

# Kofax Insight

## Release Notes

Version: 6.3.0

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**KOFAX**

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## Chapter 1

# About this release

The release notes contain late-breaking information about Kofax Insight 6.3.0. 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 6.3.0.0.0.1336, as listed in the About window, which you can access from the Info panel in any Insight application (Admin Console, Multi-Tenant Console, Studio, Themes and Formats, or Data Loader). For the Viewer, this option is available in the context menu.

## System requirements

For information on supported operating systems and other system requirements, see the *Kofax Insight 6.3.0 Technical Specifications* document on the [Kofax Insight Product Documentation site](#). The document is updated regularly, and we recommend that you review it carefully to ensure success with your Insight product.

## Product documentation

The Kofax Insight product documentation set consists of the *Kofax Insight Installation Guide*, help systems, and other documents to assist you with installing, configuring, and using the product.

### Online documentation

The product documentation for Kofax Insight 6.3.0 is hosted online<sup>1</sup>:

<https://docshield.kofax.com/Portal/Products/Insight/6.3.0-48om56k3fr/Insight.htm>

Once you install Kofax Insight, the help system is launched automatically when you click the Help icon within any Insight application.

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<sup>1</sup> You must be connected to the Internet to access the full documentation set online. For access without an Internet connection, see "Offline documentation."

## Offline documentation

To make the documentation available for use in offline mode (without an active Internet connection), obtain the documentation.zip file from the product package that you downloaded from the [Kofax Fulfillment Site](#). The product package includes the following documentation files for offline use:

- KofaxInsightDocumentation\_6.3.0\_EN.zip  
Contains the entire product documentation set in English.
- KofaxInsightDocumentation\_6.3.0\_JA.zip  
Contains the entire product documentation set in Japanese.

For each language, the .zip files include the following folders:

- The **print** folder contains the Kofax Insight Installation Guide and Kofax Insight Administrator's Guide for Azure.
  - The **help** folder contains Help for Kofax Insight Admin Console, Help for Kofax Insight Studio, Help for Kofax Insight Data Loader, Help for Kofax Insight Multi-Tenant Console, Help for Kofax Insight Viewer, Help for Kofax Insight Themes and Formats, API Online Help, and Tutorial and Sample Project Help.
1. Obtain the compressed documentation package for the required language from the Kofax Insight 6.3.0 product package that you downloaded from the Downloads page on the Kofax Fulfillment Site.
  2. Create the **Documentation** folder to extract the contents of the documentation .zip file to the following location:  
`[drive:]\\Program Files\\Kofax\\Insight 6.3.0\\HtmlInsight\\Documentation`
  3. Start any Insight application and click the Help icon to open the help in a separate browser window.

To use the PDF documentation offline, you can open it from the Documentation folder or from another location on your computer. When the offline documentation is installed for Kofax Insight according to these instructions, the product will use the offline version of the documentation by default, even if an active Internet connection exists.

**Note** The Documentation folder is not removed automatically in case the product is uninstalled, and you need to delete it manually.

## New features

This section describes the new features introduced in Kofax Insight 6.3.0.

### New All/Clear option for item selection

You can use the **Switch to invert selection** option to optimize the request handling and add all items to the request, beside the ones already loaded on the list. This option enables the inverse of current

selection after you click **All/Clear** to select all items: All unselected items are added to the request with the inverse condition. After you clear the list by clicking **All/Clear**, the default behavior is used.

- The **Switch to invert selection** option functions when the positive filter is on, the **Is negative** is not selected. The **Switch to invert selection** option functions when the positive filter is on, the **Is negative** is not selected. If the **Switch to invert selection** option is not selected, only currently loaded items are selected after you click **All/Clear** to select all items. Clear the **Switch to invert selection** check box if you need to explicitly add the selected items to the request.
- If the **Invert selection by default** option is active, the selection is inverted by default.

## New selection options for grids

In Insight 6.3.0, in the **Multiple selection** mode, after you configure the filter for a grid, two new options appear on the context menu: **Select first N** to select a number of rows, and **Clear select** to clear the selection.

## Ability to store sessions in Database

With this release, the **Store sessions in Database** option is available in **Admin Console > Documents tree > Options > Other options**. This feature allows to store the session in the database, and keeps you in the system if the service was restarted. If the option is not selected, after service is restarted, you will be logged out.

In **High availability** mode, the **Store sessions in Database** setting is selected by default and cannot be cleared.

## Oracle RDBMS 19c supported

Insight 6.3.0 supports Oracle RDBMS 19c.

## Ability to apply auto layout to process chart

If a process chart contains a lot of steps and transitions, it may be challenging to create a neat layout. Use the **Apply auto layout** option to define the process chart appearance: **None**, **Horizontal**, **Vertical**.

