

Kofax Insight

Installation Guide

Version: 6.0.0

Date: 2018-02-05



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Preface

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

Related documentation

The Kofax Insight documentation set is available from the hosted site at the following URL:

http://docshield.kofax.com/Portal/Products/en_US/Insight/600-j3y2jmmw57/Insight.htm

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

Kofax Insight Release Notes

Contains late-breaking product information not included in this guide.

Kofax Insight Technical Architecture & Highly Available Setup

Contains information about technical architecture and high availability setup instructions.

Kofax Insight Administrator Guide for Azure

Includes information about installing and configuring Kofax Insight in an Azure environment.

Kofax Insight Online Help

Context-sensitive online help is available directly from the following Kofax Insight applications.

Help for Kofax Insight Admin Console

Describes the functions in the Admin Console application.

Help for Kofax Insight Data Loader

Describes the functions in the Data Loader application.

Help for Kofax Insight Multi-Tenant Console

Describes the functions in the Multi-Tenant Console application.

Help for Kofax Insight Studio

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

Help for Kofax Insight Themes and Formats

Describes the functions in the Themes and Formats application.

Help for Kofax Insight Viewer

Describes the functions in the Viewer application.

The documentation set also includes a Tutorial and Sample Project help system. The tutorial, which is intended for use with the Sample project in the Insight installation package, includes practice exercises.

Offline documentation

To make the documentation available for use in offline mode (without an active Internet connection), you need to download it from the Kofax Fulfillment Site after purchasing the product.

1. Download **KofaxInsightOfflineDocumentation6.0.0_EN.zip** from the Downloads page on the Kofax Fulfillment Site.
2. After installing Kofax Insight successfully, extract the contents of the compressed documentation file to the following folder:
`<...>\Program Files\Kofax\Insight 6.0.0\HtmlInsight`
3. To view the online help, start any Kofax Insight application and click the Help icon.

Chapter 1

System requirements

Most software requirements for Kofax Insight are listed in the *Kofax Insight 6.0 Technical Specifications* on the Kofax Insight product support website. We recommend that you review it carefully before installing your product. This chapter is intended to supplement the *Kofax Insight 6.0 Technical Specifications* and to offer information about other requirements and prerequisites.

Client hardware

All Insight clients (the Viewer, Themes and Formats, Admin Console, Multi-Tenant Console, Data Loader, and Studio) are entirely browser-based. 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. Processor/RAM requirements can depend on the data volume and even users volume. 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, 24 GB RAM or higher for the database server, and 32 GB RAM if Insight and the database use the same 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.

Check the *Kofax Insight 6.0 Technical Specifications* for the compatible browsers and their versions.

Server software

See the *Kofax Insight 6.0 Technical Specifications* 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 required

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, the **Microsoft .NET Framework 4.6 or later** must be pre-installed on the server prior to installing Insight.

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 website and install it after Insight is set up.

IIS web server

Before installing Insight, verify that Internet Information Server (IIS) is 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 manually on IIS, the application pool (default or custom) must be .NET v4.0. For Managed pipeline mode, select **Integrated**.

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. We recommend that the application pool has the idle timeout set to zero, so that it always remains 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](#). For the server-based systems, such as Server 2008 and Server 2012, follow the steps below.

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.

Important For IIS 10 on Windows 2016, when you add Role Services for the server, select all the features related to the IIS Web Server. Later, when IIS is installed, you may remove all unnecessary features.

Configure IIS for Windows 7 and Windows 8

1. Using Control Panel, navigate to **Programs > Programs and Features**.
2. Click **Turn Windows features on or off** and select **Internet Information Services**.
3. Select the required options and click **OK**.

IIS settings

Insight works with the default settings for IIS 7 or IIS 8, as listed here.

Common HTTP Features:

