

# Kofax Insight

## Installation Guide

Version: 5.4.0

Date: 2016-08-30

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# Preface

This guide includes instructions for installing and upgrading Kofax Insight, and for activating the product license.

## Related documentation

In addition to this guide, the Kofax Insight documentation set includes the following:

### ***Kofax Insight Release Notes***

Contains late-breaking product information not included in this guide. You can download the release notes from the Kofax website at [www.kofax.com](http://www.kofax.com).

### ***Kofax Insight Administrator's Guide***

Describes the Admin Console functions and related information for the Insight administrator. This PDF guide is available from the Documentation folder in your Insight installation.

Default path: C:\Program Files\Kofax\Insight 5.4.0\Documentation

### **Kofax Insight Online Help**

Online help is available directly from the following Kofax Insight applications.

#### ***Help for Kofax Insight Studio***

Describes the functions in the Studio application, including the Dashboard Designer.

#### ***Help for Kofax Insight Data Loader***

Describes the functions in the Data Loader application.

#### ***Help for Kofax Insight Themes and Formats***

Describes the functions in the Themes and Formats application.

## Getting help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to [www.kofax.com/support](http://www.kofax.com/support).

The Kofax Support page provides:

- Product information and release news  
Click a product family, select a product, and select a version number.
- Downloadable product documentation  
Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases  
Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers)  
Click **Account Management** and log in.

To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools  
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products  
Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

## Chapter 1

# System requirements

Most software requirements for Kofax Insight are listed on the *Cross Product Compatibility Matrix* on the Kofax website at [www.kofax.com](http://www.kofax.com). The matrix is updated regularly, and we recommend that you review it carefully before installing your product. This chapter is intended to supplement the *Cross Product Compatibility Matrix* and to offer information about other requirements and prerequisites.

## Client hardware

All Insight clients (the Viewer for the user; Themes and Formats, Admin Console, Data Loader, and Studio for the designer) are entirely browser-based. They can run on any device or computer with a browser that supports HTML5. The minimum required screen resolution is 1024 x 768, although we recommend a higher screen resolution.

## Server hardware

The server should have a sufficient power and resource levels to support the anticipated load on the system. The following parameters must be met for the server.

**Processor.** The Kofax Insight server software runs on 64-bit based computers with a minimum of 2GHz clock speed. We highly recommend production servers with a minimum of a dual core configuration and 2GHz clock speed. For configurations combining both database and Insight servers, we recommend a minimum a dual quad core configuration.

**RAM.** The total required memory depends on the number of the individual source database records being processed in a single batch (all resources are assumed to be available to the Insight servers). For production servers, we recommend 16 GB RAM or higher for the Insight server and 24 GB RAM or higher for the database server.

**Note** If the Insight server is installed on the same server as the database server, these resource requirements must be considered in addition to the requirements defined by the database vendor for non-Insight operations. When shared server configurations are employed, the data compression capabilities of database servers (such as those in SQL Server Enterprise) must also be factored into the overall CPU load calculations.

## Client software

Computers and devices that run Insight clients require a web browser that supports HTML5, and they should be able to connect to the Insight server.

## Server software

See the Cross Product Compatibility Matrix on the Kofax website at [www.kofax.com](http://www.kofax.com) for information about requirements and supported versions for the following:

- Operating system
- .NET Framework
- HTML 5 Browser
- IIS Web Server
- Database management system

### Microsoft Packages

The **Microsoft Visual C++ 2010 SP1 Redistributable** package must be pre-installed on the server where you install Insight. If you plan to install Insight in a 3-tier environment, install the Microsoft package on the server that runs the (WCF) Data Services.

Also, on the server where Insight is installed, you are encouraged to install **Microsoft Access Database Engine 2010 Redistributable** to work with Excel files (.xls or .xlsx) as a data source, create records on files as data sources, or to load and use custom shapes for the Map component.

You can obtain the Microsoft Access Database Engine from the Microsoft web site and install it after Insight is set up.

### IIS web server

Internet Information Server (IIS) must be enabled and configured. While IIS is provided with all Windows servers, it is not installed by default; you must ensure that the installation is complete.

**Important** When you configure Insight on IIS, the application pool (default or custom) must be .NET v4.5 (Windows Server 2012) or .NET v4.0 (Windows Server 2008).

When using a custom application pool, you must have a dedicated application pool that contains the DataFileProcessorService with the LocalSystem identity. If you use an Active Directory account for an application pool, it must have the same level of permissions as the NetworkService and LocalSystem identities. Also, the application pools should have the Idle Timeout set to zero, so they always remain active.

### Configure IIS

If you use the default configuration for IIS, Internal Server Error messages may appear during the product installation process. You can prevent the errors by configuring IIS according to the steps provided here. Also, review the list of IIS settings to select. See [IIS 8 Settings](#) or [IIS 7 Settings](#), as applicable.

1. Using Control Panel, navigate to **Administrative Tools > Server Manager**.
2. In Server Manager, under **Features Summary**, click **Add Features**.

3. In the **Add Features** window, under **.NET Framework Features**, select the most current .NET Framework version.
4. In the **Add Features** window, under **.NET Framework <version> Features-WCF Activation**, select **HTTP Activation**.
5. Click **Next**.
6. In Server Manager, under **Roles Summary**, click **Web Server (IIS)**.
7. In the Web Server (IIS) management window, click **Add Role Services**.
8. In the **Add Role Services** window, expand **Web Server and Application Development**.
9. Select **ASP.NET** and click **Next** to start the installation.

## IIS 8 settings

Insight works with the default settings for IIS 8, as listed here. After you install Insight, some additional IIS 8 settings are added, and they are listed with an asterisk.

Common HTTP Features:

- Static Content
- Default Document
- Directory Browsing
- HTTP Errors

Security

- Request Filtering

Health and Diagnostics

- HTTP Logging

Performance

- Static Content Compression

Management Tools

- IIS Management Console

Application Development

- .NET Extensibility 4.5\*
- ASP.NET 4.5\*
- API Extensions\*
- API Filters\*

WCF Services

- HTTP Activation\*

## IIS 7 settings

When using Insight with IIS 7, select the settings listed here.



Common HTTP Features:

- Default Document
- HTTP Redirection
- Static Content

Application Development:

- .NET Extensibility
- ASP.NET
- ISAPI Extensions
- ISAPI Filters

Security

- Basic Authentication
- Client Certificate Mapping Authentication
- IIS Client Certificate Mapping Authentication
- URL Authorization
- Windows Authentication

Performance

- Static Content Compression
- Dynamic Content Compression

Management Tools

- IIS Management Console
- IIS Management Scripts and Tools
- Management Service

Under WCF Services for the .NET 4.5 Framework

- HTTP Activation (must be selected for Windows 8, Windows Server 2012, or later)

## Metadata repository

Kofax Insight stores its metadata and calculated data in either Oracle, Microsoft SQL Server, or MySQL databases. The server used for storage can be a separate server or a new database on any existing server for which you have specific database owner, or appropriate privileges. When installing the database, we strongly recommend using the database security administration option as opposed to Windows Authentication.