If the **Horizontal** or **Vertical** value is selected, the new process chart is rendered with the required orientation: The process step size remains the same, and the transition is displayed as polyline.

Additional layout options are available in the Property Panel. For details, see *Kofax Help for Insight Studio*.

## Localization to Japanese

Insight 6.3.0 supports the user interface in English and Japanese, and the display language is based on the locale of the user's browser. All Insight components, including Installer, Installation Manager, and Sample project, are available in both English and Japanese. Also, the Insight documentation is delivered in English and Japanese.

## User filters for on-demand record and metric requests

The **User filters** option is introduced in the Expression editor for on-demand records and metrics. You can add user filters in the same way as other parameters. Also, this option is available for use in custom requests with the following template: <UserFilter::FilterName>.

If the **User filters** option contains multiple values, they are separated by commas. If the **User filters** option does not contain any values, the value is replaced with **NULL** and added to the SQL query. Use the **Is filter empty** option to check if the required user filter contains any values.

## Active Directory authentication supported

In Insight 6.3.0, Active Directory authentication is available for all Insight components, including Installation Manager, Scheduler service, Import and Export utilities.

For Installation Manager and Import and Export utilities, the user mapping for the Admin application is used. For Scheduler, the user mapping for the Data Loader application is used.

Only users with the administrator role can log in to Installation Manager, Scheduler service, and the Import and Export applications.

To enable Active Directory authentication, select **Enable Windows authentication for Data Service** in Installation Manager.

The LDAP path is now defined in the WCF data service web.config. To use LDAPS, define the LDAP path in the following way: `LDAP://ldap.domain.com:636`

If a self-signed certificate is used, obtain the root certificate and install it as a Trusted Root Certificate. The fully-qualified domain name that you use to connect to Active Directory must match the SSL certificate exactly.

## Dashboard filter for on-demand record and metric requests

The **Dashboard filter** option is introduced in the **Expression editor** for on-demand records and metrics. You can add dashboard filters in the same way as other parameters. Also, this option is available for use in custom requests with the following template: <DashboardFilter::FilterName>.

If the **Dashboard filter** option contains multiple values, they are separated by commas. If the **Dashboard filter** option does not contain any values, the value is replaced with **NULL** and added to the SQL query. Use the **Is filter empty** option to check if the required dashboard filter contains any values.

## Ability to generate process without having to specifying any steps and scheme

With this release, Insight allows to generate a process without defining any steps and without a certain scheme. For details, see *Kofax Help for Insight Studio*.

## Changes in behavior

This section describes product behavior that is changed in Kofax Insight 6.3.0.

### Support process reload for any interval

Insight 6.3.0 allows to reload a process for any interval. The option is supported only for simple processes with the same process key for all steps: Mapping from the right to the left should be the same for all steps.

It is possible to create new process instances starting from any step. If the first step for any instance is not marked as **Is start**, Insight creates the new process instance anyway.

The option is supported only for a single record and only when the same mapping is set in for all steps in a Fixed process. Processes with different records are deprecated and will be removed in the next releases. If you require to use a different record, consider creating a new record for process, add the required records to it, and use the new record for process. Also, the processes with different mapping are deprecated.

### New NLog library used

Insight 6.3.0 uses the NLog library to log the events. By default, Insight log adds the events in files. See the full file list in the "Insight log files" section of *Kofax Insight Installation Guide*.

To change the log level, open the web.config file, and add one of the following values for the LogLevel variable as applicable: Level, Fatal, Error, Warn, Info, Debug, Trace, and Off.

For details on additional log configuration changes, refer to the NLog website.

### Import-Export utility divided into two applications

The Import-Export utility is divided into two applications: Import and Export. The unified Import-Export utility is deprecated and will be removed in a next release.

### Changes in data load logic

The data load logic used in Insight 6.1.0 and higher is presented as follows:

- New data is loaded to the Temporary table. The Temporary table is real table in the Data database with a unique generated name for each data load.
- Existing data is removed from the Main table.
- New data is copied from the Temporary table to the Main table.

If the data load fails on step 1 or 2, the data is kept in the database. If the data load fails on step 3, the data becomes unavailable as the existing data is removed and the new data is not copied.

In Insight 6.3.0, the data load process has been revised to offer a better performance.

- If no data is available in the Main table, the new data is loaded directly to the Main table.

- If the data load is performed for the full interval (years 1900 - 3000), the existing data is removed from the Main table and the new data is added directly to the Main table.
- If the record contains a time field, and the user loads data from year 1900 to a date that is earlier than <ToDate>, the system assumes that the reload is performed, clears the Main table, and copies the data directly to the Main table.

To use the former data load logic, you can select the **Data load legacy mode** option. In this case, the data load functions as in version 6.2.1, and the accelerators, join in memory, and additional join conditions are not used.

We recommend that you use this option with caution because it is provided only as a temporary solution. The **Data load legacy mode** option will be removed in a next release, and only the new data load logic will remain.