- Static Content
- Default Document
- HTTP Errors
- HTTP Redirection

Security

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

Health and Diagnostics

- HTTP Logging

Performance

- Static Content Compression
- Dynamic Content Compression

Management Tools

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

Application Development

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

WCF Services

- HTTP Activation

Metadata repository

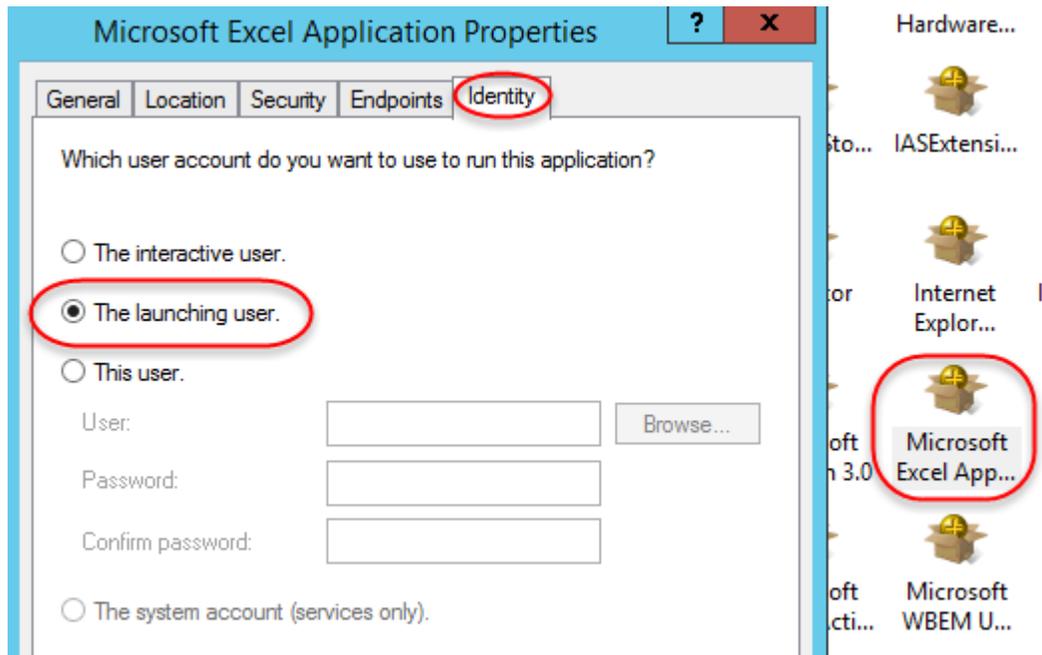
Kofax Insight stores its metadata and calculated data in either Oracle, Microsoft SQL server, or MySQL databases. The database can be located on a dedicated server or on the same shared server with Insight.

If you want to use a separate server, install it prior to installing Insight.

Configure Excel 2016 for parsing files (optional)

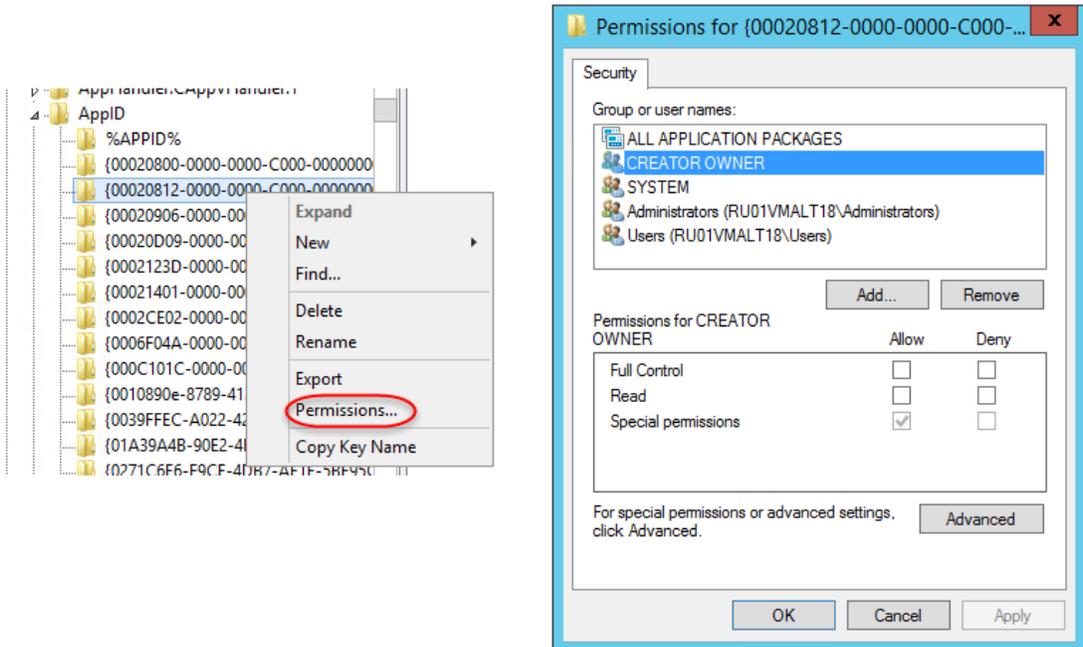
If you have Excel 2016 on the Insight server, follow the steps below to parse files via the File Parser.

1. Log in to the server as an Administrator.
2. Navigate to **Control Panel > System and Security > Administrative Tools > Component Services**.
3. On the Console Root, navigate to **Component Services > Computers > My Computers > DCOM Config** and find "Microsoft Excel Application."
4. Right-click **Microsoft Excel Application** and select **Properties**. On the Identity tab, select **The launching user** and click **OK**.



Now Excel 2016 files can be processed by Insight.

