (37604): Changes that are part of 8.0 require a database table upgrade when the cases are restored. Depending on the hardware configuration and case sizes, it can take several hours for case restore to complete.

After upgrade the entire Controlled Prediction Accuracy Test is cleared without any indication message (32358): If you have run a Controlled Prediction Accuracy Test for a case using a previous release, then after upgrading to 7.1.4, you must recreate the initial and additional test sample data for the upgraded cases. For more information on the Controlled Prediction Accuracy Test, refer to the Transparent Predictive Coding User Guide.

Enterprise Vault (EV) Discovery must be rerun upon upgrade (26660): Because additional metadata is discovered in the new EV Discovery workflow, upgrading requires that you rerun EV Discovery before starting any EV-related tasks. This additional metadata can be used as filtering criteria in tasks.

Note: Tasks created in a previous version that are in a stopped or failed state cannot be run in the upgraded version. Complete these tasks before upgrading. If necessary, you can copy these tasks and restart them in the upgraded version. In 7.1.4, several enhancements are introduced to retry tasks in a "Partial Success" or "Partial Failure" status. The tasks created in 7.1.3 that are in a "Partial Success" or "Partial Failure" status should be copied and rerun in in the upgraded version.

Check the disk space in your database before you start case processing (26106): If the database runs out of disk space during case processing, increase the disk space and either restart case processing or restore the case from a backup and resume processing.

Identification and Collection

Links are not collected in SharePoint collections (32565): In SharePoint collection tasks, links that are created as part of Lists are not collected.

Contacts are not collected in SharePoint collections (32242): In SharePoint collection tasks, contacts are not collected from SharePoint.

Items from Asset Library and Data Connection Library are not collected in SharePoint (32234): For SharePoint sources, the content type of the 'Assert Library' and 'Data Connection Library' is not listed as default content types, and therefore items from Asset Library and Data Connection Library are not collected. The collection task results in a "Partial Success" status. The uncollected CSV file shows an error entry: An error occurred during collection - Other (Error Code: 1) -Unexpected content-type, expected "Document."

You can overcome this issue by adding the desired content types using the property *esa.icp.sharepoint.contentType.document*.

Content from sub-sites is not collected in SharePoint (32197): In SharePoint collection tasks, if the source URL is configured as a top level site and the source account is a user in the Viewer's group in SharePoint, then the contents from the sub site are not collected. The source account user must be a member of the Site Owners group.

Domino mailbox discovery not populating email addresses correctly (28539): For the custodian addresses to be obtained from the Domino server and for this collection to complete with the correct number of hits, the user must run Domino discovery first and then EV discovery second.

Individual files larger than 4GB cannot be copied to or from FAT32 file systems and will block the move process (26074): Ensure that no files larger than 4GB exist in the collection if the target Collection Destination is a FAT32 file system.

Moving a Collection to a destination without enough free disk space may cause the move job to run forever without failing (26575): Before a collection is moved, the amount of free space at the destination is verified. If you move a collection to a destination and at the same time attempt to copy other data to the same destination, the amount of free space is not recalculated. If the destination runs out of space during the move, the system will continue to try copying the files indefinitely.

Failure to perform federated keyword searches on Microsoft Cloud (BPOS-D) SharePoint sites that have been migrated to Office 365 (25636): This is a known issue with SharePoint online. Do not enable federated search for Microsoft Cloud (BPOS-D) SharePoint sites that have been migrated to Office 365. Non-federated searches will continue to work.

Upgrading with stopped collection tasks: Collection tasks that are stopped before an upgrade and resumed afterwards will fail. Please allow all running collection tasks to complete before initiating an upgrade, or create new collection tasks after upgrade to successfully collect data.

Enterprise Vault (EV) Collections and search keyword count: For Enterprise Vault collections, when search keyword is specified, the eDiscovery Platform does not collect any messages where the message body or attachments that EV was unable to index during archiving. For example, a message in EV with at least one or more attachment that was not indexed such as a RAR file would not be collected if a search keyword filter is specified.

Profile Settings for Microsoft Exchange email and Active Directory Group Policy Object (GPO): If you plan on performing Microsoft Exchange collections, verify that the Exchange source email account profile that is being used to collect data does not have the following option enabled: "Use Cached Exchange Mode". It is also important to confirm that the Active Directory GPO settings do not enable this option either.

File path lengths can affect the size and number of files reported in collections: For collections that maintain a folder path hierarchy that exceeds 255 characters, Windows Explorer is unable to calculate the size and number of files correctly. This limitation and behavior may lead you to think that there is a discrepancy between the total number of files that the user interface reports in the destination folder versus the number of files in the collection. This is not true. In fact, the actual number of files in the destination folder does match the number of files in the collection folder. You can verify the number of files in these folders, as well as the size of folders and subfolders, using a tool like TreeSize.

Collected TIF/TXT pairs are not treated the same way as TIF/TXT pairs from a case folder during processing: Both the TIF document and the TXT document of a TIF/TXT pair from a collection set are indexed and returned in search results.

SharePoint files with long file paths cannot be collected: File paths on SharePoint which are longer than 260 characters cannot be collected automatically. You will need to collect these manually by using the SharePoint "Send to:" menu and downloading a copy.

Some files and folders in SharePoint are not recognized, so cannot be copied: SharePoint has two views, the All Documents (Normal) View and the Explorer View. Certain files or folders are not visible in the Normal View even though they are still accessible from the Explorer View. Due to this Microsoft limitation you will need to collect these manually by using the SharePoint "Send to:" menu and downloading a copy outside of the eDiscovery platform.

Files and folders named with special characters or beyond a certain length can't be collected on a Macintosh. The Symantec eDiscovery Platform can't collect files and folders containing forward or backward slashes in their names. The application can't collect from files and folders with paths longer than 1024 characters or when the destination path becomes longer than 1024.

Network share renamed after outage for Mac collections. Users should be careful as Macintosh remounts the network shares to a different folder than the original, if the connection is interrupted. This new mount folder is usually named 'OldMountFolder-1'.

Network shares mounted on a Mac are collected when "All" volumes are specified for collection. You should unmount any network drives that you do not want collected before starting a collection on a Mac.

A user with limited privileges within the MacOS cannot run the OnSite collector. You should make sure before running the Mac Collector application that the application is not restricted by Parental Controls, and that you have full read and write permissions on the folder where the OnSite collector is run from.

Custodians in the PAR (production, analysis and review) modules are case-insensitive, and might be merged with custodians from the Collection module inadvertently. If an existing custodian in the PAR (Production, Analysis and Review), modules matches a custodian from the Collection module but has a different case (for example, "James van Pelt" and "James Van Pelt") these two custodians will be merged.

A bulk import job will fail if a file name contains CJK characters: When performing a bulk import of Identification and Collection sources, if the filename has Chinese, Japanese, or Korean characters in it the import job will fail.

Bulk import jobs may not restart automatically if the appliance was shut down. During an appliance restart the bulk import jobs are not being resubmitted automatically. If a bulk import job was in progress when an appliance is shut down, you will need to restart the bulk import job manually.

Load File Import

Loose files imported by LFI are not grouped in the "File "Screen for Analysis and Review (37894): Loose files that have been imported via LFI are assigned a content checksum that is the same as the strict checksum. For data imported via LFI, the strict checksum is generated solely from the unique import Bates number. Therefore, because the content checksum is always unique for these documents, the application is unable to group them in the "File" screen of Analysis & Review.

LFI source discovery with tags is failing with " IndexOutOfBoundsException" (26672): If there is more than one tag and any multi-value separator is used other than a semicolon, the source discovery will fail. Starting in release 7.1.2 Fix 2, third party import now handles Symantec eDiscovery Platform export of user-defined multi-value delimiter for tags. If the load files are generated from a prior version, they can be imported by setting `'esa.imports.cwtagmultivalueseparator'` to true.

Legal Hold

Scheduled Legal Hold emails cannot be changed from the "Schedules" page: Even though you can make changes in the **System** > **Schedules** screen, they are not propagated to the Legal Hold "Edit Notice" area.

Pre-Processing

Zero-byte files will always be excluded when using a known file filter: The NSRL NIST list includes the hash for zero byte files. This means that zero byte files will automatically be excluded from processed when enabling a known file filter on a case folder.

The NIST list version has been updated to 2.43 – (Jan 2014).

Network performance may slow discovery speed. When performing discovery on a NAS source, network speed and disk latency on the NAS will affect discovery performance.