## Context menu items customized

In Insight Studio 6.3.0, the context menu has been revised.

Property	Changes
<b>Reset</b> - Renamed to <b>Reset to default</b>	Always displayed.
<b>Pivot</b>	Can be hidden.
<b>Create marker</b>	Displayed only if <b>Show marker</b> is selected and <b>Can create marker</b> is selected for the user in the <b>Roles</b> section.
<b>Show markers</b>	Removed from the context menu. Available in the <b>Property Panel</b> .
<b>Show labels</b>	Removed from the context menu. Available in the <b>Property Panel</b> .
<b>Remove point</b>	Removed from the context menu.
<b>Remove series</b>	Removed from the context menu.
<b>Zoom in</b>	Always displayed.
<b>Time</b>	Removed from the context menu.
<b>Metric grid</b>	Clear <b>Show grid</b> in the <b>Property Panel</b> to hide this item.
<b>Sort by</b>	Clear <b>Display sort</b> in the <b>Property Panel</b> to hide this item.
<b>Chart type</b>	Clear <b>Show chart</b> in the <b>Property Panel</b> to hide this item.
<b>Logging</b>	Displayed only in the Debug mode: When the "debug=true" parameter is set in URL or the DEBUG parameter is set to true on the server (WcfDataService web.config).
<b>Info</b>	Displayed if <b>Show context help</b> is selected.
<b>Export to excel</b>	Hidden if the <b>Hide Export Button</b> parameter value is set to True.
<b>Export to image</b>	Always displayed.

Property	Changes
<b>View</b>	Removed from the context menu. Project and View name are moved to the <b>Info</b> dialog box.
<b>Toggle test session</b>	Available if user has the right to toggle and create a new test session.
<b>Copy</b>	Always displayed.
<b>Refresh - Renamed to Reload data</b>	Removed from the context menu.
<b>Change password</b>	Available for Insight authentication if a user has the right to change a password.
<b>Logout</b>	Always displayed.
<b>About</b>	Always displayed.
<b>Help</b>	Always displayed.
<b>Language</b>	Displayed only if the project supports multiple languages.
<b>Theme</b>	Displayed only if several themes are available.
<b>Bookmarks</b>	Displayed only in debug mode. In other cases, a user selects the actions from the menu if they are available.
<b>Print</b>	Displayed only in debug mode. In other cases, a user selects the actions from the menu if they are available.
<b>Actions</b>	Displayed only if several actions are available.
<b>Process configuration</b>	Clear <b>Display Process configuration</b> in the <b>Property Panel</b> to hide this item.
<b>Scale</b>	Always displayed.
<b>Grouping</b>	Always displayed for the swimlane charts. The <b>Allow grouping</b> option and the <b>Swimlane groups</b> tab are added and displayed only for the swimlane charts.
<b>Process filter</b>	Clear <b>Display filter options</b> in the <b>Property Panel</b> to hide this item.

## Chapter 2

# Resolved issues

This chapter lists previously reported issues that are resolved when you install Kofax Insight 6.3.0.

## Exporting grids took infinite amount of time

**1479074, 1478963:** If you attempted to export a grid with over 100,000 rows to a .csv or Excel file, the process was delayed indefinitely.

## Dimension excluded from derived metric

**1350310:** If you changed the dimension ID, the dimension was not used in the derived metric.

## Translation table series excluded from metric grid

**1350292:** If you changed the translation table attribute ID, the translation table series was excluded from the metric grid.

## Wrong icon used for file source type

**1329052:** When you selected a file as a source, a wrong icon was displayed on the screen.

## SUM transformation added automatically

**1324333:** If you mapped a derived field with an aggregation function as a metric value, another transformation function SUM was added automatically, which resulted in an exception when reading or loading data for this metric.

## Chapter 3

# Known issues

This chapter describes issues that you may encounter while using Kofax Insight 6.3.0. The workarounds are provided, as applicable.

## Wrong theme used when printing current view to PDF

**1456274:** If you assign the non-default theme for a role, and assign the role to a non-admin user, the current view is printed with a wrong theme.

**Note** Defining themes in the **Roles** section in Admin Console is obsolete. This option will be removed in a next release.

**Workaround:** Define the default theme directly in the project in **Tools > Project settings > Project theme** or in a specific layout.

## View from project disappears after editing the view list

**1454550:** If you create a report and add several views from the current project and from a different project, and then edit the list by adding or removing the views from the current project, views from a different project disappear from the view list after closing the **Documents tree** dialog box.

**Workaround:** In the **Documents tree**, before clicking **OK**, select the other projects that contain already added views.

## Custom font applied

**1290170:** If you set a custom font in a label, add the text on a view and select **Use default text style**, the custom font color is still applied.

**Workaround:** Remove the text and add it again.