5. If "Microsoft Excel Application" does not appear on the list in **DCOM Config**, you need to edit the registry.
 1. Open a Command Prompt window and run **REGEDIT**.
 2. Navigate to **HKEY_CLASSES_ROOT > AppId**, click **Edit** and search for "{00020812-0000-0000-C000-000000000046}". If this folder is not found, create a new one by right-clicking **AppID > New > Key** and name it **Microsoft Excel Application**.
 3. Also check permission rights to be set as follows.



CREATOR OWNER: "Special permissions" is selected.

SYSTEM: "Full Control" and "Read" are selected.

Administrators (<machine name>\Administrators): "Full Control" and "Read" are selected.

Users (<machine name>\Users): "Read" is selected.

4. Run steps 2-4 to configure processing Excel 2016 files.

Insight license

Although you can install Insight without a license, you cannot use Insight 6.0 until the license is activated. An Insight 5.X license does not work with Insight 6.X. Contact the Insight sales team if you need help to obtain an Insight 6.X license. For instructions, see [Activate the product license](#).

To use multi-tenancy, you need to get a special multi-tenant 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 The Staging DB is optional.

Admin database

The Admin database stores administrative data related to the Insight environment and projects, including users, roles, filtering, alert messages, logs, themes and formats. The Admin database contains information about meta database, and information about other databases is stored in the meta database of each project.

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

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, parameters, constants, and accelerators. No data is stored in the Meta database. Meta database stores localization strings for project documents.
- **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 and tables for the Admin, Meta, Data or staging databases.

MS SQL server

The database administrator can create three databases. An SQL user should have privileges (or have a membership) for the following groups:

- db_datareader
- db_datawriter
- db_ddladmin

Also, the database administrator can create an SQL user with the privilege of creating databases (or have a membership of the db_creator role). In this case, Insight creates databases automatically and no additional assignment of rights is required.

Database Connectors

No additional drivers or connectors are required for Insight to connect to the MS 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.

Access Rights to the Oracle Database

The user must have the following access rights:

- CREATE SESSION
- CREATE TABLE
- CREATE PROCEDURE
- CREATE SEQUENCE

The user must have an appropriate tablespace (also temporary tablespace) quota. Indexes will be stored in the same tablespace.

Example:

```
CREATE USER <USER NAME>  
IDENTIFIED BY <PASSWORD>  
DEFAULT TABLESPACE <TABLESPACE NAME>  
QUOTA UNLIMITED ON <TABLESPACE NAME>  
GRANT
```

CREATE SESSION

CREATE TABLE

CREATE PROCEDURE

CREATE 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.

Port requirements

Insight uses the following ports listed in the table.

Component name	Port	Comments
Insight Web and Data applications and services	80 or 443 for https	<p>The ports can be reconfigured during installation. To reconfigure the port after Insight is installed, do the following.</p> <ol style="list-style-type: none"> 1. Start the Command Prompt window. 2. Run <pre><installation directory> \Insight_6.X.X.\InstallationManager \Altosoft.InsightInstallManager.exe /i.</pre>
Insight Scheduler (Windows service)	135XX where XX stands for the Insight major and minor version numbers, such as 13560 as the port number for Insight 6.0.	<p>To change the port, do the following.</p> <ol style="list-style-type: none"> 1. Navigate to the Insight installation directory at <code>\Program Files\Kofax\Insight 6.0.0\SchedulerServer\</code> and in the <code>AltoSoft.Insight.Scheduler.exe.config</code> file change the <code>SchedulerPort</code> property. 2. Update the port accordingly in the Studio settings.

Component name	Port	Comments
Bridge service (Windows service)	155XX where XX stands for the Insight major and minor version numbers, such as 15560 as the port number for Insight 6.0.	<p>To change the port, do the following.</p> <ol style="list-style-type: none"><li data-bbox="833 386 1438 527">1. Navigate to the Insight installation directory at <code>\Program Files\Kofax\Insight 6.0.0\InsightBridgeService\</code> and in the <code>AltoSoft.Insight.BridgeService.exe.config</code> file, change the <code>BridgeServiceURI</code> property.<li data-bbox="833 543 1438 684">2. Navigate to the Insight installation directory at <code>\Program Files\Kofax\Insight 6.0.0\SchedulerServer\</code> and in the <code>AltoSoft.Insight.Scheduler.exe.config</code> file, change the <code>BridgeServiceURI</code> property.<li data-bbox="833 701 1395 842">3. Navigate to the Insight installation directory at <code>\Program Files\Kofax\Insight 6.0.0\Server\</code> and in the <code>AltoSoft.Insight.DashboardServer.exe.config</code> file, change the <code>BridgeServiceURI</code> property.

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 to the server.
2. Run the [Insight Installation Manager](#) to create and configure the Insight database and Insight web sites on IIS.