Processing

Post Processing Reliability improvement in 8.0: The UI now displays errors that were generated during post processing. The System Manager, eDiscovery Admin, and Case Admin can see **Internal Errors**, a new option under Processing.

| Processing Status | Settings | Sources & Pre-Processing | Reports | Exceptions | Internal Errors | Batches | Custodians | Groups | Participants |

Internal Error

Error Type	Component	Phase	Timestamp	labelId	itemId	emailDbId	emailFtId	attDbId	attFtId
errorType0	component0	phase0	timestamp0	labelId0	itemId0	emailDbId0	emailFtId0	attDbId0	attFtId0
errorType1	component1	phase1	timestamp1	labelId1	itemId1	emailDbId1	emailFtId1	attDbId1	attFtId1
errorType2	component2	phase2	timestamp2	labelId2	itemId2	emailDbId2	emailFtId2	attDbId2	attFtId2
errorType3	component3	phase3	timestamp3	labelId3	itemId3	emailDbId3	emailFtId3	attDbId3	attFtId3
errorType4	component4	phase4	timestamp4	labelId4	itemId4	emailDbId4	emailFtId4	attDbId4	attFtId4
errorType5	component5	phase5	timestamp5	labelId5	itemId5	emailDbId5	emailFtId5	attDbId5	attFtId5
errorType6	component6	phase6	timestamp6	labelId6	itemId6	emailDbId6	emailFtId6	attDbId6	attFtId6
errorType7	component7	phase7	timestamp7	labelId7	itemId7	emailDbId7	emailFtId7	attDbId7	attFtId7
errorType8	component8	phase8	timestamp8	labelId8	itemId8	emailDbId8	emailFtId8	attDbId8	attFtId8
errorType9	component9	phase9	timestamp9	labelId9	itemId9	emailDbId9	emailFtId9	attDbId9	attFtId9
errorType10	component...	phase10	timestamp10	labelId10	itemId10	emailDbId10	emailFtId10	attDbId10	attFtId10
errorType11	component...	phase11	timestamp11	labelId11	itemId11	emailDbId11	emailFtId11	attDbId11	attFtId11
errorType12	component...	phase12	timestamp12	labelId12	itemId12	emailDbId12	emailFtId12	attDbId12	attFtId12

Export

The errors shown in the option used to cause post processing to fail for the entire data set. Now the errors are recorded and can be exported in a CSV file for troubleshooting with Support.

Some file types that fell in the "Other" category previous to 7.1.3 show up in a different file type category post upgrade, affecting information on the Pre-processing charts and Analysis & Review page. (31458): This is a known issue post-upgrade for files that fell into "All Images" and "Other word document types.

- Already indexed files belonging to the "All images" file category such as Encapsulated Postscript, and the "Other word document types" file category such as OpenDocument Text, will be shown as the "Other" file category in Pre-processing charts and Analysis & Review page. The processing report will however report these types of files as "All images" and "Other word document types" respectively.
- Discovered sources with files in "Other" file category should be re-discovered so that the files that belong to "All Images" and "Other word document types" are categorized as such and appear as "All Images" and "Other word document types" in the Pre-processing charts and on the Analysis & Review page.

Presentation files (ODP, etc.) that had been categorized as "Other" prior to upgrade are still displayed as "Other" after upgrade, but the same file indexed in a new case in 7.1.3 will be categorized as "Other Presentations" in both pre-processing charts and Processing Report.

Nuance OmniPage OCR failures due to document size (31720): Vendor restrictions on document size cause these failures. Minimum width or height for an image file is 16 by 16 pixels; the maximum is 8400 pixels (71cm or 28 inches at the resolution 201 to 600 dpi).

Customers who purchase Symantec eDiscovery Platform after April 15, 2013 need to address OST/MBOX to PST conversion issue (30807/30919):

Before using the eDiscovery platform, the user must consider the following options:

- For users on version 7.1.3, OST files are flagged during discovery as excluded to give them the opportunity to use alternate means to convert them to PST files for processing. For 7.1.2 users, OST files will error at discovery time for the same purpose.

> **Note:** If the user disables **Convert mail formats (OST, MBOX) to PST** in case settings, then all OST and MBOX files will be treated as loose files.

- Alternatively, the customer may purchase a license for "Advanced Exchange Recovery" directly from the manufacturer, DataNumen at http://www.datanumen.com/aexr. **If the customer purchases this license, then they do not need to apply Hotfix ESA-30819**.

Distribution list of names are not recorded when they appear in the Bcc field of a P1 message (29179): This is a known limitation of Journal Envelope handling. The Distribution list names, part of the Bcc field in a Journaled message, might not get processed by the eDiscovery application and thus might not be searchable.

In text view, Nsf Calendar item shows incorrect time zone in body (28852): This is a known hash mismatch issue during export of NSF data. If an export of NSF data does not complete, check to see if there are hash mismatch errors. If so, these can be resolved by setting `esa.retriever.validate_hash = false` in the Property Browser.

Issues with imaging MSG files (28720): In some cases, email messages cannot be imaged using near-native imaging (for example, if they contain links to content on an inaccessible server). These messages are imaged using a "best-effort" rendering that preserves all of the content but did not preserve the near-native view. These items will be tagged with the imaging status tag "Clearwell Basic Render Imaged". **Note:** This behavior is enabled by default, but can be disabled through the following property:
`esa.igc.msg.conversion.retry.enabled=false`

Content from NSF files contained within load files could be indexed without metadata (22357): NSF files are not supported in a load file source. During processing, all NSF-type messages from native files should be dropped. However, when the Processing option "Extract metadata from native file or Symantec eDiscovery Platform standard fields, plus add custom fields from load file" is selected, the message is indexed without any metadata. In this rare use case, these messages are marked with the Sender Missing message flag.

De-dupe issues with Aid4Mail version 2.0 and 2.3: When MBOX emails are converted to PST using Aid4Mail version 2.0 or 2.3, an empty file is created in place of attachments. If the attachment link points to either an invalid file or unresolved URLs, it is possible that duplicate emails may have different sizes and may not de-dupe in the eDiscovery platform. This de-dupe discrepancy can occur for MBOX sources that were indexed in cases prior to 7.1.

When including calendar and contact entries in processing, keyword search hits will query all metadata fields and content as if it were "full text" (8094): This is generally desirable as it maximizes the number of documents retrieved for a given search term. However, some consideration should be given to the fact that a search for a keyword like "December" might return a calendar metadata field with a formatted date containing that keyword. Also, metadata field names are also indexed and searchable for these types of content, so you may get additional search hits based on hits on those field names that are false positives.

Processing volume reported on pre-processing and processing page may vary slightly because in some cases the content extracted from Outlook 2010 is different from that extracted from Outlook 2003 (22161): In previous releases, Symantec eDiscovery Platform used Outlook 2003 for extracting content of emails from PST and MSG. In 7.X, the application uses Outlook 2010. In some instances, the content extracted from the two versions is different for the same e-mail. In such cases, the processing volume reported for the same documents set may be slightly different between V7.X and earlier versions of the eDiscovery platform.

Processing may fail due to inactivity time out due to slowness introduced in Outlook 2010 MAPI (21846): For reasons that are unknown, retrieving e-mails from Outlook 2010 is slow in some situations, resulting in timeouts and restarts of the processing job. If you encounter this issue, please contact Technical Support to increase the default inactivity timeout.

PST files seen in Not Processed reports (14010): Not Processed Reports will show PST files that have not been processed for cases created in Cascades onwards. For upgraded cases the report will show not processed loose files as in previous CW versions.

Due to improved handling of EML/EMLX content, some EML/EMLX documents may not de-duplicate with previously processed EML/EMLX documents: Due to improved handling of EML/EMLX content in 7.X, for upgraded cases the same data if ingested before 7.X may not de-duplicate.

Solution for OST/MBOX conversion failures: If an OST/MBOX conversion fails during discovery, logon to the OST/MBOX conversion Windows account (with appropriate credentials), launch Outlook 2010 and select it as the default email client. If you have OST/MBOX files with errors, and you have implemented the default email client directions above, go to the Property Browser, set the case property, `esa.case.processing.reconvertErrorEmailFiles = true`, and discover new files for the source.

Specifying a date range during email processing: If you specify a date range during email processing, emails that have no sent date are automatically included along with those emails that fall within the specified date range. (At present there is no way to exclude emails with no sent date from processing.) As of 7.X, any emails with a sent date before 01/01/1970 are also processed in addition to items without a sent date.

Do not open PST or NSF files during processing: PST or NSF files should not be opened while being processed. This will cause processing of that file to fail, and the source file to become corrupt. If you need to open a PST or NSF file to verify it, copy the file to a temporary location on another system and open the copy from that location.

Do not use the same source file across multiple active cases: Only one case can safely access the source file at one time. If you need to share the same source files across multiple cases (even across multiple appliances), make multiple copies and place them into case-specific subdirectories prior to processing.

Do not modify files after processing: Symantec eDiscovery Platform assumes that the content of documents that have already been indexed does not change over the course of their use in the application. So, if a file changes after indexing you may experience unpredictable behavior in the eDiscovery platform that may affect the integrity of search, viewing, redaction, production, and export.

Preserve original copies of PST and NSF files before processing: Administrators are encouraged to only process copies of PST or NSF files. Symantec eDiscovery Platform uses documented Microsoft MAPI API and Notes API calls that do not alter any of the content within a PST or NSF file, but does modify the last accessed date of the container. Also, in the case of PST files, the overall size of the PST file may change slightly due to the MAPI API, though no email content is altered. Note that PST files should be copied to a location that has read/write permissions. The eDiscovery platform cannot process PST files from non-read/write media such as CD-ROMs.

Document source indexing progress: In certain cases, the "Document Indexer" status on the case status page will show as completed even though one or more of the Indexing Progress bar(s) are not yet 100%. In other cases, particularly when processing large volumes of loose files, the progress bar for the source may show 100% even though processing is not complete. The various status indicators will "sync up" after a few minutes. After a total of 1 million unique documents are indexed into a case, the source level progress is not shown for each source name on the Processing Status page. Check processing job logs for updates. Additionally, note that Manage Source glyphs will not show updates.)