If you want to use a separate server, install it prior to installing Insight. For SQL Server databases, ensure that you install Microsoft SQL Server Studio or Studio Express for managing the database.

## Insight license

Although you can install Insight without a license, you cannot use Insight 5.4 until the license is activated. An Insight 4.x license does not work with Insight 5.x. Please contact the Insight support team if you need help to obtain an Insight 5.x license.

For instructions, see [Activate the product license](#).

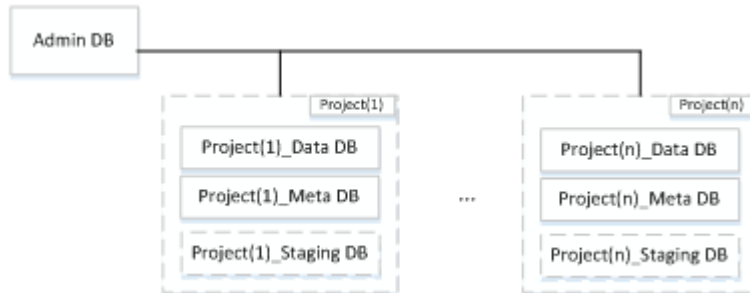
## Databases

The Insight server installed must be able to access the data to be analyzed. If the databases are accessed over a network connection, you must verify the necessary security/firewall settings and the availability of the drivers required for the target databases.

The Insight database structure consists of the following:

- [Admin database](#)
- [Project databases](#)

### Insight Database Structure



**Note** Staging DB is optional.

## Admin database

The Admin database stores administrative data related to the Insight environment and projects, including users, roles, filtering, alerts, logs, themes and formats. The Admin database also contains information related to projects, including the location of individual project databases (Data, Meta and Staging).

One Admin database exists per Insight server. You can use SQL Server, Oracle or MySQL for the Admin database.

The Admin database includes the following logic groups:

- INSIGHTUSERS
- ROLES
- PROJECTS

- MESSAGES
- ALERTS
- DOCUMENTS
- INSIGHTLOG
- SESSIONS
- SERVERS
- DATALOAD
- SETTINGS
- LOGINLOGS
- FILTERS
- DATE & CALENDARS
- THEMES & FORMATS

## Project databases

Each Insight project consists of the following databases:

- **Meta database:** Stores configuration information about the documents that make up a project. The project documents include data sources, records, metrics, translation tables, view (dashboard), reports, execution plans, file processor, processes, data load module, parameters, constants, accelerators and audit.

The Meta database includes the following logic groups:

- DOCUMENTS
- AUDITDATA

No data is stored in the Meta database.

- **Data database:** Stores the data related to processed records, metrics, and other project documents. A new table is created for each document, and the database schema is updated as documents are added, modified, or removed.
- **Staging database (optional):** Stores the data for external files parsed by the file processor. Examples include XML, CSV or Excel files.

## Database access rights

Insight requires the rights to create, drop and modify index, tables and stored procedures for the Admin, Meta, Data or staging databases.

### MS SQL Server

#### Database Connectors

No additional drivers or connectors are required for Insight to connect to SQL Server.

### Oracle

#### Database Connectors

Insight requires the Oracle Data Provider for .NET (ODP.NET), which is available in the Oracle Data Access Components (ODAC) for Windows Downloads pages on the Oracle web site. Be sure to select the ODP.NET option when you perform the Oracle database installation.

**Note** If you use "Xcopy," make sure that you complete all installation steps appropriately, including registering the libraries in .NET and the registry.

Recommendation: Install the ODP.NET 64-bit on a 64-bit Windows server.

### Access Rights to the Oracle Database

The user must have the following access rights:

- CREATE SESSION
- CREATE TABLE
- ALTER ANY TABLE
- DROP ANY TABLE
- CREATE PROCEDURE
- CREATE ANY INDEX
- ALTER ANY INDEX
- DROP ANY INDEX
- CREATE SEQUENCE
- DROP ANY SEQUENCE

The user must have an appropriate tablespace (also temporary tablespace) quota.

Example:

```
CREATE USER <USER NAME>
IDENTIFIED BY <PASSWORD>
DEFAULT TABLESPACE <TABLESPACE NAME>
QUOTA UNLIMITED ON <TABLESPACE NAME>
GRANT
CREATE SESSION
CREATE TABLE
ALTER ANY TABLE
DROP ANY TABLE
CREATE PROCEDURE
CREATE ANY INDEX
ALTER ANY INDEX
```

DROP ANY INDEX

CREATE SEQUENCE

DROP ANY SEQUENCE

TO <USER NAME>

## MySQL

Install the MySQL Connector/Net 6.8.3.0 and the ADO.NET driver for MySQL (Connector/NET). Both are available from the MySQL website.

## Other database types

Please obtain the ODBC driver from the database vendor or a third-party provider.

## Chapter 2

# Installation

This chapter includes instructions for installing Kofax Insight. Installation is a two-part process:

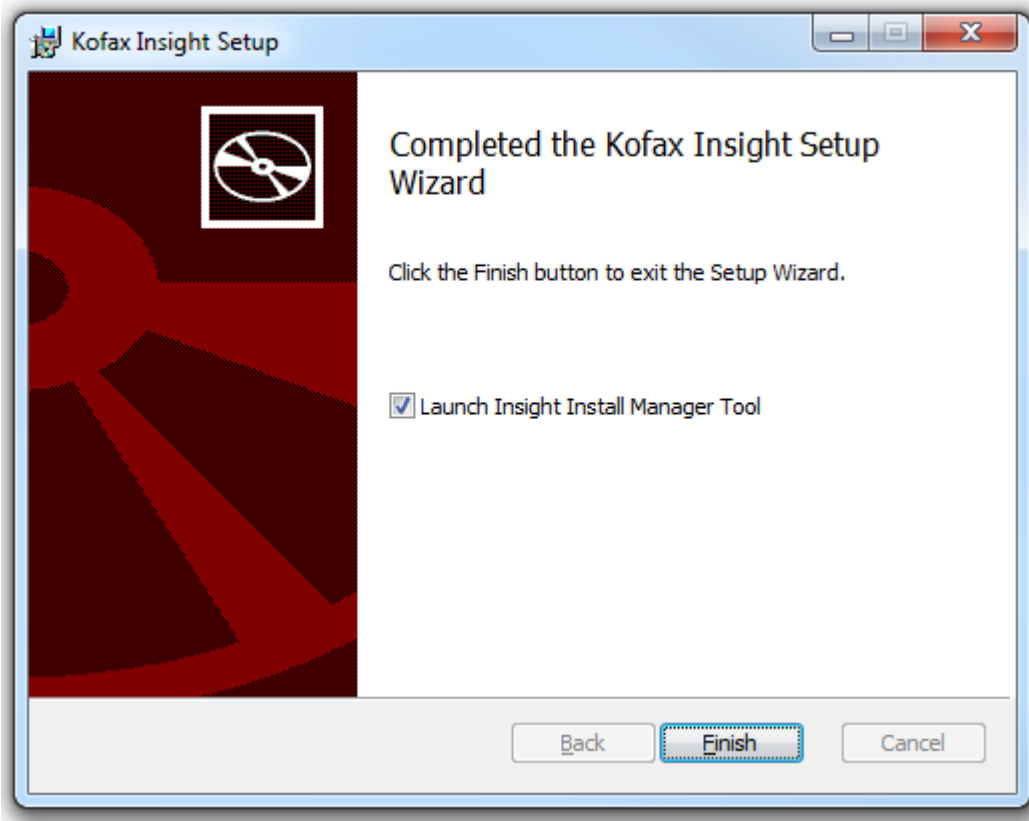
1. Run the [Insight installer](#) to copy the necessary files, including the documentation, to the server.
2. Run the [Insight Installation Manager](#) to create and configure the Insight database and Insight websites on IIS.

