

Viewpoint 5.5 Release Notes

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What's New in Viewpoint 5.5?

Note: Release notes are not meant for end user distribution. Items in blue are recommended to be communicated to end users.

Common	Help Menu	Direct link to Viewpoint support site added to Project tab of the Processing application and the Dashboard of the Review application.
	Legal Hold	Viewpoint's Legal Hold Notification System is a SaaS offering and is available as a hosted application through Lateral Data's cloud.
	Review MSI	Install for Review MSI on Terminal/Citrix Server simplified. A single upgrade file will now be provided (as opposed to three previously). Double click the 'setup' file to launch the install wizard. Upon completion, the Viewpoint dummy icon will be replaced with the Lateral Data logo.
	Reports	All reports are now accessible from within the Viewpoint application. Processing reports can be run from the Processing application. Review reports can be run from the Review application. Users will be restricted to running reports for only those projects they have access to.
	Reports	SQL reporting services is now obsolete. The SSRS reporting page should no longer be used. All reports must be run from either the Processing or Review application.
	Reports	In an effort to optimize each report, small data changes may be present. Report formatting has been modified for better look and consistency. Report descriptions and column names have been changed where appropriate.
	Reports	The following changes have been made. • 'Aggregate Date Usage' has been removed. • 'Data Inventory (Dupes Excluded)' and 'Data Inventory by Custodian' combined with 'Data Inventory'. • 'Issue Tag Confidence' renamed 'Issue Tag History'. • 'Production Tag Confidence' renamed 'Production Tag History'. • 'Language Identification Multi' and 'Language Identification Single' combined.
Processing	Fields	'Contains Color' field added to distinguish between documents containing color and those that do not.
	Fields	'Is System File' field added to flag documents identified on NSRL database.
	Fields	'Tiffs Total Size' field added to display file size of generated TIFF.
	File ID	Create text and extraction supported for MS One Note 2007 and 2010. Contact viewpointsupport@lateraldata.com to configure.
	File ID	MBox file type support added. Contact viewpointsupport@lateraldata.com to configure.
	Metadata	The following metadata fields are now captured. • Email Sensitivity • Meeting Start Date • Meeting End Date
	Miscellaneous	Improved error messaging when unable to create a new project due to model database being locked.
	Miscellaneous	Added ability to use spacebar to check selected record.
	Miscellaneous	Ability to clear all filters in Process tab. Small button located in the bottom right hand corner of the Entity section of the

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		ribbon bar.
	Miscellaneous	Ability to paste rows from MS Excel file into Custodians window in order to bulk insert records.
	Process Tab	Ability to run user generated scripts from UI in order to search for documents based on specific elements.
	Project Settings	The following settings have been combined to a single 'Track Changes' setting. • Print Format Changes • Print Ink Annotations • Print Insertions and Deletions • Print Markup Area Highlight • Revisions Mode • Revisions View
	Project Settings	New 'Clear Paragraph Formatting' option. False by default.
	Project Settings	'Full Color' value for 'Color Settings for Efiles/Emails' setting changed to 'Full Color or B&W'. When using this setting, Viewpoint will use color TIFF for colored pages and black and white dithering for non-color pages.
	Security	New 'Clear Workflows' permission to restrict users from the Clear button in the Workflows tab.
	Security	New 'Modify File ID' permission to restrict users from updating any File ID settings.
	Security	New 'Access Reports' permission to restrict users from the Reports module.
	Viewers	Native viewer replaced with Oracle Outside In Viewer to increase support for viewable file types.
	Workers	Ability to batch to multiple workers.
Import	Import	Ability to manually set encoding type for load files.
	Import	Added built-in delimiter and text qualifier options for Concordance load files.
	Import	Better handling of zeroed out date/time values (00/00/0000).
	Import	Ability to customize delimiter between email addresses.
	Import	Skip DPI conversion for documents with incorrect DPI metadata.
Quality Control	TIFF on the Fly	New warning flag to isolate documents which were Tiffed on the Fly from the Review application.
Review	Automation	When checking out documents, user has the ability to choose 'Custodian' and documents in batch will be queued up in alphabetical order by Custodian.
	Forms	New feature to facilitate multi-tenant Review. This feature allows for multiple parties to conduct separate yet simultaneous reviews within a single Viewpoint database. The high level addition to Viewpoint is adjustable Tags panel and field templates dependent on user/role access. Upon upgrade (or creation of new projects), a single 'Global' Form will be created with all current Tags and fields. This Form will be multi or single selectable depending on the 5.4 project database setting. See 'Viewpoint Forms Manual' for additional information.
	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags and fields displayed in the current layout.
	Global Search	Addresses, Metadata, Tagging Filter and MISC filter tabs added to Global Search.