Crawling of disabled Active Directory accounts: The Symantec eDiscovery Platform Active Directory crawl will only automatically populate active user mailboxes on the Exchange Document Crawler page. If you need to process a disabled exchange mailbox, then enable it and rerun Active Directory crawler to pick it up.

Processing of large documents: When processing documents, the application indexes them based on "tokens" (generally, words) that they are composed of. By default, it does not index documents that exceed 500,000 tokens (note that emails and their attachments are considered separately and have their own independent 500,000 token limits). This limit can be raised by setting a configuration property to a higher value.

Note: All documents that are not indexed because they exceed the token limit are logged as partially indexed in Case-Exceptions - File notices or crawler truncated in Case Exceptions - Message Warnings. Contact Symantec Support if you need to increase this limit.

Handling of time differences between seemingly identical messages: On rare occasions, the application may find two copies of an identical message with sent times that appear to differ. This is because of the way that Microsoft Exchange stores and tracks message submit times when clients are off-line and/or there is a time difference between a local machine and the Exchange server. In such cases, the Exchange server time is the canonical time of the message.

Post-processing time may vary significantly based on the type of documents being processed: Document sets containing a large number of distinct terms (for example, source code with a large number of different variable names and other non-standard-dictionary terms) post-processing may take longer to process than document sets without these types of documents. Additionally, multi-language cases where language-specific stemming has been enabled will also take longer to post-process.

PST and NSF service permissions are used when scanning email files: When accessing PST and NSF email files for scanning during discovery, Symantec eDiscovery Platform uses the Windows account credentials supplied on the application's system settings page, and not the service accounts specified for the ESAPST and ESANSF services in Windows for authentication. If no credentials are specified in the system settings page, the eDiscovery platform uses the ESAApplicationService account credentials.

Effects of changing disclaimer text on de-duplication: Symantec eDiscovery Platform de-duplicates (eliminates duplicate items) based on the actual content that it processes into its search index. So, if you do an initial processing batch without a disclaimer text exclusion, and

then add a disclaimer text exclusion for a subsequent batch, the same email processed in the application is indexing different content for the second email now that disclaimer text is being excluded from indexing.

Changing the location of the PST/NSF extraction directory: PST and NSF files extracted from Encase evidence files and ZIP containers are stored in a special extraction directory that can be specified at the system and case level. If you change this directory, after indexing content, you need to rerun any active searches in order to access any content from extracted PST/NSF files.

Converted OST files may contain more messages than appear when viewing in Outlook: This is due to the fact that the Symantec eDiscovery's OST conversion will pick up content (such as deleted items) that is present in the OST but may not be visible when viewing that OST in Outlook.

Embedded content that cannot be recognized as a user-readable document will not be extracted: To streamline document review and clutter, when embedded object extraction is enabled, Symantec eDiscovery Platform will validate extracted objects to make sure they are able to be read and presented to the user. If they cannot be, then they will not be separately extracted. Note that the embedded content will still be part of the parent document when natively produced. The parent document is flagged with the file flag: "File contains unknown embedded content". In search, when reviewing the parent document, the following description is displayed: "Unknown embedded documents ignored"

Naming Convention for embeddings and nested embeddings: When embedded objects are extracted from documents, Symantec eDiscovery Platform assigns these objects names in the format "CWEmbedN.<file extension>", where N is a number, so an embedded Excel spreadsheet might be named "CWEmbed2.xls". The embedded files are numbered in the order in which they were encountered in the file, though occasionally some numbers may be skipped if there was some issue extracting an embedded file. When reprocessing, if the issue is resolved the file extracted, the missing number will be used to place the object in its proper order.

Volume processed for multiple runs of the same data may not match: To improve processing performance, if Symantec eDiscovery Platform encounters a duplicate document during processing, it uses the size of the first document when computing processing size. For email formats (such as PST) where the size of identical messages may vary due to slack space, this may cause very minor differences in processed volume across multiple runs.

Some images may not be extracted from NSF files: If a message in an NSF file contains a malformed image, that is, an image file that does not follow the standard image segments that can be handled without crashing the system, the image will not be extracted.

Note: The image may appear to be normal when viewing the message inside Lotus Notes.

Some email and messages with OLE and MSG attachments may not de-duplicate with previously processed documents: Email and calendar messages with attachments of type OLE or MSG that were processed in Symantec eDiscovery Platform versions prior to 6.6 may not de-duplicate properly with email or calendar messages with the same attachments that are processed in version 6.6 or later.

New processing, Re-OCR, or post-processing jobs will fail if a prior post-processing or processing, Re-OCR job failed: Any new processing, Re-OCR or post processing job will fail if there is a prior post processing job that is in failed or stopped state. You must re-run post processing prior to submitting a new job.

Support for NSF messages with subject or body that are of type list: Symantec eDiscovery Platform now supports processing, search and review of NSF messages whose participants (sender, recipients), subject or body uses a "text-list" data type in NSF. Prior to this release, these documents would be dropped with the error: "Unknown or Unsupported Error in Sender or Recipient"

Support for messages in PST sources and loose file messages that have the PR_BODY_HTML property: Prior to 7.X, Symantec eDiscovery Platform would show empty body content for loose file messages or messages from PST sources if the PR_RTF_COMPRESSED MAPI property was empty for the message, indicating that an RTFSynch operation had not been executed on the message. Release 7.X now indexes content in PR_BODY_HTML for these messages.

Compatibility between security software and Windows Management Instrumentation (WMI): Symantec eDiscovery platform depends on Windows Management Instrumentation (WMI) in order to gather hardware utilization statistics for adjusting processing speeds. In the event that the application is unable to obtain WMI statistics, the system will not be able to discover or process data successfully. Ensure that your security software configuration is not blocking or interfering with WMI and its ability to collect the eDiscovery platform's management data.

Data Analytics

Collected and ICP Case Sources statistics are not present for restored cases that contain ICP sources. (15047): Integrated Analytics charts for collected items is not shown if a case is restored on a different appliance. IA charts for cases sources is shown even for data from ICP collection sets.

Charts will not show data for some case sources: For cases created prior to 5.5, the chart shown when drilling down to see the file types contained in the volume will show all file types as "Other types". For cases upgraded to 6.0 or later, the value shown for Collected and Case Sources volumes will be 0. When a case has the pre-processing license turned off, case source charts will not show data for PST sources.

Processed volume may not agree with the volume reported in Collections, Manage Sources, and Pre-Processing reports. If an attachment is in a compressed file on an Exchange server, the size of the attachment within the container file will not be accounted for in some cases.

Analysis and Review

Pre-8.0 Saved Searches Using Dominant Language Filter Option

The Predominant Language Filter option that allowed users to specify the percentage (50-100%) of a document that must be in a language in order to consider it predominant has been deprecated. In pre-8.0 versions the option was available from the Advanced Search menu in the Analysis & Search module. Users can continue to use the Language filter Boolean options in Advanced Search.

Important! Saved searches with the predominant language constraints will *not* run. The following error message will display:

"This saved search cannot be run because it uses a deprecated search function for Dominant Language.

Edit the Languages criteria in <u>Advanced Search</u> to remediate this issue."

To resolve this issue, edit the saved search with the predominant language constraint and this will silently remove predominant language constraints.

Users unable to batch items from Discussion Thread view (38240): Selecting documents to batch from the discussion view does not create folders with items batched in them. Use the Documents view to create folders of batched items.

"Resume" does not work after bringing in families for selected messages (36001): As a consequence of how Item Level View works, there has been a change in the behavior of the resume feature. Now when the user logs in again to resume the saved search state, the family items will appear together only as long as the link at the top of the screen is used to bring in all the family items for the search. Results obtained by selecting the "bring in family" button for individual items will not be preserved by the resume feature.

Tag based action searches for a given user combined with keyword constraints don't return identical results in v711 vs v713 for the same case (31387): Searches with "tag action" constraints AND item-level constraints (e.g. keywords, file types, predictions, tags) performed before item-based tagging was introduced in v7.1.2 may return different results post-upgrade. In v7.1.3, this is due to the fact that the tag applies to an individual item. Even though family tags are propagated to child items, this propagation does not use the same user account as the original tag application, when performed during upgrade. Tags that were applied and removed are not propagated at all.

Total item counts in activity reports for upgraded cases show "-1" for many events (31308): In activity reports, a value of -1 is used to represent a count value that is not available.

Proximity search hit highlighting is not limited to the proximity number specified by the search (7125): When proximity searches are executed, all instances of the terms contained in the proximity search query are highlighted, as opposed to just the ones limited by the proximity number specified by the search.

MS Email API's do not provide consistent ordering of email addresses in the To, From, CC and BCC fields (7307): The MAPI interface that Microsoft provides for accessing emails in PST's, Exchange, etc., does not provide email addresses in the To, From, CC and BCC fields in a consistent order. As a result, the order in which email addresses are indexed may differ from how they might be displayed. Thus, a proximity search could find an email that does not appear to match the proximity within these fields but actually did when the email was indexed.

Some documents may appear to be false positives because text in certain files may not appear in the HTML view (7834): Sometimes not all of the text in a document can be rendered in the GUI. If the document is included in the search results because the search query matched the non-rendered text, it may appear that the document should not be in the search results.