To install Insight using a Windows/Active Directory authenticated database account, see [Install Insight with Windows authentication](#).

Insight also includes a silent installer for performing an Insight installation without manual input. See [Run a silent installation](#).

## Install Kofax Insight

1. Download the Kofax Insight product files to the computer where you plan to install the product.
2. Extract one of the .zip files, such as **KofaxInsight-5.4.0\_64-bit.ZIP**, as applicable.
3. Run the applicable .msi file, such as **KofaxInsightSetup\_5.4.0.0.0.<NNNN>\_x64.msi**, where <NNNN> is the Insight build number listed in the "Version information" section of the *Kofax Insight 5.4.0 Release Notes*.  
The installation wizard appears.
4. Click **Next**.
5. If the installer detects that you are not the administrator, or that the installer is not being run as the administrator, a notification window appears. In this situation, click **Restart** to run as the administrator.
6. Review the license agreement, select the check box to accept the terms, and click **Next**.
7. On the Kofax Insight Setup screen, select **Full environment**, and click **Next**.  
If you are performing a custom installation, see [Set up Insight in a three-tier architecture](#) or [Install a map aggregate node](#), as applicable.
8. On the **Custom setup** screen, accept the default settings and click **Next**.  
An another option, click the **Browse** button to specify a different installation directory.
9. On the **Ready to install Kofax Insight screen**, click **Install** to begin the installation.
10. On the **Completed the Kofax Insight Setup Wizard** screen, click **Finish**.



The Insight Installation Manager appears. For instructions, continue to the next section, *Run the Insight Installation Manager*.

## Run the Insight Installation Manager

Use the Insight Installation Manager to create or configure the Insight database, SSL connection, and the Insight websites on IIS.

In most cases, the Insight Installation Manager is launched automatically after you run the Insight installer to copy files to the server. You can also launch the Insight Installation Manager from your Insight program folder.

When the Insight Installation Manager is launched, you are prompted to set up a database for Admin Console to store information.

1. If you plan to use an SSL connection for Insight, use IIS Manager to create a site that uses SSL before you continue with the Installation Manager. If you decide after the installation is finished to use an SSL connection, see the procedure in [Set SSL connection after installation](#).

**Important** We strongly recommend that you use an SSL connection. For information on how to set up SSL on IIS, see the Microsoft support website.

2. If you use an SQL Server database, use the following:

1. Connection Type: **MS SQL**
2. SQL Server Name: **localhost** or IP address, as applicable  
If you use MySQL or Oracle, ensure that you have the necessary database drivers installed prior to installing Insight.
3. Login and Password: Provide the login credentials for an account with system administrator rights.  
The user login does not need to be **sa**, but it needs system administrator rights to create the required Admin database automatically. If you cannot get an account with system administrator rights for the installation, create the Admin database ahead of time and create a user with ownership rights for the database.
4. Select **Create/Initialize Database** and assign a name for the Insight Admin database.



### Insight Engine Database Configuration

Connection Type:

SQL Server Name:

☐ Windows authentication

---

**Authentication**

Login:

Password:

---

**Databases**

☒ Create/Initialize Database ☐ Use Existing Database

Administration Database Name:

3. Click **Next**.  
The Insight Web Applications IIS Settings screen appears. The default settings work in most cases.
4. To use an SSL connection, select **Use SSL connection**. An SSL certificate on IIS is required.  
**TCP Port:** The default TCP/IP port when using SSL (HTTPS) is 443, and the default non-secure (HTTP) port is 80.  
**Web Site Name:** If you already created an IIS website, select it from the list. Otherwise, click **New** to create a new website.



# KOFAX



## Insight Installation Manager

Components Installation

### Insight Web Applications IIS Settings

TCP Port:  ☒ Use SSL connection

Application Pool ⬆

Application Pool Name:

Web Site Name:

You may create new application pool in IIS for Insight or use one of the existing pools.  
The selected pool must use .NET Framework 4.0 and have the Managed Pipe Mode as Integrated.  
Contact your system administrator if you are not sure about the properties of the existing pools.

### Insight Data Services Settings

☐ Enforce password policy

Administrator password

☐ Use remote Insight Data Service

Use this option if you would like to install the Data Services on a remote server.

Host:  TCP Port:  ☐ Use SSL connection

- The TCP Port 443 is not defined for web site Default Web Site

5. Enforce password policy: Select this check box to enforce the following requirements for the Administrator password:
    - Contains at least eight characters
    - Contains at least one alpha character (a-z; A-Z)
    - Contains at least one numeric character (0-9)
    - Contains at least one special character (Examples: @ & % \*)
  6. Specify the Administrator password, and then type it again.
  7. Ignore the "Use remote Insight Data Service" options, and click **Next**.
  8. You can review the setup details on the next screen. After reviewing, click **Next**. To make changes, click **Previous** to return to the previous screens.
- A list of installed components appears while the installation is in progress.

# KOFAX Insight Installation Manager

Components Installation

## Installing Components

- ✓ Creating the Administration Database
- ✓ Updating the Administration Database
- 🎯 **Updating the Config Files**
  - Preparing Internet Information Services (IIS)
  - Registering the WcfDataService Web Directory
  - Registering the Insight Web Directory
  - Registering the DataFileProcessorService Web Directory
  - Creating Shortcuts
  - Configuring Internet Information Services (IIS)

9. When notified that the Insight 5.4 installation is complete, select **Admin Console** and click **Next**.

### Installation Completed

The installation is finished successfully.