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	Miscellaneous	Current View Search feature added to support Global Search functionality only for the selected View.
	Options	'All' selection in Family Tagging Mode option renamed 'Production Tag and Issue Tag'.
	Options	'Fast Mode' added. When ON, the document grid will automatically move to the next document after a Production Tag is selected. The current Form must be single select and the Production Tag selected cannot have any nested Issue Tags.
	Paging	Keyword Search panel re-executed when moving to the next page on the Documents panel.
	Print Documents	Ability to print a cover page between documents when printing TIFFs.
	Save Documents	Ability to name saved file as Parent Doc ID_Doc ID.
	Tags	Ability to expand Production Tag without tagging the selected document. User can click the plus sign to the left of a Production Tag in the Tags panel to expand and view the nested Issue Tags. Expanded tags will remain expanded when switching between documents.
	Tags	Ability to designate Production Tags as 'read only' so that they may be seen by a user in the Tags panel but not modified. See 'Viewpoint Forms Manual' for additional information.
	Viewers	'Prod TIFF' viewer to 'Production Image' viewer.
Redaction	Miscellaneous	'Left' renamed 'Counter-Clockwise' and 'Right' renamed 'Clockwise' in Rotate options.
View Manager	Custom Fields	Ability to change the display order of Custom Fields created from Processing.
	Forms	New Forms menu added. User can switch between available Forms to adjust the currently available filters.
	Forms	Forms Manager added to Setup menu to allow project manager to create, edit or delete Forms. Upon upgrade (or creation of new projects), a single 'Global' Form will be created with all current Tags and fields. This Form will be multi or single selectable depending on the 5.4 project database setting. See 'Viewpoint Forms Manual' for additional information.
	Miscellaneous	BegBates_Ing filter window added to MISC Filter tab.
	Miscellaneous	New 'Exclusion' Organization Code created by default for all new projects. This code should be used to mark documents that should not be included in built Views. By default, this code will be checked in the Does Not Contain section of the Tagging Filter.
	Review Job Browser	Review Job Browser window added to Tools menu. This window will list the Review jobs created for that project. Users can see if a job is done, in progress or in error. User will have the ability to see the progress bar and view errors of selected job.
	Splitters	Ability to use Number of Views Splitter to split Views based on BegBates_Prod or BegBates_Ing.
	Workflows	Duplicated Files option no longer copied over when using templates.
ND Similarity Viewer	Doc Viewer	Ability to highlight keyword hits.
	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags and fields displayed in the current layout.
	Miscellaneous	The ND Similarity Viewer button is now always enabled on the Dashboard. Upon opening, a Source Selector will display only those Views with the ND Build status set to Done. At any time, a user can access the Source Selector from the File menu to navigate to a different View.