Locator search performance and optimization strategy (7838): For optimal locator search performance and results, restrict your locator search criteria to the smallest possible set of matching documents instead of doing broad locator searches.

Searching for an email address will sometimes find documents with no highlighted string that initially do not appear to contain the email address (8021): Emails displayed in the UI will show display names and/or email addresses in the To, From, CC and BCC fields. In certain cases, however, some email addresses and additional information contained within these fields will not be displayed. As a result, a search for these kinds of terms will find a document, but the search term(s) will not be highlighted and will not appear to be contained within the document. In this case, the terms can be viewed by hovering over all of the display names or email addresses that are shown in the email. The hover that appears will contain the terms used in the search query.

The "unknown" sender and "No recipient" recipient filter values are unexpectedly large (8109): Loose files are currently defined as having "no recipients" and an "unknown" sender. Thus every loose file within the search results is counted within the "unknown" sender and "no recipient" recipient filter values.

A search containing a number with wildcards may incorrectly hit highlight some terms in returned documents (8277): A search, such as "patent AND 1??" may incorrectly hit highlight terms containing 1??, such as 6,122,417.

Some double-barreled, complex names in contained emails may result in the creation of two participants (8367): Certain double-barreled (i.e. family names that have two parts and may or may not be hyphenated) names in contained (derived) emails like "van basten, chris p." can result in the creation of two participants such as "van basten" and "chris p." Both are still searchable but may appear separately in participant analytics. Original emails are not affected.

Total email count on Participants page double count emails where participant was both a sender and a recipient (8473): The Total column on the Participants page sums the emails received and sent by a particular participant. As a result, if the participant has sent an email where they also were a recipient this email would be double counted in the Total email count.

Attempting to use quick filter multiple times before the first quick filter request completes can hang the application (8516): Rapidly clicking on multiple numbers associated with filter values (quick filters) will hang the application. You can avoid this issue by letting the preview filter complete before trying to quick filter on another value.

Certain search terms are not hit-highlighted (9722, 10182): Some search terms that match content in the To, From, CC, and BCC fields are not hit-highlighted.

Some documents that indicate embedded content will not display any embeddings (13358): This is due to embedded content which was actually an image that was not extracted from the parent document.

The optional email notification sent when tagging occurs contains the internal IP address of the appliance and may be missing detailed tagging information (6319).

Getting the most from large volume simultaneous searches: While Symantec eDiscovery Platform is designed to support large number of simultaneous searches, it is important to note that if the searches contain over 1000 terms. If more than five concurrent users issue such

searches at the same time on a single appliance, the search response time may be slow. In these particular scenarios, it is highly recommended that "Generate keyword details for filters and report" option on the advanced search is turned off.

Saved Searches created using file type filters may have different results count after the upgrade: In 7.X, a few of the image types that were reported under "other types" category are now reported under "all images" category in the file type filter. As a result, saved searches created using "other types" and "all image" categories in the file type filter prior to upgrade may have different results count after the upgrade.

Language percentages shown in the document view may vary slightly: In some situations it is possible that if language percentages shown in the document view may vary slightly depending on whether it was processed in v6.x or in v7.x. For example, it is possible that a tiff OCRed may show 100% German and <1% English in v6.x and 100% German in v7.x.

Email display names with two names may only be displayed in Symantec eDiscovery Platform as having one name: An email display name containing multiple names separated by spaces and a "&" or an "and", such as Jonathan & Jane, may be displayed with only the longest name. However, the entire name is searchable both via the participant picker and via search.

Some searches may appear to find documents that do not match the specified criteria because the data that matches is not displayed: Searches may hit on document metadata that is not displayed when viewing the document. This is particularly true for metadata of documents within other documents, such as photos within a PowerPoint file. The metadata from the photo (for example, the name of the camera or the shutter and exposure settings) is searchable, even though it is not displayed when the PowerPoint file is rendered as HTML.

Files that fail to open in HTML: Certain files may fail to open in HTML view. For example, if the converted HTML file is greater than 30MB, such a failure will occur. When this happens, users can open the file in its native application by clicking on the download link.

Displaying large files in the document view: If a loose file's HTML rendering exceeds 200,000 bytes, then it will not appear "in-line" in the document view. Users will be notified that the document was too large for inline viewing, and instructed to click on the Open as HTML link to view the file contents in a pop-up window.

A change in the "Display Microsoft Office Documents" setting only goes into effect on the next page reload: *If a user changes their "Display Microsoft Office Documents" preference setting from "In browser" to "In desktop application" or vice versa, the change in behavior will only take place on the next page reload. After changing this setting, users should reload the page by selecting Refresh on their browser or pressing F5 on their keyboard. The change in behavior will also take place if the user clicks next page or runs a new search.*

Email folder search is not supported for archive sources: Processing and searching of email folder information is not currently supported for archive (HP IAP/Symantec Enterprise Vault) sources.

Finding similar documents in a large data set: In a large data set (3 million documents or more), documents with many similar matches may take 10-15 seconds to return a count of available similar items.

Searching for email addresses: When searching for an email address in Basic search or the Keyword section of Advanced Search, the application will only match the original email address. Use the new Participant search area in Advanced Search to find more general matches.

Different behavior for upgraded saved searches containing "w/" and "NOT w/" strings: Cases upgraded to v6.0 or later with saved searches that contain strings of the form "w/2" will result in a query engine error. Those that contain strings of the form "NOT w/2" will treat the string as a search term. Any new searches will interpret search terms in this form as meaning "within 2 words of". To use the new search syntax with existing saved searches containing terms in that form you will need to recreate the saved search.

Review and Redaction

Files with special characters in filenames cannot be downloaded (29480): For cases created in v4.5, when upgraded to v 7.1.3, if the data has files with special characters in filenames, downloading or export such files will fail.

Rendering of documents in the native viewer: When determining whether to use the actual native application (for example Microsoft Office, Word, and PowerPoint), to generate the native view of a document. Native view is constructed by opening the document with its creator application (Word 2010) and creating the page view which shows the document as it would look if it was printed. Symantec eDiscovery Platform uses the extension of the file instead of the strong file type that is used for file type identification during processing and search.

The following are the extension mappings for the natively-rendered document types:

- Microsoft Word: doc, docx, rtf, docm

- Microsoft Excel: xls, xlsx, xlw xlsb,xlsm

- Microsoft PowerPoint: ppt, pptx, pps, ppsx, ppsm

- Microsoft Outlook Email: msg

- HTML: html, htm

- Images: bmp, png, gif, png, jpeg, jpg, tiff, tif

- PDF: pdf

Note: If an extension mapping is not available, then the document is first converted to a PDF and submitted for native review.

Setting up saved searches for unreviewed documents: If you are performing a multi-pass review in which you have multiple tag sets that are active (for example, one for the initial pass and another for the detailed review), you may have some users who do not have visibility to all of the tags sets. When doing a "Find documents that are not tagged" search in the context of those users, note that documents that have not been tagged in ANY tag set will be returned, including those that the user may not be able to view. Thus, if those users are setting up saved searches to provide them with their current set of unreviewed documents, they must do an explicit "None of these" tags search on their tag set instead of using the "Find documents that are not tagged" option.

Assigning reviewers access to check out a batched folder: If your system has assigned folder access based on user roles, since newly created folders must have access permissions set per role that means that folders created using the batching feature must have access permissions set manually for user roles.

Auto dates in Microsoft Office documents are different in the HTML view and in the native view. The HTML view is constructed using the text content of the document. However, the Native view is constructed by opening the document with its creator application and creating the page view which shows the document as it would look if it were printed. If the document contains automatic/calculated fields like "Current Date" then that field will be interpreted and updated by the creator application at the time the page view is created. For this reason, there may be discrepancies between the content displayed in these two views.

Printing and Export

Because EMLX part files are not reported during export, the counts on disk and in the summary.xml file do not match (26918): If you have EMLX files that are comprised of many parts, your export counts on disk will not tie out with data reported in summary.xml.

Template mapping is by column number and not by label (19733): While all of the field selections during load file import setup appear to be based on the names of the labels, the mapping is in fact done by column number and is saved as such in templates. For example, if the first column in your load file is "BEGNUM", any occurrence of "BEGNUM" in your settings will be understood instead as "Column 1" when you save your template.

Multiple copies of the same document may be exported when de-duplication is on and the job is retried after a partial completion (7216): If a particular source is completely off-line during an export, then the job may fail as partially completed. If the source is brought back on-line and the export retried, documents that were already correctly exported because they were accessible from another source may be exported a second time for the newly-available source.

Metadata export of extremely large numbers of documents causes out of memory error (16066). Exporting an extremely large number of documents at once can cause the appliance to run out of memory. Chunking export jobs into smaller sizes such as 100,000 at a time should not cause memory errors.

PDF "tree view" does not reflect actual attachment names (4916): When generating PDF reports, the eDiscovery Platform adds attachments to a "tree view" in the PDF for easier navigation. In rare situations with large PDF files, the actual attachment name may not appear and instead an internal name such as "'doc-attach-0.7.8.15398-0.pdf'" may be shown.

Summary file contains total exported documents: Starting with 7.1.1, export jobs will update the existing `summary.xml` file with the total number of documents exported instead of creating a new and separate `summary.xml` file for each export job.

