

Kofax Insight

Release Notes

Version: 5.5.0

Date: 2017-03-13



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Chapter 1

About this release

The release notes contain late-breaking information about Kofax Insight 5.5.0. Please read this document carefully, as it contains information that is not available in other Insight documentation.

Version information

This product is identified by build number 5.5.0.1876, as listed in the About window, which you can access from the Info panel in any Insight application (Admin Console, Studio, Themes and Formats, or Data Loader). For the Viewer, this option is available in the context menu.

System requirements

The primary source of information about Insight requirements and dependencies on other products is the *Technical Specifications*, which is available on the Kofax website at www.kofax.com. The document is updated regularly, and we recommend that you review it carefully to ensure success with your Insight product.

Note Be sure to review the "Microsoft packages" section in the "System requirements" chapter of the *Kofax Insight Installation Guide* for essential information about the following packages:

- Microsoft Visual C++ 2010 SP1 Redistributable
- Microsoft Access Database Engine 2010 Redistributable

New features

This section describes the new features introduced in Kofax Insight 5.5.0.

Insight analytics

Enhanced web service support for actionable analytics

When you make an API call from the Viewer (by clicking an actionable component), Insight handles both success and failure responses.

Business intelligence

For details about the following features, see the Insight Studio online help.

SAP BW (Business Warehouse) enhancements

SSO authentication is added for utilizing SAP BW services. Also, you can select the dimension representation for OLAP metrics.

Access Studio from the Viewer

You can allow the dashboard user to access Studio directly from the Viewer by using a context option. In this case the Studio application opens in a separate browser window.

Enhancements in the map component

Using the improved map wizard and new properties, you can:

- Group pins as bubbles or images to avoid cluttering them.
- Add charts as pins.

Export chart as an image

You can copy the chart as an image to your clipboard and paste it in any desired location.

Process intelligence and behavior-based analytics

For details about the following features, see the Insight Studio and Viewer online help systems.

Generating multiple steps in a process

You can generate multiple steps in a process simultaneously when they are based on the same record and use the same definition and field mapping.

Enhancements in a process filter definition

Using process filter definitions, you can:

- Add AND, OR, or NOT conditions to the process filter definition to combine a set of paths.
- Add "patterns" to the process filter definition, when you can define any number of steps before a certain step or any number of steps after the certain step.
- You can define a process filter definition using other process filter definitions and swimlane groups.

Dimensional breakdown

You can configure your process chart to break down a dimension in a way that when you hover over the transition or click it, a chart appears immediately over with the data broken down respectively.

Display Others in categorized charts

You can create the "Others" group in the Viewer to display it as a separate bar.

Coloring transitions on swimlanes based on timing

You can configure timing conditions for coloring transitions. For example, use the green color for fast transitions and the red color for slow transitions.

Logs and Data root directories

During installation you can provide the path for the log files and for the data files that you download via Insight.

Enhanced user interface and documentation

Enhancements throughout the user interface, including the wizard screens, info panel, and online context-sensitive help, offer an improved user experience.

Online help is available directly from the Admin Console, Studio, Themes and Formats, Data Loader, or Viewer applications. Information about Insight installation is described in the *Kofax Insight Installation Guide*, which is available from the `Documentation` folder.

Change password

The user may change the password by using this option throughout all the Insight applications.

Changes in behavior

This section describes product behavior that has changed since the previous version of Kofax Insight.

Access rights for uploading and selecting files

By default, only the Administrator user can load and select files after you upgrade to Insight 5.5. You can give permissions for working with files to any user within their roles in Admin Console. See the *Kofax Insight Admin Console Help*.

City shape layer dropped in maps

To show cities on the map, you can add an additional pin layer. For example, add a pin layer based on the record with city fields and assign a translation table with coordinates, select the "Image" type and upload an image for the label. Also, select "Show reduced tooltip as label" for this layer.