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Email Thread Analyzer	Build ETA	Build operation stabilized when individual workflows error. Job will no longer be brought down by an individual workflow error during build phase 3, 4 or 5.
	Doc Viewer	Ability to highlight keyword hits.
	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags and fields displayed in the current layout.
	Miscellaneous	The Email Thread Analyzer button is now always enabled on the Dashboard. Upon opening, a Source Selector will display only those Views with the ETA Build status set to Done. At any time, a user can access the Source Selector from the File menu to navigate to a different View.
Concept Analyzer	Build CA	All Concept Analyzer enhancements require CA to be rebuilt per View. Upon upgrade, the Concept Tree and Map will be blank, until CA is rebuilt.
	Concept Field	'Concepts' field available as a Review field and Delivery field for X-Ref export.
	Concept Map	'Jellyfish' map replaced with a graphical treemap. - Treemap boxes sized according to number of documents in that concept. Concepts with more documents appear in larger boxes than those with fewer documents. - Slider bar at the top of the map allows users to zoom to a specific size threshold. - Unfiltered map will display parent concepts at the top of each box in white font. Child concepts will appear in grey font beneath the parent within the same box. - Double click on a parent concept box to display the associated child concepts. - Concept boxes are colored based on Production Tag assigned to the majority number of document in that concept. - Selected concept boxes will have a faint white border.
	Feature Removals	The following features have been removed. - Ability to merge concepts. - Date and Document Count filter. - Overview panel. - Tagging filter.
	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags displayed in the current layout.
	Miscellaneous	The Concept Analyzer button is now always enabled on the Dashboard. Upon opening, a Source Selector will display only those Views with the CA Build status set to Done. At any time, a user can access the Source Selector from the File menu to navigate to a different View.
	Options	New option 'Include Not Reviewed Documents in Map'. When OFF, Not Reviewed documents will not display in the Concept map.
Relationship Analyzer	Options	New option 'Filter Concepts by Form'. When ON, documents will be filtered according to the Production Tags existing in the selected Form.
	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags displayed in the current layout.
	Miscellaneous	The Relationship Analyzer button is now always enabled on the Dashboard. Upon opening, a Source Selector will display only those Views with the RA Build status set to Done. At any time, a user can access the Source Selector from the File menu to navigate to a different View.
	Miscellaneous	Build View and Review functions removed from Persons tab of Details View window.

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Assisted Review	Algorithm	Naïve Bayesian algorithm replaced with probabilistic latent semantic analysis (PLSA). This change improves document predictions as well as flattens out the probability breakdown for a more detailed assessment. As a result of this change, the Tokens panels for old Seed Sets will be empty. However, individual document probabilities will still be available.
	Assisted Review Workflow	Workflow simplified by breaking apart wizard into four distinct steps. Steps 2, 3, and 4 cannot be initiated until the preceding step has been completed. See 'Viewpoint 5.5 Assisted Review Manual' for additional information.
	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags available in the Assisted Review wizard.
	Miscellaneous	'Recommended' options renamed 'Default' options.
	Miscellaneous	Descriptions for selected advanced option in the Assisted Review wizard shown at the bottom of the window.
	Miscellaneous	'Seed Set' renamed 'Training Set'.
	Miscellaneous	'Token' panel removed as it is not compatible with PLSA algorithm.
	Miscellaneous	'Corpora' panel renamed 'Tokens'.
	Miscellaneous	Target View field moved above Training Set field.
	Miscellaneous	Ability to generate a random sample View of documents in grid. 'Sample Splitter - Number of Documents' available in the Actions menu.
	Options	The following advanced options have been removed. • Include Synonyms • Minimum # of Hits per Token • Number of Extreme Tokens to Consider • Token Weight
	Options	'Size of Sample View' option to enable users to change the default size of the Sample View.
	Options	'Calculate Document Probabilities on Workers' option to run the final calculation step on the workers. Algorithmic changes result in slower speeds however using this option will resolve that side effect.
	Performance Metrics	New 'Performance Metrics' panel added. See 'Viewpoint 5.5 Assisted Review Manual' for additional information.
	Probability Breakdown	New 'Probability Breakdown' panel. This graph is a breakdown of document counts per certain probability ranges.
	Production Statistics	Ability to right click and select 'Filter' on a specific segment of the bar charts in order to filter the Documents grid by Predicted and/or Production Tag.
	Sample View	Default size of Sample View increased to 2,000 documents.
	Seed View	The recommended Seed View size will only include random documents. Documents from ND, ETA and CA may be added in however this will enlarge the Seed View beyond the minimum recommended size.
	Seed View	User now has the ability to lessen or enlarge the size of the Seed View based on desired a desired margin of error or confidence level.
	Seed View	Zero documents from Sample View will be included in Seed View.
Delivery	Custom Fields	Custom Fields can now be positioned anywhere in an X-Ref file instead of only at the end.