Compressed option for job output when export output is on an external location: When running export jobs within the eDiscovery platform when the export output location is on a network share, the application does not zip export job related files even when you choose the zip option

Exporting of jobs in zipped format that contain CJK characters: To open export jobs in zipped format that contain CJK characters, make sure you are using a tool that supports Unicode characters to ensure that filenames are displayed correctly.

Format of "locations" in XML exports: Symantec eDiscovery Platform includes the original source location where a document was processed from in its XML export, and presents it as a URN.

Handling of files that Symantec eDiscovery Platform is unable to print: The application will indicate when files or attachments, such as unsupported file types, do not print by providing a "Could not print attachment content" error message in the print output. Note that the print job will indicate success even if certain files fail to print.

Limits on maximum file size for PST export files: Symantec eDiscovery Platform limits the maximum size of PST export files. Administrators can configure these limits. 500MB is the default size limit. If these limits are reached while generating a PST for export, then the documents will be distributed across multiple smaller files named "[filename]_x.pst" where <x> is used to number the files.

If you choose to export in Outlook 97/2002 format, ensure that the PST export size is no greater than 2GB. To configure the maximum file size limit, set the **esa.pstexport.max_file_size** property from the **Support Features** > **Property Browser**.

Handling of long paths in native-only exports: If you choose to preserve the original folder structure when exporting native-only documents, the length of your export paths may exceed the standard Windows path limit. If this occurs, then the application will place files into an exception folder. The limit can be changed by modifying the **esa.jpstexport.longfile.oslimit** property (the default is 256). Note that WinZip and standard Windows file copies may have issues handling paths greater than 256 characters.

Rollover of XML exports: If you reach the document limit during XML export, Symantec eDiscovery platform automatically creates a new XML file to store the overflow documents.

Note: If your export includes Lotus Notes messages, all Notes messages will still be placed in a single NSF file (found in the first native file export directory).

Handling of large exports: Exports of less than 2GB will be zipped and made available for download through the "Pickup" window. Larger exports will have to be accessed directly from the appliance. In both cases, a small information bubble will appear in the pickup window to notify the user of the job number of the export so that the eDiscovery platform administrator can access the files directly (the files will be located in the directory: `<esa_root>\data\filemanager\<username>\jobRun-<jobid>`. Administrators can turn file zipping on or off.

Error handling when exporting attachments in metadata exports: If an attachment can be accessed but cannot be fully exported because it is too long or there is some other issue in producing its content in native or text form, the export job will still complete successfully. Symantec eDiscovery Platform logs attachment-level errors "in-line" in the export metadata file and they can be analyzed on import into the downstream review platform (or the XML file can be searched for such errors).

Treatment of embedded objects during export: When extracted text is generated during export, the extracted text will contain the text of the parent and all of its embedded children. This is to ensure that a native file is not inadvertently produced downstream because it was not responsive to a search on the extracted text of the parent object if the embedded content was excluded. The extracted text of the embedded object will also be generated separately with the embedded object, if you choose to include embeddings in the export/production.

Exporting an NSF source with attachments separate from the message fails when the attachment size is greater than 1GB: In order to avoid this scenario, when exporting a

separate attachment greater than 1GB change the esa.queryengine.contentretrieval.timeout.ms property to a higher value.

Incorrect counts in the summary file for native export: The total unique messages processed count may be incorrect for exports that contain messages that have either an Exchange source and at least one other type of locator. PST and loose files will be counted twice in the total unique messages processed.

Long attachment names may fail during production export for upgraded cases: For cases upgraded to 6.1 or higher, any long path that is already in the file cache for the production document set needs to be evicted and re-cached; otherwise, production export will fail. Cases created in 6.1 or higher will not have this issue. Contact Symantec Support for assistance.

Exporting a message that has a sent date in the future will have an incorrect sent date when exported: Depending on the original sent date, this behavior may affect de-duplication behavior, as the sent time is one of the parameters.

Exporting an NSF file fails if the export destination path name is too long. When exporting a document set that contains Lotus Notes files, if the pathname of the directory where the export is being written to is very long or contains a comma, the export will fail due to Lotus Notes API's inability to handle long path names and commas.

Load File Import

A valid summary.xml file is required in the top level source directory in order to import tags if the option using Clearwell tagging syntax is selected (37270): A valid summary.xml file is required in the top level source directory in order to import tags if the option using Clearwell tagging syntax is selected. The platform checks for the existence of the file and issues an error if one is not found.
Note: The summary.xml file contains the export version and the format of the tags to be used. For more information, see the version 8.0 Load File Import Guide: "Preparing to Import Load Files – Apply Tag Formats".

Validator phase taking excessive time on an LFI case where source path is not available to populate rendition table (30854): If you upgrade or restore a case with LFI sources without providing access to the sources' path and then rerun post-processing with the source path available, the imaging status tags will not be updated, but will (continue to) identify the items as "3rd party candidate - rendition source not available. Make the rendition source available and submit the items for native imaging.

If you upgrade or restore a case with LFI sources while providing access to the sources' path, then image analysis and tagging will tag all the docs as "TP Candidate-rendition source not available". Make the source available and you can continue to do native review of the docs even if the image status tags are incorrect. Also, the post processing state for rendition flag will be set as stale and show up in sources /pre-processing page when LFI source is not available during upgrade or restore.

Custom fields should not have the same name as extended metadata fields (22171): When creating custom fields, you will need to ensure that the names of the fields do not match any Symantec eDiscovery Platform standard fields nor extended metadata fields that may be present in your files.

Container files do not display content in text view (21075): When container files get imported, the content of the contained files gets indexed but the contained files themselves do not get

extracted. Because of this, the text view of a container file will not show the content of the contained files but rather it will display a text render that contains a list of the contained files.

During Load File Import users need to specify FileName and file extension (19756): As per specification, FileName is a mandatory field. If not specified, the file (loose file or attachment) will be dropped during discovery.

Text qualifier and field separator characters must be escaped: When making the settings for the load file import, you need to specify both the text qualifier, field separator, and escape characters. If the text qualifier or field separator characters appear in the value of a field, then you must ensure that the characters are properly escaped using the escape character.

Discovered size and processed size may be different: Discovered file sizes are determined by the disk size of the files to be imported, but processed data sizes are determined only by the content in the files. This may result in a difference between your discovered sizes and processed sizes.

Production

In version 8.0 we introduce the Document Image Helper service (EsaImageHelper service). Image Helper expedites document conversion and handling of typical Microsoft Office documents in native view. HTML files, .msgs, and Microsoft Office documents (such as Word documents, Excel and PowerPoint files) will first be submitted to Image Helper to be converted to PDF before sending to IGC.

Change in production behavior for attachments not included in a production due to Item Level View changes (37810): During Item level production with "include natives" option on, if an attachment for a message is not included in the production, the native message will not be included. A placeholder slipsheet text file will be generated with the following information:

- The text file will have the following postfix: "_Not_Included_In_Production_Slipsheet"

- And the following text within: "This document family member has not been included in this production, ID: xxxxxx

Regardless of attachment type (whether attached message or attached loose file), the placeholder slipsheet will always exported as an attached loose file. Therefore during the import of such attachments they will be treated as attached loose files.

Cache Analysis feature may display inconsistent page counts for some .xls or .doc files (31319): In some cases, estimated page counts for .doc or .xls files can be indexed in caches on multiple partitions. Depending on which instance the analysis tool finds first and which criteria are skipped during analysis, the page count can be different in the review interface from that of a file in a production folder. This will not happen in most cases with these file types, but is possible if the user has explicitly turned on the page counts for Word and Excel files.

During review, the list of available redaction reason codes displayed are limited to those which had been applied at the time the current document was loaded into the native viewer (28720): In some cases, email messages cannot be imaged using near-native imaging (for example, if they contain links to content on an inaccessible server). Symantec eDiscovery Platform will automatically image these messages using a 'best-effort' rendering that preserves all of the content but does not preserve the near-native view. These items will be tagged with the imaging status tag "Basic-native".

Image Import report is blank for cases with .tif import job upgraded from a previous release (29569): Symantec eDiscovery Platform has changed the location and format of the image import report. Upgraded cases will have an empty report for imports completed prior to upgrade.

PDB file types are part of "non-imageable" slipsheet category (26772): After running a production, files of this type are slipsheeted with the reason: "Non-Imageable File" and "SSType: SS_INVALID".

When Utility Nodes are used for processing, page counts for Excel and Word documents are reported inconsistently with page counts given in the Review and Production Folder UIs during cache analysis (26739):
This is expected behavior for cases that are indexed on multiple partitions (when utility nodes are used for processing) and items are not deduplicated between them, and when the page counter is enabled for Excel and Word files during cache analysis.

The BCC field will not be shown in natively viewed/produced Exchange messages (11478):
Because the default Microsoft Outlook printing template supplied by Microsoft does not include the BCC field, BCC'ed recipient will not be displayed when viewing or redacting in the native viewer, or producing native Outlook email messages in image format.

Header and footer values in adjacent regions may "bleed over" into other regions (11294):
The production header/footer regions do not currently support word-wrapping within their respective areas. Thus, care must be taken to ensure the field or text in one region does not spill over into another adjacent region. Preview your productions in the user interface before exporting large productions to ensure that the header and footer regions appear as expected.