- ➡ Manage Settings
- ➡ Admin Console
- ➡ Setup Kofax Analytics Project
- ➡ Exit

- Use **Manage Settings** to update the Insight IIS settings or the Insight Admin database.
- Use **Admin Console** to activate the product license and configure the projects, users, roles and rights.
- **Setup Kofax Analytics Project** is not available in this version of Insight.
- Use **Exit** to clear the notification message and return to the desktop.

## Activate the product license

Verify that you have the Insight license file provided at the time of your product purchase, and then use the Admin Console to activate it.

1. Copy your product license file to a location that is accessible from your Insight installation.
2. In the **Insight 5.4.0** program folder, select **Administration > Admin Console**.
3. Enter the login credentials.
4. In the left pane of the Admin Console, select **License manager**.
5. In the right pane, click **Click here to add new data**.  
The "Add new license" dialog box appears.
6. On the **Add new license** dialog box, select **Add new license from file** and click **OK**.  
The **Choose File to Upload** dialog box appears.
7. On the **Choose File to Upload** dialog box, navigate to and select the license file, and click **Open**.  
The license is added to the License Manager list, and the Components section displays the components provided with the license.  
The Documents Tree is refreshed.

## Set SSL connection after installation

If you did not specify an SSL connection during the initial installation process, you can run the Installation Manager again to set the connection.

In this situation, you must ensure that SSL is installed on the site before you re-run the Installation Manager. Also, you must run the Installation Manager from a Command Prompt window as described here, instead of launching it from the Insight program folder. This approach gives you the ability to update all settings, including the IIS site and the port assignment.

1. Open a Command Prompt window.
2. Navigate to the folder where Insight is installed by typing:  
`cd C:\Program Files\Kofax\Insight 5.4.0`
3. From the installation folder, type the following:  
`cd Install Manager`
4. Run the following command:  
`Altosoft.Insight.InstallManager.exe /i`  
The Installation Manager is launched.
5. Follow the procedure to specify the SSL connection and update other settings, as described in [Run the Insight Installation Manager](#).

## Run a silent installation

As an alternative to the standard Insight installation process, you can achieve the same results by performing a silent installation from a Command Prompt window. During a silent installation, no manual entries are required.

1. Create a file named **InstallManagerSettings.xml** that will contain the configuration settings.
  1. Review the samples in [Silent installation sample configuration files](#).
  2. Base your file on the sample that corresponds to your database type (SQL Server, Oracle, or MySQL), and update the user name, password, and other values as applicable.

2. Save your configuration file and the applicable Insight installer (.msi file) in a separate directory, such as:

```
C:\Insight
```

3. Open a Command Prompt window and change to the directory where you saved the configuration and installer files:

```
CD C:\Insight
```

4. Run the following command:

```
msiexec /i KofaxInsightSetup_5.4.0.0.0.nnnn_x64.msi /q
```

where **nnnn** is the build number in the Insight installer file name

**Note** The `/q` runs the Insight installer in quiet mode (no user interface). The installer uses `InstallManagerSettings.xml` to obtain the configuration settings that are normally entered from the Installation Manager user interface.

## Silent installation sample configuration files

This section lists sample configuration files to use as a starting point for creating your own configuration file (`InstallManagerSettings.xml`) for the silent installation. Update the user name, password, and other values as applicable.

### MS SQL Server

```
<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings>
  <InstallDirectory>C:\Program Files\Kofax\Insight 5.4.0</InstallDirectory>
  <DBSettings UseExistingDB="False">
    <ConnectionType>MSSQL</ConnectionType>
    <AuthDBName>InsightDB</AuthDBName>
    <ServerName IsSQLAuthorisation="True">localhost</ServerName>
    <User>sa</User>
    <Password>sa</Password>
  </DBSettings>
  <WebDirContext UseSSL="False" CreateAppPool="True" CreateWebSite="False" Port="80">
    <ApplicationPoolName>Insight52</ApplicationPoolName>
    <WebSiteName>Default Web Site</WebSiteName>
  </WebDirContext>
</InstallSettings>
```

## MS SQL Server with Windows Authentication

```
<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings UseExistingDB="False">
  <Connections>
    <InstallDirectory>C:\Program Files\Kofax\Insight </InstallDirectory>
    <DBSettings nType=MSSQL</ConnectionType>
      <AuthDBName>InsightDB</AuthDBName>
      <ServerName IsSQLAuthorisation="False">localhost</ServerName>
    </DBSettings>
    <WebDirContext UseSSL="False" CreateAppPool="False" CreateWebSite="False" Port="80">
      <ApplicationPoolName>ASP.NET v4.0</ApplicationPoolName>
      <WebSiteName>Default Web Site</WebSiteName>
    </WebDirContext>
  </InstallSettings>
```

## Oracle

```
<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings>
  <InstallDirectory>C:\Program Files\Kofax\Insight 5.4.0</InstallDirectory>
  <DBSettings UseExistingDB="False">
    <ConnectionType>Oracle</ConnectionType>
    <AuthTNS>Insight_TNS</AuthTNS>
    <AuthUser>sa</AuthUser>
    <AuthPassword>sa</AuthPassword>
  </DBSettings>
  <WebDirContext UseSSL="False" CreateAppPool="False" CreateWebSite="False" Port="80">
    <ApplicationPoolName>ASP.NET v4.0</ApplicationPoolName>
    <WebSiteName>Default Web Site</WebSiteName></WebDirContext>
  </InstallSettings>
```