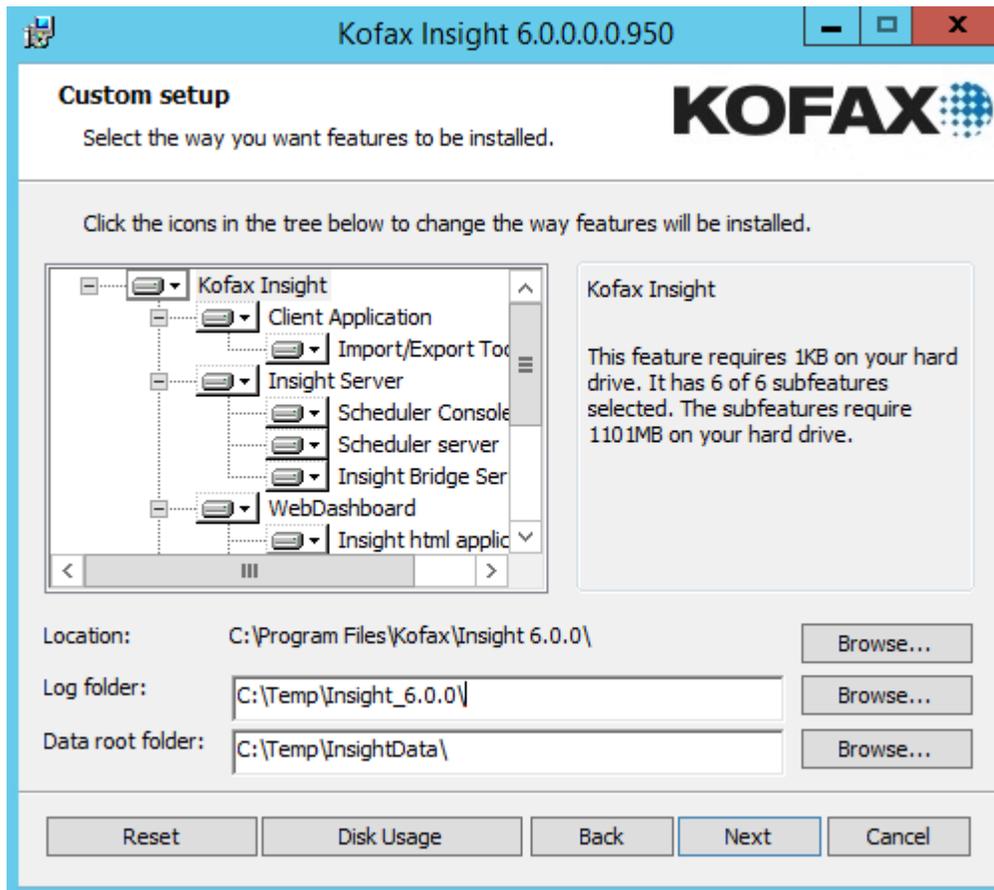
To install Insight using a Windows/Active Directory authenticated database account, see [Install Insight with Windows authentication](#).

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

Important If you reinstall Insight, upgrade it, or apply a service pack, fix pack, or hotfix, this procedure may overwrite all existing configuration files. So, if you made any customization to these files, we recommend to back them up prior to performing any of the above procedures. When Insight is upgraded, you need to manually re-apply all required customizations to the new configuration file.

Install Kofax Insight

1. Download the Kofax Insight product files to the computer where you plan to install the product.
2. Extract KofaxInsight-6.0.0_64-bit.ZIP.
3. Run the applicable .msi file, such as **KofaxInsightSetup_6.0.0.0.<NNNN>_x64.msi**, where <NNNN> is the Insight build number listed in the "Version information" section of the *Kofax Insight 6.0.0 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](#).
8. On the **Custom setup** screen, accept or change the default settings.
An another option, click the **Browse** button to specify a different installation directory.