Some special characters in production numbers will be replaced when creating files during export: If characters that are not allowed in filenames are used in creating production (Bates) numbers, those characters will be replaced with an underscore ("_") if you choose to use the production number for naming files on export.

Estimated production and export performance: The combined time to produce and export pre-cached documents from Symantec eDiscovery Platform on the current (Dell R710) hardware platform should be between 5,000 and 10,000 pages per hour. If you are experiencing production and export times that are substantially different from this rate, contact Symantec Support. Also note that, in general, the application is optimized for productions with 200,000 pages or less. If you are planning to perform a significantly larger image-based production, contact Symantec Support for guidance.

Backup/Restore

For foreign cases not part of the original Symantec eDiscovery Platform node, backup "migration incomplete" message continues to show up in UI post upgrade to Cascades (31207): There are a couple of scenarios where users might see this: the fix is the same for each.

1. If the user still sees the message migration incomplete after reboot of application service, the user should check the backup location to see if any backups are not migrated to "Cases" folder. If there are valid backups that are not migrated, the user can manually move them to the "Cases" folder and the "migration incomplete" message will no longer display.
2. "Migration incomplete" also displays when the backup location is shared by multiple servers that are not part of a cluster. In this case, again moving valid backups to the Cases folder will work.

On case restore, you must restart the Symantec eDiscovery Platform services in order to see the scheduled jobs for the case. (22025).
Perform regular backups: Administrators are encouraged to perform a backup after each successful completion of the crawling and indexing process, and establish a regular backup schedule during an active case. Refer to the *Symantec eDiscovery Platform System Administration Guide* for more information.

Blank characters at the end of the case name may result in the backup failure (22022): To ensure successful backing up of cases, your case name must not contain any trailing blank characters ("Sec vs Tamas Corp ").

Transparent Predictive Coding

After upgrade the entire Controlled Prediction Accuracy Test is cleared without any indication message (32358): If you have run a Controlled Prediction Accuracy Test for a case using a previous release, then after upgrading to 7.1.4, you must recreate the initial and additional test sample data for the upgraded cases. For more information on the Controlled Prediction Accuracy Test, refer to the Transparent Predictive Coding User Guide.

Miscellaneous

Property names are case-sensitive: When modifying Symantec eDiscovery Platform properties (a task only performed by system administrators), keep in mind that all properties are case-sensitive. Therefore, if you are setting the `esa.case.backupDir` property to a new value, ensure that you do not inadvertently specify `esa.case.backupdir` as the name of the property that you wish to modify.

Known Issues

This section contains known issues related to the usage of Symantec eDiscovery Platform.

Installation and Upgrade Issues

Product install or upgrade: account password verification fails if password includes a double quote character (36374): When installing Symantec eDiscovery platform, if the installer's password contains a double-quote '"' character, the account verification fails during installation or upgrade. The only workaround is to change the account password for the affected account. **Note:** For service accounts (e.g. PSTRETRIEVER) that have a password with a '"' character, this issue also causes them to fail password verification if the user re-enters the password during the installation steps.

See tech note 223142 for an example of an installation log error: http://www.symantec.com/business/support/index?page=content&id=TECH223142

Node backup/restore issues when Nexidia is not installed (34675/34683): In both cases, the backup or restore will not complete due to a missing folder that is indicated in the Clearwell Utility's failure message. The workaround is to manually create the folder specified in the failure message and proceed with the backup or restore. This tech note gives an example of working with the backup failure: http://www.symantec.com/docs/TECH214657

Cases upgraded via version upgrade will fail post-processing if the upgraded case has a trailing space in the case name (30972): Upgraded cases with trailing space in case name will fail in post processing. Also pre-v7.1.2 case backup will not be visible in archives tab of v7.1.2 Fix2 appliance if the case name contains a trailing space.

Installer Improvements: Customize CW location (27844): This feature is meant to allow the user to be able to specify where Symantec eDiscovery Platform and its associated third party software is to be installed. However, this feature is impacted by the issue ***31495*** below:

Node restore fails on alternate drive letter when trying to restore from a backup taken on D: from another appliance with "Directory D:\Clearwell Packages creation was not successful for an unknown reason" error (31495):
With the 7.1.3 release, the eDiscovery platform now supports installation on a local drive using a drive letter other than D:. However, the node restore must be performed onto a system on which the eDiscovery platform is located **on the same drive letter as the system from which the node backup was taken**. For example, a node backup from a system with the eDiscovery platform software located on the S: drive cannot be restored to a different system with the application installed on D:, or H:, instead it must be restored to another system where the S: drive is being used for the eDiscovery platform software installation. For more information, see this Tech Note: ***http://www.symantec.com/business/support/index?page=content&id=TECH223272***

Nexidia fails to start after renaming the host name (33904): If a machine's host name is changed, Nexidia fails to start. As a workaround, update the following files with the new hostname:

```
C:\Program Files\Nexidia\Search Grid 2.0\etc\local-properties.xml

D:\CW\V80\scratch\esa\esa.properties
```

Legal Hold Issues

A legal hold notice being modified by multiple users or in multiple browser windows causes custodians, survey questions, or other information to be lost after saving (31274): The potential for this to happen is eliminated by having one user modify settings for the legal hold in only one window until the hold notice has been sent.

Images and image hyperlinks included in a legal hold notice are not rendered in the emails (ESA-37961): When images and image hyperlinks are included in the legal hold notices and when such notices are sent, the resulting emails does not show those images and image hyperlinks.

Identification and Collection Issues

Collections from IMAP client initiated Exchange Mailbox archive and Internet Mail archive result in failure: Enterprise Vault 11 supports IMAP-client-initiated archiving into both Exchange Mailbox archive and Internet Mail archive. The IMAP-client-initiated archives store messages in EML format. As Symantec eDiscovery Platform does not support collection of EML files from Enterprise Vault, the collection tasks that include IMAP-client-initiated Exchange Mailbox archive and Internet Mail archive result in failure.

Mailbox messages from the EV mailbox archives and Journal messages from the EV Journal mailbox archives are deduplicated (35410): This is a known issue in 7.1.5. For collections from the EV Journal archives with Envelope Journaling enabled, messages are deduplicated against the same messages collected from the EV mailbox archives. Expected behavior is for the journal and mailbox messages not to be deduplicated.

For EV Collection, the Scanned count does not match with the Collected count for Re-run tasks (35132): This is a known issue in 7.1.5. For EV sources, when collection tasks with a partial success status are rerun, the collection task is completed successfully. However, the Scanned count does not match with the Collected count. The Scanned count shows the count from the first run of the task only.

For EV File System Archive collection, a retrieval task does not collect all the discovered search hits (34576): For EV File System Archive sources, when a collection task is run, the sum of the successfully retrieved items and the failed items during retrieval does not match the number of discovered search hits.

"Failed to retrieve settings" displayed when attempting to edit large EV collection task (31077): When users try to edit an EV collection task with a large number of archives, typically greater than 131,000, the error message "Failed to retrieve settings" is displayed. For Enterprise Vault searches, holds, or collections targeting more than 50,000 archives, either select entire Vault Stores, or create multiple tasks targeting up to 50,000 archives at a time.

EV Search task fails if scratch disk space is unavailable (32728/36202): If you see an error in the job log such as "Got an unexpected exception from a searcher thread: 422302 EV searcher error - 440,873 Searcher exited abruptly, check if the source account configured with the associated source is part of "Local Administrators group", and then user should also check if enough scratch disk space is available.

Entire data is not collected from DSM using a search query (32827): Exchange collection task configured to collect data from a Discovery Search Mailbox using a search query whose results are saved using the options 'Include Unsearchable' and 'Enable de-duplication' does not collect the entire data. It is recommended not to combine the 'Include Unsearchable' and 'Enable de-duplication' options while creating a search query.

Keyword-based filtering does not work for Exchange collection tasks (33056): With collection tasks targeted for Exchange mailboxes, Keyword-based filtering does not work for the Cc and Bcc fields. It works only for To, From, Subject fields.

Keyword-based filtering does not work for emails formatted as rich text (RTF) (33084): With collection tasks targeted for Exchange mailboxes, Keyword-based filtering does not work for mails formatted as Rich Text (RTF). Keyword search works for mails formatted as Text or HTML.

Custodian assignment not working properly for certain filtering rules (33130): If you are assigning custodians for OnSite Macintosh collection tasks using the following Custodian Assignment filtering rules, then a custodian is created and all collection tasks are assigned to this custodian. If you assign the same Custodian Assignment filtering rules for subsequent collection tasks and assign custodians, the custodian assignment happens to the first user only irrespective of the user profiles or Macintosh version.

Custodian Assignment filtering rules:

Assign Items to Custodian in priority order as follows: Assign to Custodian based on item's domain/owner name or SID

If No Match is Found: Create a New Custodian using the item's SID and associated owner name

Data is not collected from Office® 365 archive mailboxes (33134): For Office® 365 sources, a collection task can collect data from the main mailbox or the dumpster. If the Office 365 mailbox has an archive mailbox, then the data from the archived mailbox is not collected.

Disallowing options to collect everything from a subset or all Exchange/Domino servers (32955): Symantec strongly recommends not to select the **Include all mailboxes** or **Include only the following servers** options to avoid over-collection from the Exchange and Domino Mailbox sources, and to avoid overload on your email messaging system.