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	Forms	New Forms menu added. User can switch between available Forms to adjust the Tags and Custom Fields available when using the Delivery options and configuring X-Ref templates.
	Miscellaneous	All elements of Production and Issue Codes removed.
	TIFF Options	'DocumentID' renamed 'BeginBates' in Multi Page Name Method field.
	X-Ref	The following fields can now be delivered as part of an X-Ref. • ND Group ID • ND Group Doc Count • ND Similarity • ETA Tree ID • ETA Cluster ID • ETA Doc Count • Concepts
Security	Miscellaneous	Company listing displays company name instead of company ID.
	Miscellaneous	'Automated Review User' permission visibility restricted to only 'Global'.
	Miscellaneous	'Project' visibility removed from 'Add Permission' permission.
	Miscellaneous	'Use selected user's layout as default' renamed 'Use selected user's profile as default'.
	New Permission	'Access Automation Levels' permission to restrict users from opening the Setup, Automation Levels window.
	New Permission	'Access Doc History' permission to restrict users from the Doc History window.
	New Permission	'Access Form' permission to restrict users to only certain Forms. Upon upgrade, a new security role will be created for each company. The Access Form permission will be added to this role and set to global visibility, and all current users associated with that company will be placed into it in addition to any of their existing roles. As a result, existing users will continue to have access to all fields and tags within their projects. As their needs change and you begin to create more limited Forms, users will need to be removed from this role, and their Access Form permission will need to be more actively managed.
	New Permission	'Access Mass Folders' permission to restrict users from opening the Setup, Mass Folders window.
	New Permission	'Access Notes' permission to restrict users from the Notes panel, Notes field and the ability to filter by Notes in the View Manager.
	New Permission	'Access Reports' permission to restrict users from accessing the Reports window.
	New Permission	'Access Tag Manager' permission to restrict users from opening the Tag Manager.
	New Permission	'Access Workflows' permission to restrict users from opening the Setup, Workflows window.

Bug Fixes

Reports	Miscellaneous	Error no longer occurring when Processing database does not have a corresponding Review database.
Processing	Connectors	Last account no longer collected multiple times when loading multiple Gmail accounts simultaneously.
	Metadata	Metadata from Emails with a period in the subject no longer misidentified.

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	Metadata	Issue with certain emails showing duplicate senders resolved.
	Miscellaneous	Able to delete a document contained in an ETA Tree.
	Miscellaneous	When creating Native PDFs from TIFFs Author field is now blank instead of 'Lateral Data LP'.
	Text	Text files for specific Japanese encoding no longer garbled.
	Workflows	Job titles now support Unicode characters.
Review	Automation	Now able to check out Views when Source Selector is not in layout.
	Fields	'Dedupe Custodian' field now populated in View(s) created from a Splitter.
	Miscellaneous	Able to save Redaction viewer renderings.
	Miscellaneous	Number pad enabled for keyboard shortcuts.
	Redaction	Pre-redaction highlights cannot be dragged past the borders of the TIFF page.
	Templates	Nested Workflow steps now copied over when using templates.
View Manager	Splitters	Email-Efile Splitter no longer errors when using more than thirty five Scopes as the source.
	Visual Index	Error no longer appearing when searching for two identical keywords with quotes.
Concept Analyzer	Layout	Layout changes in Concept Tree panel now saved.
Relationship Analyzer	Miscellaneous	Build no longer errors when View contains more than 2,100 Persons or Domains.
Assisted Review	Miscellaneous	Initial Training Set automatically available in the drop down menu.
Delivery	Miscellaneous	Checked Out Views hidden in Delivery View Selector.
	X-Ref	Now able to delivery secondary .LST file after initial delivery.