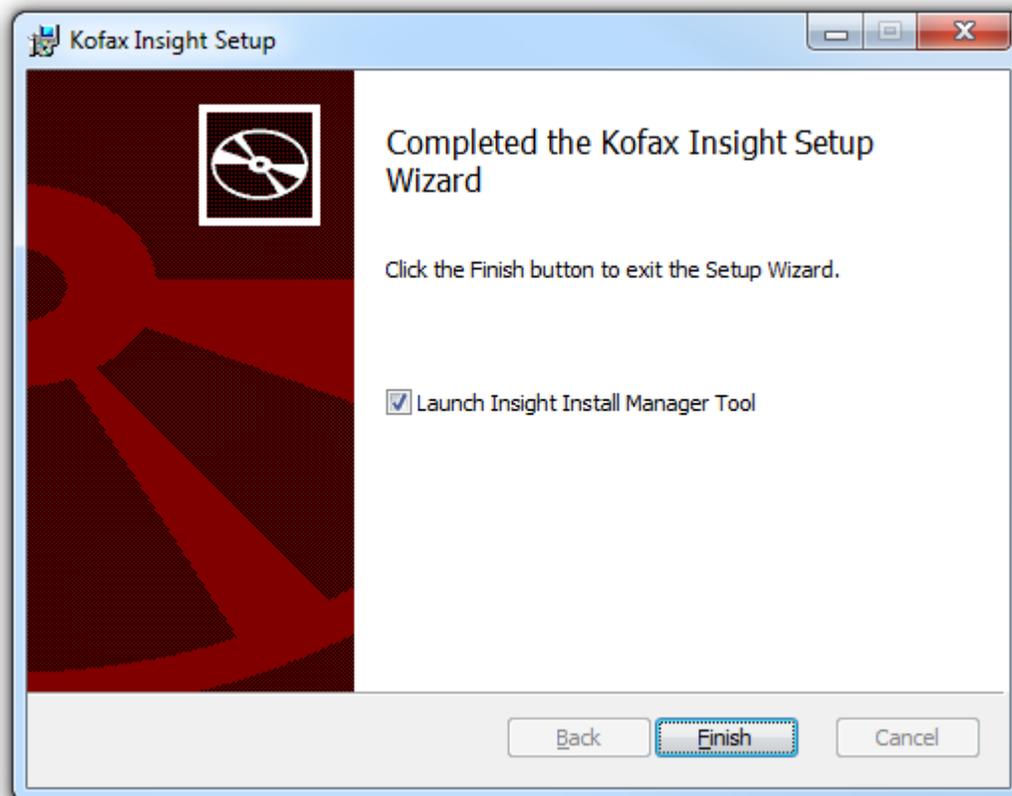


9. Specify a directory or browse for an existing one where to store the log files. Initially, permissions to this folder are granted to everyone.
10. For the **Data root folder** leave the default directory `Temp\InsightData` or browse for any other location. You can change this directory later, after the Insight is installed, in the `Web.config` file located at `Program Files\Kofax\Insight 6.X.X\WcfDataService` and also in the `Web.config` file located at `Program Files\Kofax\Insight 6.X.X\DataFileprocessorService`. You need to set a new folder to the `Insight.DataService.FileRootDirectory` settings and give required rights to the user, such as the Insight pool user must have read/write permissions to this folder. This **Data root folder** is used for all files that you download via Insight. Initially, permissions to this folder are granted to everyone. This directory can contain the following sub-categories.
 - Solution: stores all ZIP files for solution import and creating a project.
 - Documentation: stores copies of the generated project documentation.
 - Reports: stores copies of the generated reports (Excel and PDF).
 - GeoShapes: stores all extracted shape files.
 - ImportExport: stores all extracted project and solution files.

Click **Next**.

Important If you install multiple instances of Insight on a web farm for high availability, share access to the Data root folder so that all Insight instances can access it.

11. On the **Ready to install Kofax Insight** screen, click **Install** to begin the installation.
12. On the **Completed the Kofax Insight Setup Wizard** screen, click **Finish**.



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

Note After a successful installation, all installation steps are logged to a file in the log folder specified previously on the "Custom setup" screen.

Single and Multi-tenancy modes in Insight

Please see this section for more information about the multi-tenancy mode in Insight, because during installation you can select to install Insight either a single-tenant mode (default) or in a multi-tenant mode.

Before proceeding with installing Insight in the multi-tenancy mode, make sure you have a multi-tenant license. Otherwise, contact the Kofax Support Team.

Multi-tenancy overview

In Insight, you can use multi-tenancy to deploy multiple customers (tenants) on the same set of Insight servers where each tenant's data and configuration is protected from other tenants. At the same time, each tenant can configure its own projects, users, authentication, roles, themes, and other parameters.

Each tenant has its own Insight databases (Admin DB, Meta DB, Data DB), and information about all tenants is stored in the Insight MT (Multi-tenant) DB.