An error is thrown when a large number of archives are selected in the EV.cloud collection tasks (ESA-39635): While adding a collection task for an EV.cloud source, if you enable the ""Selected"" option on the Archives field and add a large number of archives (may be more than 150 archives), you might get a ""BAD_REQUEST"" error. If this happens, you should either remove some archives from the selection or you should create multiple collection tasks with fewer number of archives.

Deleted and hidden accounts are also discovered while performing discovery for EV.cloud site (ESA-32713): The system automatically discovers all accounts on the EV.cloud site. The system also discovers the deleted and hidden accounts from the EV.cloud site. So the actual number of accounts on the EV.cloud site and the number of discovered accounts on the system may not match.

Collection tasks fail when the data includes characters from different encoding formats (ESA-38632): Symantec eDiscovery Platform supports collection of data in UTF-8 encoding format. Therefore, if the data being collected contains characters other than UTF-8 format, the collection tasks fail.

Archive picker does not show the correct size of the collected data (ESA-38204): When a collection task for EV sources is run without any filter, the size of the collected data and the size of the data on the Archive picker does not match.

EV Search task cannot preview messages in a virtual environment (ESA-39300): In a virtual environment containing a Cluster Master Node and Sub-Nodes, when you run an EV Search Task, the "Sample Preview" doesn't show up the messages. This issue occurs only in a virtual environment and it is not observed when eDiscovery Platform runs on a physical appliance.

Items in the 'Recipient Cache' sub-folder of Contacts are not getting collected on applying date filter (ESA-38911): While collecting data from the Office 365 Exchange sources, if a date filter is applied, items in the 'Recipient Cache' sub-folder of Contacts are not getting collected. The 'Recipient cache' sub-folder is maintained by Exchange for internal use and does not contain any user generated data. Hence this behavior can be safely ignored.

OnSite Collector for windows fails to be launched (ESA-37512): When launching the OnsiteWindowsPC collector from an MSI installation folder which name contains spaces, the Onsite Collector cannot be launched.

Rerunning collection tasks for dumpster in Exchange also collects previously collected data (ESA-37173): For Exchange Mailbox collections, when a collection task is re-run to collect new or modified data, the system collects the previously collected data from the recoverable items folder (dumpster) instead of collecting only new or modified data.

SharePoint collection through an authenticated proxy fails (ESA-37113): For SharePoint sources, authenticated proxy login is not supported. A collection task fails when authenticated proxy login is used.

Direct Domino collection fails when Keywords are specified as criteria (ESA-36938): For direct collection from Domino sources, a collection task fails when keywords are specified as criteria. However, when keywords are not specified, the collection tasks are completed successfully. To avoid this situation, it is recommended to keep the retry counts more than zero.

Processing and Post Processing Issues

Cannot navigate to Collections or Legal Holds after visiting Internal Errors page (39390): In this case the user sees a java script error and cannot navigate to either Collections or Legal Holds. Navigate to Case Home or Analysis and Review, and from there navigate to Collections or Legal Holds.

Near duplicate isolated item is not correctly handled in a discussion thread (37229): If the isolated document is a near duplicate of another message and is part of the same discussion thread, the document is isolated from regular keyword search. However the document will still be seen in the discussion thread view and also in review mode under the related items panel.

Data Analytics show isolated document count (36956): When there are internal errors and Analyze by Tag Status or Folder Status are used in Data Analytics, the counts shown include the isolated documents as well.

Exception page is still showing items that are isolated on the search side (36649): When there are internal errors, the exceptions page in the Processing tab shows the isolated documents as well.

RMS-protected embedded .msgs are not decrypted during export (34270): For an RMS-protected message containing an embedded RMS message, the RMS-protected embedded

message is not being decrypted during export. This issue is being addressed with the third party vendor.

Metadata Export and Review failure for RMS-protected messages with containers as attachments (34582): For version 7.1.5, users were told to check "Breakout attachments as separate items" and uncheck the "Breakout Embeddings as Separate Items" checkboxes as a workaround.

In version 8.0, the only scenario in which metadata export and review do not work and still require the workaround is when the source PPT file is a zip or LEF source, as opposed to a loose file (**35431/33404**).

LEF decryption is not occurring during export (both metadata and native) (34996): Decryption will not occur during export of RMS-protected documents inside containers which are part of an LEF file**.**

RMS-protected loose files are dropped during processing (33281): If a file extension is missing or incorrect, then a loose file will be not be decrypted.

Audio report jobs always showing "Running" status (33029): Under certain conditions, report jobs for processing may display their status as **Running**, though the job is **Pending**. This is a cosmetic issue and does not affect the generated report.

Analysis and Review Issues

Unable to re-run search after editing a failed search that caused too many combinations (38919): Selecting a folder constraint (such as "any", "all", or "none") and triggering an error, then clicking "Back" to edit the search triggers this. Avoid using the back button in this case: use the search navigation links (such as the "Advanced Search" link) to revise the search.

Audio case is processed with multiple languages, but only one is shown in the yellow message or attachment header box (38739): The yellow box will not show both languages, but searches will work in them both.

Filters not being populated while analyzing a discussion thread with an internal error (38461): When there are internal errors while processing a case, filters in the Search and Review page will not be populated while analyzing a discussion thread.

Matching emails count on "select variations window" from advanced search includes isolated document count (37233): When there are internal errors while processing a case, matching email count in the select variations window in the advanced search panel will include the isolated documents as well.

Duplicate attachments with different file names are not handled correctly on Files tab (37161): When there are internal errors while processing a case and there are duplicate attachments with different file name that are searched with a valid file name, the isolated file is also included.

Viewing search results of a saved search displays isolated documents (37103): when there are internal errors, saved searches need to be re-run to see the results.

Production summary statistics do not reflect documents isolated from that folder (36389):
When there are internal errors, the item count shown while editing the production folder includes isolated documents. The count shown while searching on the production folder is the correct count.

Filter sorting by count order does not toggle with the new doc/item count toggle button (35417): Toggling will not re-sort the order for a filter. Filter sort order has customarily been either item or doc based, depending on the type of filter. The inherent sorted order of the results will not change if you toggle between doc and item.

Audio search: for certain audio files, number of search hits can vary when the confidence threshold is changed (33202): This is a vendor issue and is currently being addressed.

Audio search: When media player is not available, clicking the page control doesn't advance the document (33150): If Windows Media Player is not installed as the CW installer indicates, the user may see a blank white box while trying to listen to the audio hits, and there will be loss of the ability to navigate the documents. Please refer to the Installation Guide.

Audio search: General Search Error displays when running two searches and the first one goes to the background (33012): When this happens, users are still able to run searches by going to the Advance Search tab. In the Advance Search page, users can change the threshold and run another search.

With consumption license enabled and mode set to standard, user cannot do native review: case settings can't be set to enable review (31400): If a case has an LFI source, if consumption license is enabled and mode is set to standard, the user will not be able to enable review from case setting once data is indexed. The case needs to be already set for review during case.

Tool used for indexing is not used for html view post fix 31343; this can result in anomalies and inconsistencies in product behavior (20110/31425):
20110: Because the indexer is now tracking the tool that was used for text extraction for a particular document, there is greater consistency in matching the exported extracted text to the indexed text. Users may notice some differences in extracted text between exports done in 7.1.3 when compared to the same export done in 7.1.2 and earlier.

Also, export will now flag text as having a text extraction error in audit files if "extended metadata" is selected for export and an error is encountered. This is new to 7.1.3.

31425: However, for loose files and attachments the same tool may not be used. Due to a limitation of the third party programs, the same tool may not be used to create text review or detail snippet view of a document, causing some inconsistencies in product behavior.

Audio search: When searching certain phrases, audio hits consistently start a few seconds later (32191): If the audio file contains large (>5 seconds) of silence, then the audio hits may be off by the same amount.

Audio search: No indication of how much audio license is in a case archive/backup (32862):
Currently there is no way of indicating to the user how much audio data is within a case backup or archive. This may be addressed in a future release.

Audio search: Nexidia Search Grid fails to process files with incorrect extension (32190): Files with an incorrect file extension (as opposed to no extension at all) are unlikely to be processed successfully. Incorrect extensions are likely to cause codecs to misinterpret the file, in which case the best result is a "Cannot Convert" error, and the worst result is a corrupt audio stream.

If the file extension is unknown to the **available** codecs, then Search Grid gives each codec an opportunity to decode the file. If a codec reports that the file can be validly decoded, processing will continue. Note that for the correct codecs to be available, DirectShow and (if Apple-specific files are to be processed) QuickTime plugins should be installed on the server plus Search Grid's internal codecs.

With consumption license enabled and mode set to standard, user cannot do native review: case settings can't be set to enable review (31400): If a case has an LFI source, if consumption license is enabled and mode is set to standard, the user will not be able to enable review from case setting once data is indexed. The case needs to be already set for review during case creation.

Load File Import Issues

User is not alerted to errors and finds no image files being loaded at all during native view (32314): Externally imaged items imported into the system will typically require:

- A load file referencing their content
- An Opticon file referencing the corresponding images.

If users incorrectly match items and their corresponding images between the load and Opticon files, the images will not be imported into the system. Users are advised to test mappings in a test environment prior to trying this in a production system.