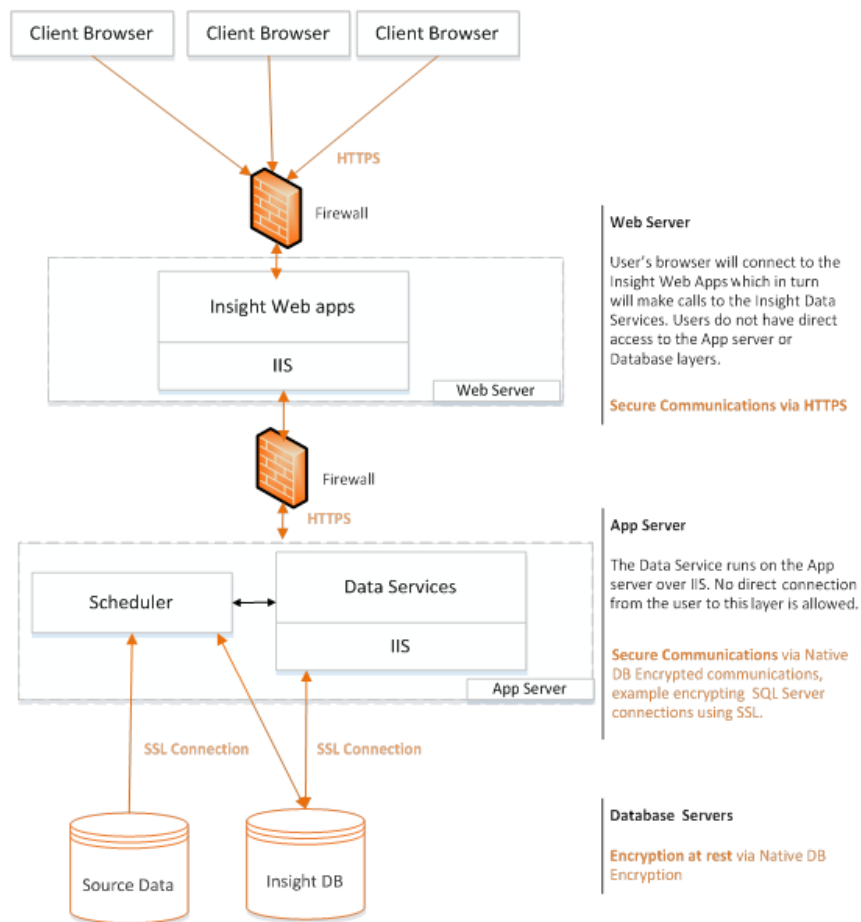
## MySQL Server

```
<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings>
  <InstallDirectory>C:\Program Files\Kofax\Insight 5.4.0</InstallDirectory>
  <DBSettings UseExistingDB="False">
    <ConnectionType>MySQL</ConnectionType>
    <AuthDBName>Insight_DB</AuthDBName>
    <ServerName>Insight_Server</ServerName>
    <User>sa</User>
    <Password>sa</Password>
  </DBSettings>
  <WebDirContext UseSSL="False" CreateAppPool="False" CreateWebSite="False" Port="80">
    <ApplicationPoolName>ASP.NET v4.0</ApplicationPoolName>
    <WebSiteName>Default Web Site</WebSiteName>
  </WebDirContext>
  </InstallSettings>
```

## Set up Insight in a three-tier architecture

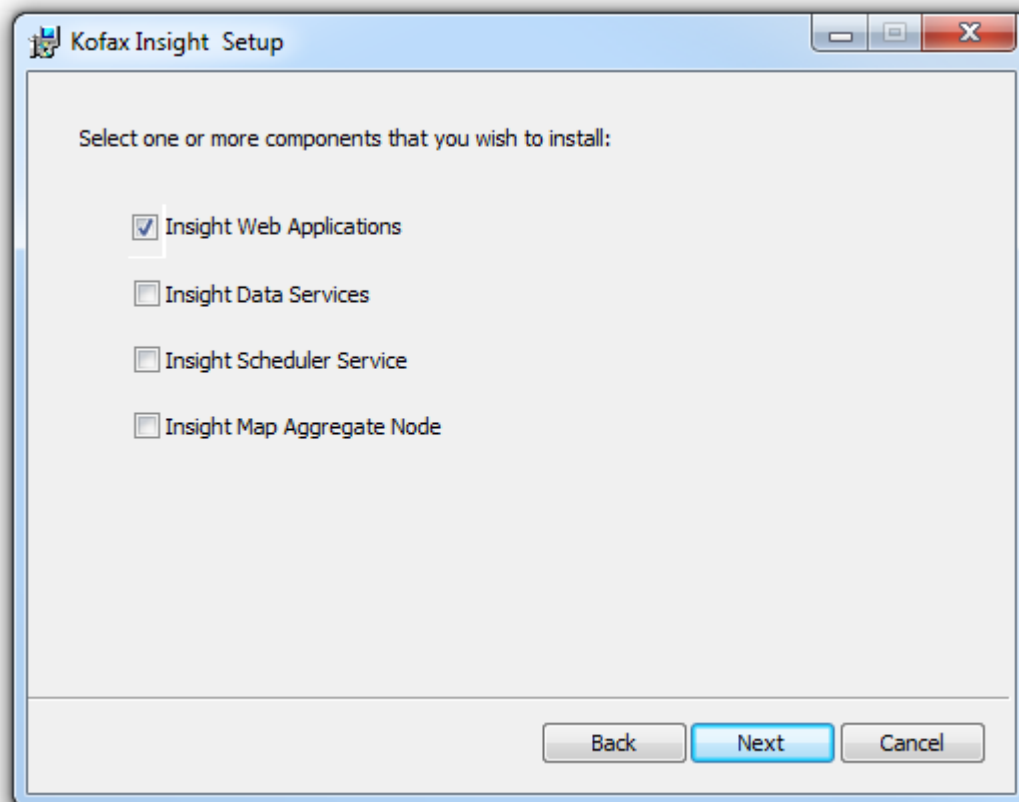
You can set up Insight in a three-tier architecture, where the Web Application is installed on the Web Server layer and the Insight Data Services and Insight Scheduler Services are installed on the App Server layer. This approach may be useful in a large-scale deployment (banking, financial, healthcare or other) that calls for balanced and secure distribution of the workload.

### Three-tier architecture



### Web server layer

1. Run the Insight installer on the web server, and follow the procedure in [Install Kofax Insight](#) with this exception: when you get to the Kofax Insight Setup screen, select **Custom**, and click **Next**. The component selection screen appears.



2. Select **Insight Web Applications**, and click **Next**.
3. Browse to the installation folder, and click **Next**.  
You are prompted to begin the installation.
4. Click **Install**.  
The installer copies the files to the selected folder and a completion message appears when the process is finished.
5. Click **Finish** to close the installer and launch the Insight Installation Manager.
6. Enter the necessary information about the IIS server on the Web Server layer.
7. Select the **Use remote Insight Data Service** check box, enter the Host and TCP port for the app server layer, and click **Next**.  
These settings are necessary to ensure that the web server is able to access the app server.

The screenshot shows the 'Insight Installation Manager' window. The title bar says 'Insight Installation Manager'. The main header features the 'KOFAX' logo and the text 'Insight Installation Manager Components Installation'. The window is divided into two main sections: 'Insight Web Applications IIS Settings' and 'Insight Data Services Settings'.

**Insight Web Applications IIS Settings**

TCP Port:  ☐ Use SSL connection

Application Pool ⌵

Application Pool Name:  ⌵

Web Site Name:

You may create new application pool in IIS for Insight or use one of the existing pools. The selected pool must use .NET Framework 4.0 and have the Managed Pipe Mode as Integrated. Contact your system administrator if you are not sure about the properties of the existing pools.

**Insight Data Services Settings**

☐ Enforce password policy

Administrator password

☒ Use remote Insight Data Service

Use this option if you would like to install the Data Services on a remote server.