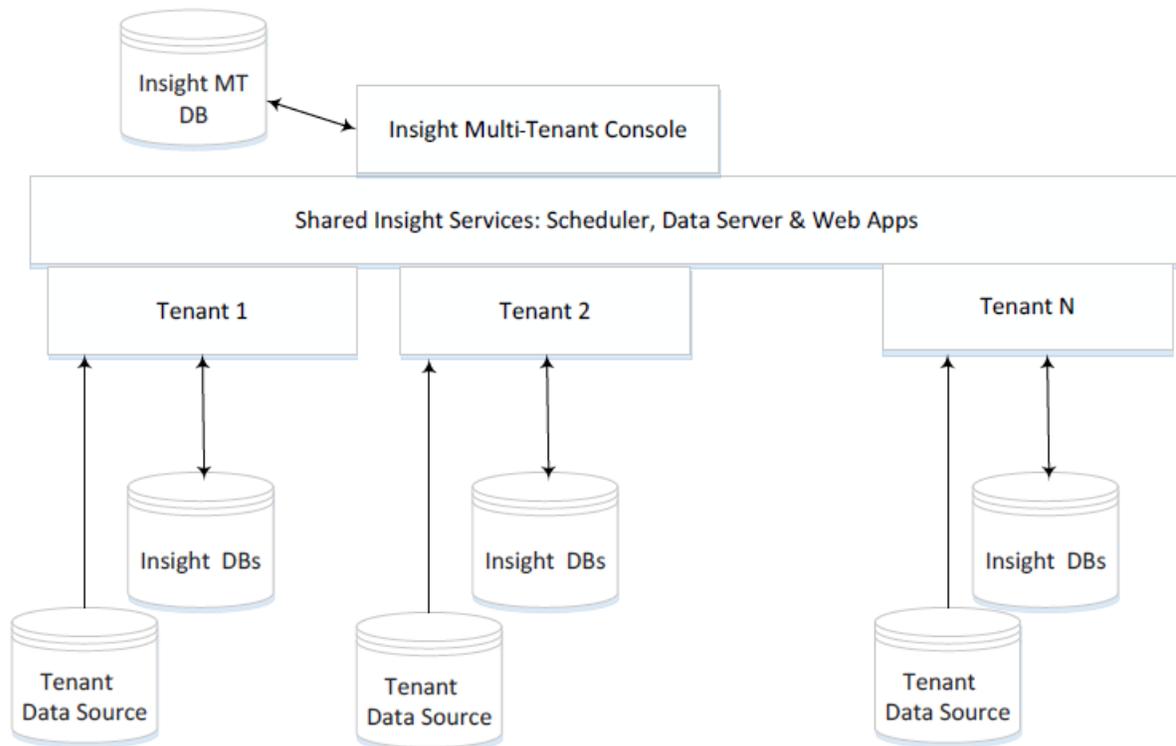
The multi-tenant administrator has the following rights:

- Access to the full Insight system and all the tenants
- Access to Multi-Tenant Console
- Ability to add/remove tenants and their databases
- Perform other actions with tenant's configuration (upgrade, password setup, and more).

A tenant administrator has the following rights:

- Access to all the Insight applications with the exception of Multi-Tenant Console
- Full control over the projects, users, and data within a single given tenant.

The following overview diagram shows the basic principles of multi-tenancy in Insight.



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 you run the Installation Manager after the first successful configuration, you need to provide

credentials for any Admin user. If you need to run the Insight Installation Manager to repair configuration settings or change IIS settings, start the command prompt and run the following: "<installation directory>\Insight_6.X.X.\InstallationManager\Altosoft.Insight.InstallManager.exe /i".

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

1. Specify the following:

1. Select the Insight mode: Single or Multi-Tenant. For the multi-tenant mode, you are prompted about the necessity of having a multi-tenant license.

Note If you select to deploy Insight in a multi-tenant mode, you need to add the license and configure tenants using the Multi-Tenant Console application. The user name to log in as a tenant administrator is *MTAdmin*. Provide the password in the next screen.

2. Connection Type: the server to be used (Microsoft SQL, Oracle, or MySQL).
3. SQL Server Name: enter the server name or the TNS name for the database server.
If you use MySQL or Oracle, ensure that you have the necessary database drivers installed prior to installing Insight.
4. Login and Password: Provide the login credentials for an Admin database.
For the Oracle database, you need to create a user with permissions before installation. For the Microsoft SQL and MySQL databases, Insight creates new databases automatically, but the user must have special rights for creating a database. As another option, you can create the Admin database before installation.
5. Select **Create/Initialize Database** and assign a name for the Insight Admin database.

KOFAX Insight Installation Manager
Components Installation

Insight Mode

Single Multi-Tenant

Insight Engine Database Configuration

Connection Type: MS SQL

SQL Server Name: hostname

Windows authentication

Authentication

Login: sa

Password: ●●●●●●

Databases

Create/Initialize Database Use Existing Database

Administration Database Name: InsightAdmin

Security

Generate Key

NEXT →

6. Select **Generate Key** to encrypt the Insight connections for the security reasons. In this case, the key is generated and stored in a file in the Data folder. The following connections will be encrypted:

- The connection to the Admin database
- The connection document from Admin Console
- The connection to the project meta and data databases
- The connection used in the Data Source document to the databases

Important If the generated file in the Data folder [gets lost](#), you will not be able to work with all these connections.

You may later change the generated key either by running the [Insight Installation Manager](#) or via the [silent installation](#).

2. Click **Next**.

The Insight Web Applications IIS Settings screen appears. Leave the settings as set default, they apply in most cases.

3. 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 [Change Insight configuration after installation](#). To use an SSL connection, select **Use SSL connection**. An SSL certificate on IIS is required.

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.