For some LFI cases, user cannot sort by imported number (32763): There should be at least one custom attribute mapping for the user to sort by imported bates number in search UI. As a workaround, the user can add a dummy custom attribute mapping, and we should be able to sort an additional column by Imported Bates number on the search UI. See this knowledge base article: http://www.symantec.com/business/support/index?page=content&id=TECH217228

Export Issues

Export and Production with Image Help enabled seeing "file no longer exists" errors when doing a caching job for data from LEF (36960): When running a cache job for files from LEF source, multiple files fail caching with error "File no longer exists", due to resource contention. Retry the cache job when this occurs.

Export finishes in a partially completed state when the template has its tags or folders modified by a user in another session (35491): This issue only occurs when a user runs the export while a user in a parallel session modifies tags or folders at the same time. Users should not be modifying tags or folders while export is running.

Production export of a completed redacted embedding consistently fails when the export location is to an external NAS share, causing it to not work in a Distributed Architecture environment (33889): This occurs when the Windows Service Account that runs IGC services on the appliance does not have read/write access to the export location and/or to the image cache location, which may be located in a different machine. Follow the guidelines given for setting up accounts in the in the Symantec eDiscovery Platform Installation Guide.

Production fails during export for a case with a large number of documents (33523/35274): When this occurs, Windows server stops responding. If memory usage issues are encountered during export, the following Microsoft hotfix should be installed:

http://support.microsoft.com/kb/2582112

Export of journal message with more than 4000 participants creates a corrupted msg file (32184): It is not advisable to export a journal message with more than 4000 participants. This is a known issue where large messages or messages with large number of recipients will cause message serialization to fail during retrieval. An .msg file is created in a pdf format, which can be opened by the PDF reader.

Metadata export failure of ~2,000,000 items fails after ~650,000 items retrieved (29991): For memory and database performance considerations, internal testing has shown that the best practice is to restrict metadata exports to 500k docs or fewer. For larger quantities, breaking them into subgroups to be exported separately is advised.

Production Issues

Documents that are isolated from a production folder are produced (37436): When there are internal errors, isolated documents might appear as part of a production.

During review, the list of available redaction reason codes displayed are limited to those which had been applied at the time the current document was loaded into the native viewer (29786): This is a known issue due to a change in the Brava client. Redaction reasons applied in other documents will appear if the page is reloaded.

System Administration Issues

Node restore fails on alternate drive letter when trying to restore from a backup taken on D: from another appliance with "Directory D:\Clearwell Packages creation was not successful for an unknown reason" error (31495):
With the 7.1.3 release, Symantec eDiscovery Platform now supports installing the software on a local drive using a drive letter other than D:. However, the node restore must be performed onto a system on which the eDiscovery platform is located **on the same drive letter as the system from which the node backup was taken**. For example, a node backup from a system with the application located on the S: drive cannot be restored to a different system with the eDiscovery platform installed on D:, or H:, instead it must be restored to another system where the S: drive is being used for the software installation.

Fixed in Version 8.0

Identification and Collection

SharePoint collection takes long time for a single folder when the number of folders is large (29516): Previously, for the SharePoint collections tasks, the specified filter criteria were applied only after downloading all folders and the content of the specified SharePoint site. Because of this, the collection tasks used to take longer time to complete. With this fix in 8.0, the filter criteria are applied first while searching the SharePoint folder hierarchy. A folder is downloaded only when it satisfies the filter criteria. However, the scanned count for the collection task will no longer be the number of all contents of the specified SharePoint site.

Legal Hold

When updating an already created legal hold notice, updating the "Admin Bcc Recipient" field does not affect notices that have already been sent (31273): Since the 7.1.2 release, when creating a legal hold notice, the e-mail address currently set as the "Admin Bcc Recipient" is permanent for the life of the legal hold notice. Any changes or modifications to this field were applied to future legal hold notices, but did not affect any previously created legal hold notices. In the 8.0 release it is possible to add or change recipients for subsequent emails on existing notices, including System Administration and Custodian Notices, and you can add BCC recipients.

Processing

Restriction removed in discovering LFI documents that are messages and have non EML, MSG natives (37005/30426/26302): This fix removes the restriction on discovering LFI documents that are messages and that have non EML, MSG natives, when natives are not used for content or metadata.

Native View and Production of RMS-protected messages with RMS-protected attachments is not supported (33230): In version 8.0 Native View works for many types of documents including RMS parent, non-RMS parent, RMS attachments, non-RMS attachments, loose files, containers, containers as attachments, et cetera. Exceptions include scenarios where the parent item is non-RMS and there are multiple RMS attachments (**36297/36299**).

Re-provisioning of nodes during processing not advised (33630): This fix resolves an issue found in release 7.1.4, where re-provisioning a node before a job was complete was causing processing to fail.

When Native PST export fails, retrying export will not work (33116): In version 7.1.5, if Native PST Export failed**,** there was an issue with recoverable file generation, causing the export retry to fail. In version 8.0 clicking retry will work**.**

Load File Import Issues

Saving LFI Template causes "could not insert" error to display (35259/31406): The following error appears while trying to save an LFI Template: "An error occurred while creating the template: A Load File Import Template Name 80094 80065 A transaction operation failed. Error: could not insert: [com.teneo.esa.common.directory.AttributeMappingTemplate]". To avoid this, the template name should not exceed 255 characters.

Load File Import drops documents with warnings for a family tag set if its name has a colon in it (33804): In V713 and later versions, documents would get dropped during discovery with " Invalid Tagset property" due to the presence of a colon in the tag set name. The workaround then was to remove the colon in the tag set name. In V80 this issue has been fixed. Tagset names with colon will no longer cause documents to be dropped.

Reclassification of some fatal exceptions to non-fatal (35530/27737/21381): Now when discovery runs on a load file source, more error types are available in the load file pre-processing report (non-fatal errors). It is less likely that users will need to go to the discovery/remote job logs to find the errors (fatal errors).

The number of long text custom attributes is now configurable (29953): The number of long text custom attributes is now configurable as a case property with default value at 12. For configuration information, see the ***Symantec eDiscovery Platform Load File Import Guide*** "To change the number of long text custom attributes".

Need to define file encodings for Load and Opticon files has been removed (21711): As of release 8.0, users no longer have to define file encodings of load and Opticon files. Encodings should be automatically detected.

Export

Improved Tracking for Metadata/Production Export Jobs (34710): Version 8.0 adds the ability for metadata production export job logs to be periodically updated with the progress of the job.

Audio: export csv has email subject as file name for the instance where the hit is on the attachment (32853): This issue has been addressed in version 8.0 by changes to Item Level Export functionality.

Production

Production export templates do not show option to hide redaction reason when exporting a production (33256): This fix resolved an issue where the feature that gave the option to hide redaction reasons stopped being available. Now the option works as designed.

Custom slipsheet text does not support CJK characters (28353): The text in custom slipsheet text currently supports CJK characters.

Deprecated Features

This section lists features and options that Symantec eDiscovery Platform is deprecating. To assist customers with planning, the section includes features targeted for deprecation post-8.0 release.

Note: The post-8.0 deprecation list is subject to change pending product direction.

Deprecated in version 8.0:

- Identification and Collection Module Connectors
  - IBM Content Manager
  - HP Autonomy iManage
  - Xerox Docushare
- "Dominant Language" no longer available as an advanced search option

To be deprecated in the next release:

- Topics
- Identification & Collection Module Connectors – version support changes
  - EMC Documentum versions prior to 6.7
  - OpenText LiveLink versions prior to 10.2
  - IBM FileNet versions prior to 5.0

Under consideration to be deprecated in a future release:

- Concept Search
- Data source options for Processing
  - Exchange

    Direct processing from Exchange is being deprecated. Users must collect data from Exchange for processing.
  - EV

    Direct processing from Enterprise Vault is being deprecated. Users must collect data from EV for processing.
  - HP IAP
- EDRM XML Import
- Smart Tagging

Technical Support

To contact technical support:

- **MySymantec Customer Support Portal**

    https://my.symantec.com

    Note: Access to the MySymantec Technical Support Portal requires a SymAccount. If you do not already have one, register for a new SymAccount from the MySymantec Technical Support Portal.

Licensing Portal

If your Symantec product requires registration or a license key, access our Licensing Portal:

Symantec Licensing Portal
https://my.symantec.com/
Note: Access to the MySymantec Technical Support Portal requires a SymAccount. If you do not already have one, register for a new SymAccount from the MySymantec Technical Support Portal.

Obtaining Product and Compatibility Information

Refer to the full documentation set included with your software for related information and how to install, configure, and use other features of Symantec eDiscovery Platform.

To obtain this information from within the product:

- For the most current online and PDF versions of the documentation, click the **Documentation** link at the bottom of any page in the eDiscovery Platform.

- **Online help** — click the **Help** link in the product user interface.

External links

Access product information via these external links:

Corporate website

- Symantec Corporation Products Web site — http://www.symantec.com/business/products

Support Portal

- Release Documentation— http://www.symantec.com/docs/DOC7085

FileConnect Portal

- FileConnect Download Software (requires Serial Number) — https:fileconnect.symantec.com/

Supported Operating Systems and Third Party Applications

- eDiscovery Platform Compatibility Matrix —
  http://www.symantec.com/docs/TECH211911