Host:  TCP Port:  ☐ Use SSL connection

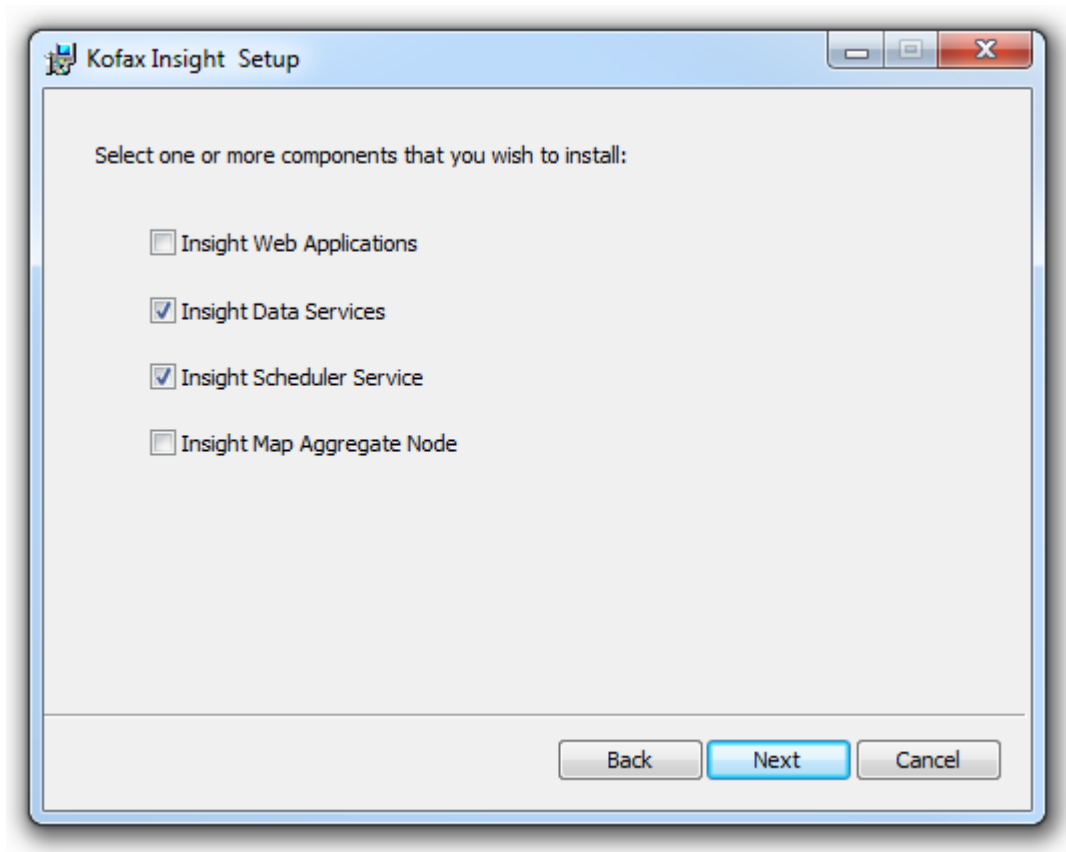
⬅ PREVIOUS NEXT ➡

8. Review and confirm the IIS settings, and click **Next**.  
The Insight Web Application components are installed.
9. When notified that the Insight 5.4 installation is complete, click **Next**, and then click **Exit**. Proceed to install the Data Service and Scheduler on the App Server.

## Application server layer

1. Run the Insight installer on the web server, and follow the procedure in [Install Kofax Insight](#) with this exception: when you get to the Kofax Insight Setup screen, select **Custom**, and click **Next**.  
The component selection screen appears.





2. Select **Insight Data Services** and **Insight Scheduler Service** and click **Next**.
3. Enter the Data Service Host, Port and enter the Insight Login information.

Kofax Insight 5.4.0.1403 Setup

The Scheduler Service will be connected to server:

Host: ru01vmalt06

Port: 8540 Use SSL: ☐

Login: Administrator

Password: ●●●●●●●●

Back Next Cancel

4. Select the folder where the installer should copy the files and click **Next**.
5. Click **Install**.  
The installer copies the files to the selected folder and a completion message appears when the process is finished.
6. Click **Finish** to close the installer and launch the Insight Installation Manager.
7. Enter the Database Connection information. If you are upgrading an existing Insight Admin database, select **Use Existing Database** and enter the database name. Otherwise, select **Create/Initialize Database** to create a new Insight Admin database.
8. Enter the IIS information for the Insight Web Applications and Insight Data Services, and click **Next**.

### Insight Web Applications IIS Settings

☐ Use SSL connection

ICP Port:

---

**Application Pool**

Application Pool Name:

Web Site Name:

You may create new application pool in IIS for Insight or use one of the existing pools. The selected pool must use .NET Framework 4.0 and have the Managed Pipe Mode as Integrated. Contact your system administrator if you are not sure about the properties of the existing pools.


### Insight Data Services Settings

☐ Use remote Insight Data Service

Use this option if you would like to install the Data Services on a remote server.

Host:  TCP Port:  ☐ Use SSL connection

 **PREVIOUS**

**NEXT** 

9. Review and confirm the IIS settings, and click **Next**.  
The Insight app server components are installed.
10. When notified that the Insight 5.4 installation is complete, click **Next**, and then click **Exit**.  
The three-tier installation is completed.

## Install a map aggregate node

With a map aggregate node, you can scale and increase performance by using the memory and CPU from additional servers (called nodes), while all calculations are performed in-memory. The data is preloaded into the memory for the other nodes, thus minimizing the need to access the database.

If you install a map aggregate node, we recommend that you select different servers from the ones that run the Insight Data Services, Scheduler or database, and that you install one node per server. You may install more than one map aggregate node. For details on the map aggregate configuration, see the *Kofax Insight Administrator's Guide*.

1. Run the Kofax Insight installer.
2. Read and accept the license agreement.
3. If the installer detects that another version of Insight is already installed, you are prompted to install a separate version of Insight. Select **Install Separately**.
4. Select **Custom**.
5. On the next screen, select only **Insight Map Aggregate Node**, and click **Next**.
6. Select the folder where the installer will copy the necessary files, and click **Next**.