TCP Port: The default TCP/IP port when using SSL (HTTPS) is 443, and the default non-secure (HTTP) port is 80.

Application Pool Name: Select the created IIS pool name or otherwise enter the new pool name.

Web Site Name: If you already created an IIS website, select it from the list, make sure that the entered TCP port is assigned to this site. Otherwise, click **New** to create a new website, but make sure the entered TCP port is available.



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

4. 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: @ & % *)
5. Specify the Administrator or Multi-Tenant Administrator password, and then type it again.
6. Ignore the "Use remote Insight Data Service" options, and click **Next**.
7. 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.

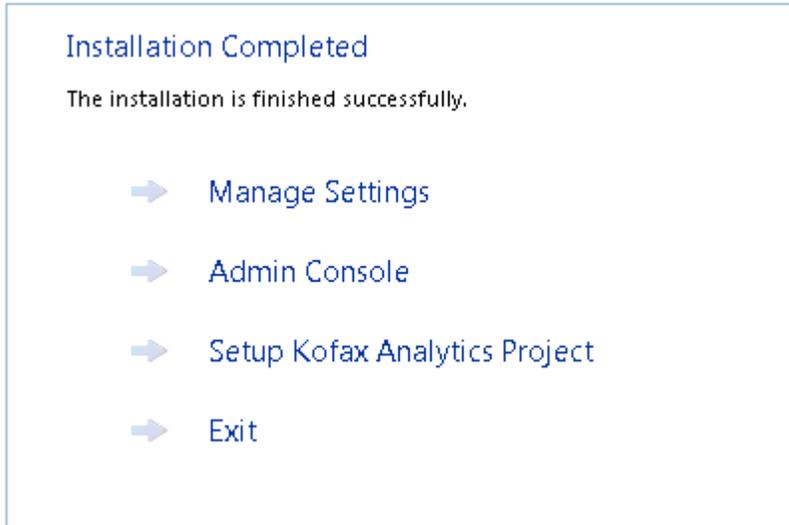
A list of installed components appears while the installation is in progress.



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)

8. When notified that the Insight 6.0 installation is complete, select **Admin Console** and click **Next**.



- 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** to start the Kofax Analytics installation wizard.
- 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 6.0.0** 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.

Change Insight configuration after installation

Use the procedure in this section to change Insight configuration after the installation. For example, change your credentials to the Admin database or specify the SSL connection.

For establishing the SSL connection, 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 6.X.X
```
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 update the settings, as described in [Run the Insight Installation Manager](#).

Change the encrypted key after installation

Use the procedure in this section to change the [generated key](#) after the installation.

1. Open a Command Prompt window.

2. Navigate to the folder where Insight is installed by typing:

```
cd C:\Program Files\Kofax\Insight 6.X.X
```

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. Select the **Change key** check box.

The old key is archived and placed in the ZIP file in the same folder. The new key is generated and used from this moment.

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. Open a Command Prompt window and change to the directory where you extracted Insight product files.
2. Run the following command:

```
msiexec /i KofaxInsightSetup_6.0.0.NNNN_x64.msi /q
```

where **NNNN** is the build number listed in the "Version information" section of the *Kofax Insight Release Notes*.

Note The `/q` runs the Insight installer in a quiet mode (no user interface).

3. To specify the log folder, add the argument `LOGFOLDER="<directory>"` to the command. For example, the command may look like the following: `msiexec /i KofaxInsightSetup_6.0.0.0.1016_x64.msi /quiet LOGFOLDER="D:\Temp"`, where "D:\Temp" is the directory where the log files will be stored.

To specify the data folder, add the argument `DATAFOLDER="<directory>"` to the command. For example, the command may look like the following: `msiexec /i KofaxInsightSetup_6.0.0.0.1016_x64.msi /quiet DATAFOLDER="D:\Temp"`, where "D:\Temp" is the directory where the data files will be stored.

4. Create a file named **InstallManagerSettings.xml** that will contain the configuration settings.
 1. Review the samples in [Silent installation sample configuration files](#). Optionally, add the following commands to the configuration file:
 - `<Security GenerateKey="True"></Security>`: To change the generated encryption key.
 - `<MultiTenant>true</MultiTenant>`: To install Insight in a multi-tenant mode.
 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.
5. Save your configuration file in a separate folder, such as:

```
C:\Insight
```

Note The installer uses `InstallManagerSettings.xml` to obtain the configuration settings that are normally entered from the Installation Manager user interface.

- Run `<installation directory>/Altosoft.Insight.InstallManager.exe /i /a /f "<ConfigurationFilePath>.`

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.

Microsoft SQL Server