City layer by ZIP code and country

You can create a translation table for ZIP codes based on the `GEODATA_ZIPCODES` table and assign it to the *PostalCode* record field or metric dimension. If you have the same codes for different countries or

states, you can create a combined field, for example, "Country:ZIPCode" and use it as a translation table ID field or as a record field or metric dimension.

Info panel

The following options have been transferred from the toolbar to the info panel: About and Log out.

Chapter 2

Resolved issues

This chapter lists previously reported issues that are resolved when you install Kofax Insight 5.5.0.

Document descriptions not imported via the Studio import tool

If you entered a description text for records or metrics, it was not imported if you used the Studio import tool. (862258)

Process loading slow

Loading a process took too much time. (838226)

Insight configuration settings rewritten after removing the fix pack

If you removed Insight 5.4.0.<build number> fix pack and opened the Scheduler, Server, and Installation Manager configurations settings, they were reset to default. (837726)

Enforce Password Policy setting not applied

If you disabled the Enforce Password Policy setting for the user, it still applied during the password change procedure. (833331)

An error during loading big processes

For big processes with more than a thousand steps, during a data load the `FullPath` column in the database could not fit the string and the SQL server returned an error. (800231)

Selected menu item not highlighted

If you selected a menu item in the third level of the menu, it was not highlighted. (798512)

Duplicate date aggregations

For the extended chart, duplicate time aggregations appeared if you used a grouped bar and a trendline with external intervals. (773666)

User able to export data without an Administrator password

You could export a project with data without providing the Administrator password. (733318)

Missing descriptions for charts in the Studio Help

General descriptions of charts were missing in the Insight Studio Help. (765308)

Default Administrator user could be deleted

You could delete all users that belonged to the Administrator role even including the default Administrator user. (763932)

Drilling down not working correctly

The record grid displayed different results for drilling down when it was refreshed only and drilled down with refreshing. (763287)

Incorrect data import

If you selected a specific content for import, extra tables (not selected for the import) were shown during data import as if they were being imported. (755088)

Error in URL validation

The URL validation mechanism blocked valid URLs that contained special characters like spaces, {, { and more as well as all standard URL escape sequences like X%. (748762)

Data load status not updated correctly

Data load status remained "Started" even after the query time out had already expired. (746339)

Data load task failure

Data load task failed because of the expired session at the moment of the data load. (744494)

Incorrect export of filters

When you exported a grid to Excel, all used filters (even fake invisible filters) were exported. (740269)

Query with double aggregation generated

A query with the double aggregation was generated for on-demand metrics when the derived fields and dimensions did not match. (740260)

Wrong validation for templates with URLs

URL validation did not work correctly if you added a template to the field with the URL. URLs with the \ symbol were not accepted even if you changed them to / afterwards.(738292)

Missing Property Panel descriptions

Several descriptions for the Property Panel options were missing. (738161)

Chapter 3

Known issues

This chapter describes issues that you may encounter while using Kofax Insight. Workarounds are provided, as applicable.

Error in displaying patterns for the process filter definitions

If you already have a process filter definition with a pattern, this pattern is shown as selected when you create a new process filter definition even though it should not have any patterns at the time of creation. (874951)

Grid filter not applied

Grid filter is not applied to the absent field value. (874577)

Error in the Open URL action

If your locale is set to RU, the "Open URL" action does not properly work. (837763)

Failure in drilling down for grids

Drilling down in grids does not work for Internet Explorer 11. (769150)

Failure in exporting a chart to image for touch devices

If you try to export a chart to image via the context menu in the Viewer for a touch device, a blank page appears. (765505)

Incorrect import of the Others row

If you import a grid with the "Others" row, it is placed in the middle of the table, not under the "Total" row. (722157)

The Start from zero check box applies to horizontal charts

If you enable the "Start from zero" option in the Property Panel for the Y-axis, it applies to horizontal charts. (694578)

Named colors not applied

If you change localization, named colors are not applied. (685758)

Incorrect display of totals

If the trellis chart is configured to show totals, all inner charts show the same total. (682804)

Incorrect filtering by a scatter chart

The scatter chart does not work as a filter by the field if it is not used for the breakdown. (669333)