7. Click **Install** to proceed with the installation.  
The map aggregate node is installed.

## Upgrade Insight

When upgrading to Insight 5.4.0 from an earlier version, do the following:

1. [Upgrade the Admin database](#)
2. [Upgrade existing Insight projects](#)

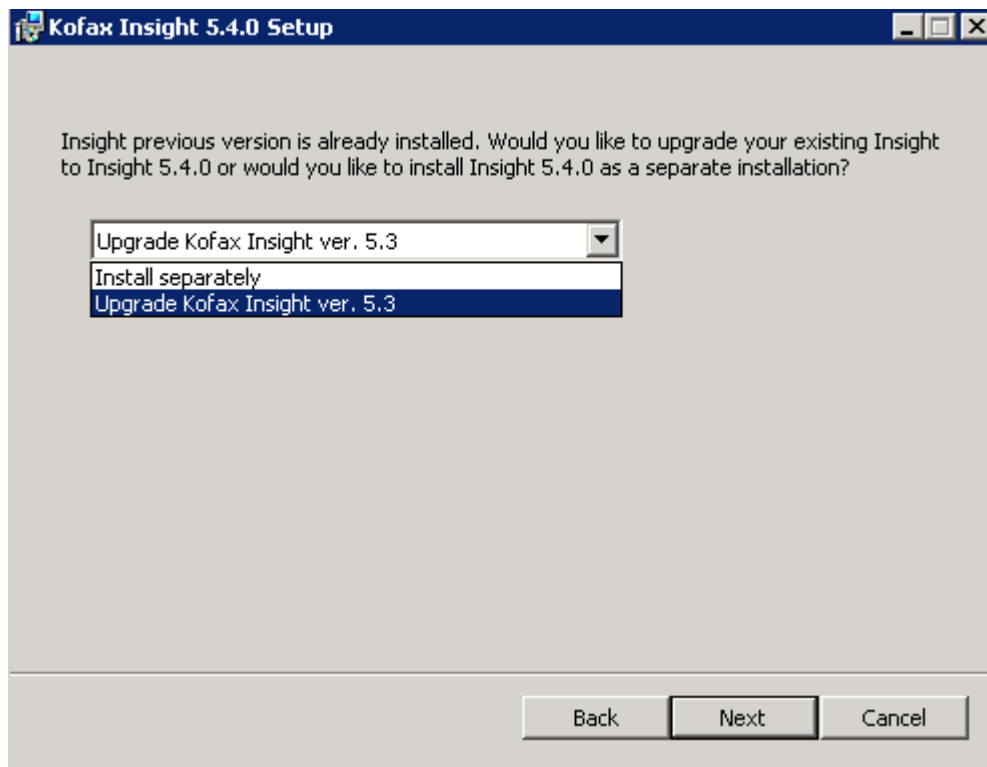
Before starting the upgrade process, we strongly recommend that you back up the Insight [Admin](#) and [project](#) databases.

**Important** If you are upgrading from version 4.3.1 or earlier, the upgrade must be performed in two phases. First, upgrade to Insight 5.x and then upgrade to Insight 5.4.0 (a direct upgrade from version 4.3.1 is not supported).

### Upgrade the Admin database

This section explains how to upgrade the Admin database.

1. Keep your existing Insight 5.x installation in place.
2. Run the installer for Insight 5.4, and follow the procedure described in [Install Kofax Insight](#).  
The installer sequence is the same with one exception: the following screen appears after you accept the license agreement.



3. Select **Upgrade Kofax Insight ver. 5.3**, and click **Next**.
4. Finish the installation and launch the Installation Manager.
5. Follow the procedure described in [Run the Insight Installation Manager](#), and make sure to do the following:
  1. Under **Insight Engine Database Configuration**, specify the connection and authentication information for the existing Insight Admin database.
  2. Under **Databases**, select **Use Existing Database** and specify the name of the existing Insight Admin database.
  3. Accept the default settings for the other Installation Manager screens, with this exception: Under **Insight Data Services Settings**, you must specify the Insight Administrator password (even if you plan to retain the same password from the previous version).
  4. Finish the installation.

The Admin database is upgraded to the format required for Insight 5.4. Once the upgrade is finished, your existing Insight projects are available in Admin Console and Studio. To upgrade your projects, see the next section.

## Upgrade existing projects


Use Admin Console to upgrade projects created in earlier versions of Insight. You can upgrade all existing projects at the same time, or upgrade them individually.

**Note** As another option, you can upgrade an existing project in Studio. When you select a project created in an earlier version of Insight, Studio automatically prompts you to convert the project for use in the current version.

1. Start **Admin Console**.
2. Navigate to **Documents Tree > Projects > <Your project name>**.
3. Verify that you can connect to the project databases by clicking **Connect**.  
If you cannot make the connection, **Change** to update the connection settings for the project databases and click **OK**.

Name:

Connection Option



Database type

MS SQL Server

Server Name

sql2008r2\sql2008r:

User Name

sa

Provider name


Sql server Provider

Database Name

Project54\_meta

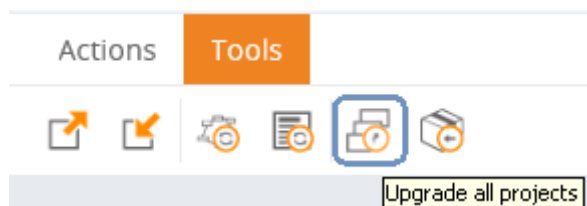
Password

••••••••



☐ Windows Authentication

4. On the **Tools** tab, on the toolbar, click **Upgrade all projects**.



The **Select projects to update** dialog box appears.

5. On the list, select the projects to update for use in the new Insight version. Select the check box at the top to select all projects, or select individual check boxes, and then click **OK**.

Select projects to update...



<input type="checkbox"/>	NAME ▲	VERSION
<input checked="" type="checkbox"/>	APA15	Get version
<input type="checkbox"/>	deleteme333	Get version
<input checked="" type="checkbox"/>	KAFC20	Get version

Your projects are upgraded.

6. Click **Close**.

## Install Insight 5.4 alongside previous version

You can install Insight 5.4 alongside an earlier version. This approach is useful if you decide to run both versions in parallel for a period of time before removing the earlier version.

Perform the Insight 5.4 installation according to the instructions in [Install Kofax Insight](#) and [Run the Insight Installation Manager](#), but with the exceptions noted in this section.

1. Before starting the installation:
  1. Use IIS Manager to create a new web site, which is available for selection when you run the Insight 5.4 Installation Manager. Select the new port.
  2. Use the current version of Insight to export your existing projects.
2. When you run the Insight 5.4 installer, select **Install separately** on the screen that appears after the license agreement.
3. When you run Installation Manager:
  1. On the **Insight Engine Database Configuration** screen, select the option to **Create/Initialize Database** and assign a name for a new Admin database.
  2. On the **Insight Web Applications IIS Settings** screen, select a unique port number.
  3. In the **Application Pool** section, select the name of the web site that you created in IIS Manager in the first step.
  4. Accept the default settings for the subsequent Installation Manager screens, and finish the installation.
4. Start the Insight 5.4 Admin Console, create a new project, and then import the projects that were exported from the earlier version of Insight.

## Appendix A

# Install Insight with Windows authentication

You have two scenarios for installing Insight using a Windows/Active Directory Authenticated database account:

1. The Windows/Active Directory account belongs to the *sysadmin* role with permissions to create new databases.
2. The Windows/Active Directory account does not belong to the *sysadmin* role.

In the second scenario, the Windows/Active Directory account is not a member of the *sysadmin* role, and thus does not have privileges to create new databases. The necessary Insight databases (Admin, Meta, Data, and optional Staging) must be created in advance by your DBA.

The Windows/Active Directory account must be given *db\_owner* permissions on all of these pre-created Insight databases. The Windows/Active Directory account must also have the ability to connect to and read from the master database. In a typical SQL Server environment, access to the master database is achieved by membership in the *public* role. However, if your DBA has modified the *public* role, the DBA needs to ensure that the Windows/Active Directory account has the necessary permissions to connect to and read from the master database.

In both of the preceding scenarios, the Windows/Active Directory account must also be a member of the Administrator group on the computer where you plan to install Insight. The Windows/Active Directory user must be logged into the computer with Administrator privileges for the duration of the installation.

1. Run the Insight installer on the server, and follow the procedure in [Install Kofax Insight](#).
2. When prompted that the installer is finished, do not click the **Finish** button.
3. Before proceeding, modify the Insight Scheduler Service 5.4.0 to run using the Windows/Active Directory account identity.
  1. In the Control Panel, select **Administrative Tools > Services**.
  2. Right-click **Insight Scheduler Service 5.4.0** and select **Properties**.
  3. Select the **Log On** tab and **This account**.
  4. Enter the Windows credentials and click **OK**.
  5. Restart the Scheduler service.
4. Return to the Kofax Insight installer screen, and click **Finish** to proceed to the Installation Manager.
5. You are prompted to enter information for creating and connecting to the Admin database for Insight Admin Console. Select the **Windows authentication** check box.
6. Complete the installation according to the procedure in the section [Run the Insight Installation Manager](#).
7. The IIS Application Pool that the WCFDataService resides in (ASP.NET v4.0 by default) must be changed to run with a Windows/Active Directory account identity.
  1. Open IIS Manager.



2. In the Connections pane, expand the server node and click **Application Pools**.
3. On the Application Pools page, select the Application Pool that contains the WCFDataService application.  
To view all the applications in an application pool, click **View Applications** in the Actions pane.
4. Once the Application Pool is selected, click **Advanced Settings** in the Actions pane.
5. Under Process Model, change the Identity to an account that has access to the Windows/Active Directory.
6. Restart the Application Pool after the change is made.



## Application Pools

This page lets you view and manage the list of application pools on the server. Application pools are associated with worker process isolation among different applications.

Filter: <input type="text"/> Go <input type="button" value="Show All"/> Group by: No Grouping					
Name	Status	.NET Fram...	Managed Pipeline Mode	Identity	Applications
ASP.NET v4.0	Started	v4.0	Integrated	ApplicationPoolIdentity	7
ASP.NET v4.0 Cl...	Started	v4.0	Classic	ApplicationPoolIdentity	7
Classic .NET Ap...	Started	v2.0	Classic	ApplicationPoolIdentity	0
DataFileProcess...	Started	v4.0	Classic	LocalSystem	1
DefaultAppPool	Started	v2.0	Integrated	ApplicationPoolIdentity	1

8. Insight setup is now complete. Follow the steps in the "Windows Authentication" section of the *Kofax Insight Administrator's Guide* to set up your Insight projects using Windows Authentication.

## Appendix B

# Insight log files

This section gives you an overview of the information that is available in the Insight log files, which are located here:

C:\Temp\Insight\_5.x.0 where 5.x.0 is the version number.

**Note** All 5.4.x versions use 5.4.0.

Access to C:\Temp is required for logging.

### **AlertDistribution**

Information related to the Alert generation/distribution feature.

### **Altosoft.Insight.InstallManager**

Information on Insight software installation and other activities related to the Insight Installation Manager.

### **BridgeService**

Information related to the Insight Bridge Service, which is used to communicate with 32-bit data sources on 64-bit operating systems. This might be used with Excel or a 32-bit ODBC driver on a 64-bit computer.

### **DataFileProcessor**

Information related to the Data File Processor (file parsing) functionality.

### **DataLoad**

Information related to the Data Loader web application.

### **DataProcessing**

Information related to dashboard queries (to the Data database/MetricsMart) to get data for dashboard display at runtime (View application) and design time (Studio application).

### **DocumentsConverter**

Information related to updating of Insight database versions.

### **ImportExport**

Information related to import and export activity of the standalone Import/Export tool.

### **InsightAdmin**

Information related to the Admin Console web application.

### **InsightInstallation**

Information related to the main MSI installer for Insight software.

### **InsightServer\_WinApp**

Information and execution details for data loading (execution plans).

### **InsightStudio**

Information related to Studio web application.

### **InsightThemes**

Information related to the Themes and Formats web application.

### **InsightViewer**

Information related to the Viewer web application.

### **NodeService (External)**

Additional information related to the Insight Node Service (for the Map-Aggregate feature): SQL query execution, Studio document activity, and project version activity.

### **NodeService**

Information related to the Insight Node Service (for the Map-Aggregate feature).

### **ProcessManager**

Information related to data loading of processes.

### **ReportDistribution**

Information related to the scheduled report generation/distribution feature.

### **Scheduler**

Information on the Insight Scheduler Service, which is used to update and launch scheduled tasks (as defined in execution plans).

### **UpdateTable**

Information related to database and table schema changes, typically due to Studio project development and Import/Export activity.

### **WcfDataService**

Information related to the WcfDataService web service. Includes database (Admin, Meta, and Data) queries for all Insight web applications; and user authentication and login activity for all the web applications.

To change the log file location, modify the following configuration files by changing the path `C:\Temp\Insight 5.X.0` to the required folder.

For example, to change the file directory to D:\Logs\Insight 5.4.0, open **Server\AltoSoft.Insight.DashboardServer.exe.config** and change `<file value="C:\Temp\Insight_5.4.0\ProcessManager.log"` to `<file value="D:\Logs\Insight_5.4.0\ProcessManager.log"`. Use the same procedure for any configuration file on the list.

- Server\AltoSoft.Insight.DashboardServer.exe.config
- SchedulerServer\AltoSoft.Insight.Scheduler.exe.config
- SchedulerServer\App.config
- NodeService\NodeService.exe.config
- InsightBridgeService\AltoSoft.Insight.BridgeService.exe.config
- InstallManager\logging.config
- DataFileProcessorService\bin\AltoSoft.Insight.DataFileProcessor.Service.dll.config
- WcfDatasevice\Web.config
- InstallManager\AltoSoft.Insight.InstallManager.exe.config
- HtmlInsight\Themes\Web.config
- HtmlInsight\reporthtml\Web.config
- HtmlInsight\DataLoad\Web.config
- HtmlInsight\View\Web.config
- HtmlInsight\Studio\Web.config
- HtmlInsight\Admin\Web.config
- DataFileProcessorService\Web.config
- ImportExport\Web.config