```
<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings>
  <InstallDirectory>C:\Program Files\Kofax\Insight 6.0.0</InstallDirectory>
  <DBSettings UseExistingDB="False">
    <ConnectionType>MSSQL</ConnectionType>
    <AuthDBName>AuthDBName</AuthDBName>
    <ServerName IsSQLAuthorisation="False"></ServerName>
    <User>User</User>
    <Password>Password</Password>
  </DBSettings>
  <WebDirContext CreateAppPool="True" CreateWebSite="False" Port="80" UseSSL="False">
    <ApplicationPoolName>InsightPool</ApplicationPoolName>
    <WebSiteName>Default Web Site</WebSiteName>
  </WebDirContext>
  <SharePointEditorURL>ssss</SharePointEditorURL>
  <SharePointViewerURL>ffff</SharePointViewerURL>
  <Projects UpdateAll="False">
  </Projects>
  <AuthSettings Login="Administrator" Password="password">
  </AuthSettings>
</InstallSettings>
```

Microsoft 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>
  <Projects UpdateAll="False">
  </Projects>
  <AuthSettings Login="Administrator" Password="password">
  </AuthSettings>
</InstallSettings>
```

Oracle

```
<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings>
  <InstallDirectory>C:\Program Files\Kofax\Insight 6.0.0</InstallDirectory>
```

```

<DBSettings UseExistingDB="False">
  <ConnectionType>Oracle</ConnectionType>
  <AuthTNS>AuthTNS</AuthTNS>
  <AuthUser>AuthUser</AuthUser>
  <AuthPassword>AuthPassword</AuthPassword>
</DBSettings>
<WebDirContext UseSSL="False" CreateAppPool="True" CreateWebSite="False" Port="80">
  <ApplicationPoolName>InsightPool</ApplicationPoolName>
  <WebSiteName>Default Web Site</WebSiteName>
</WebDirContext>
<Projects UpdateAll="False">
</Projects>
<AuthSettings Login="Administrator" Password="password">
</AuthSettings>
</InstallSettings>

```

MySQL Server

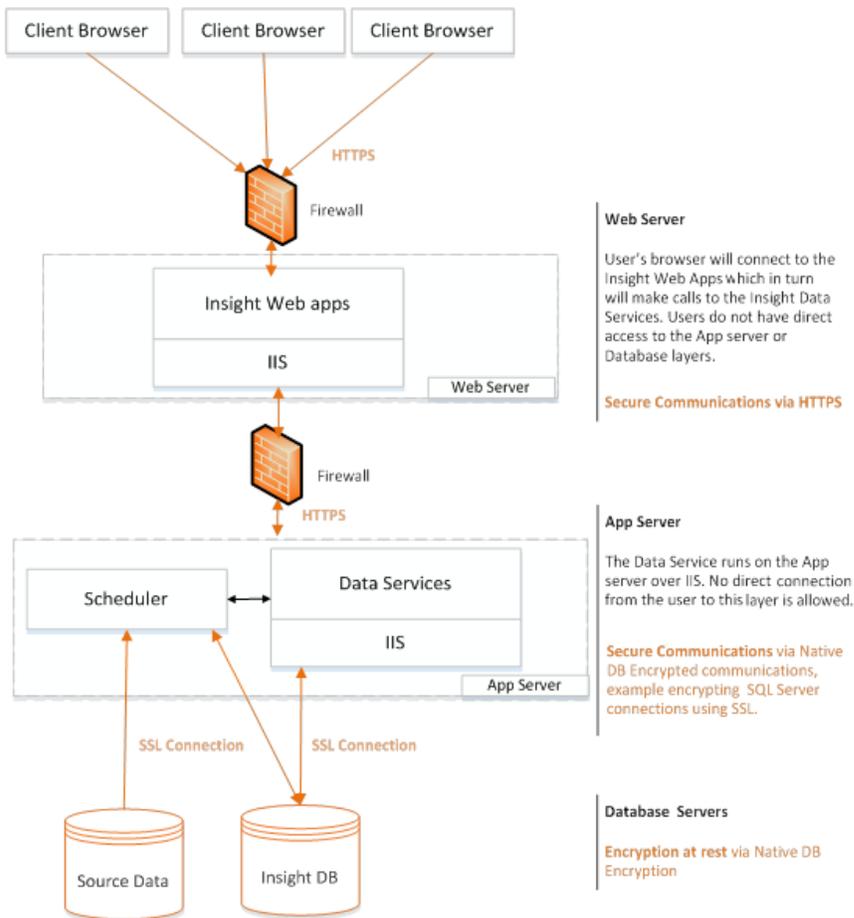
```

<?xml version="1.0" encoding="UTF-8"?>
<InstallSettings>
<InstallDirectory>C:\Program Files\Kofax\Insight 6.0.0</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>
<Projects UpdateAll="False">
</Projects>
  <AuthSettings Login="Administrator" Password="password">
  </AuthSettings>
</InstallSettings>

```

Set up Insight in a three-tier architecture

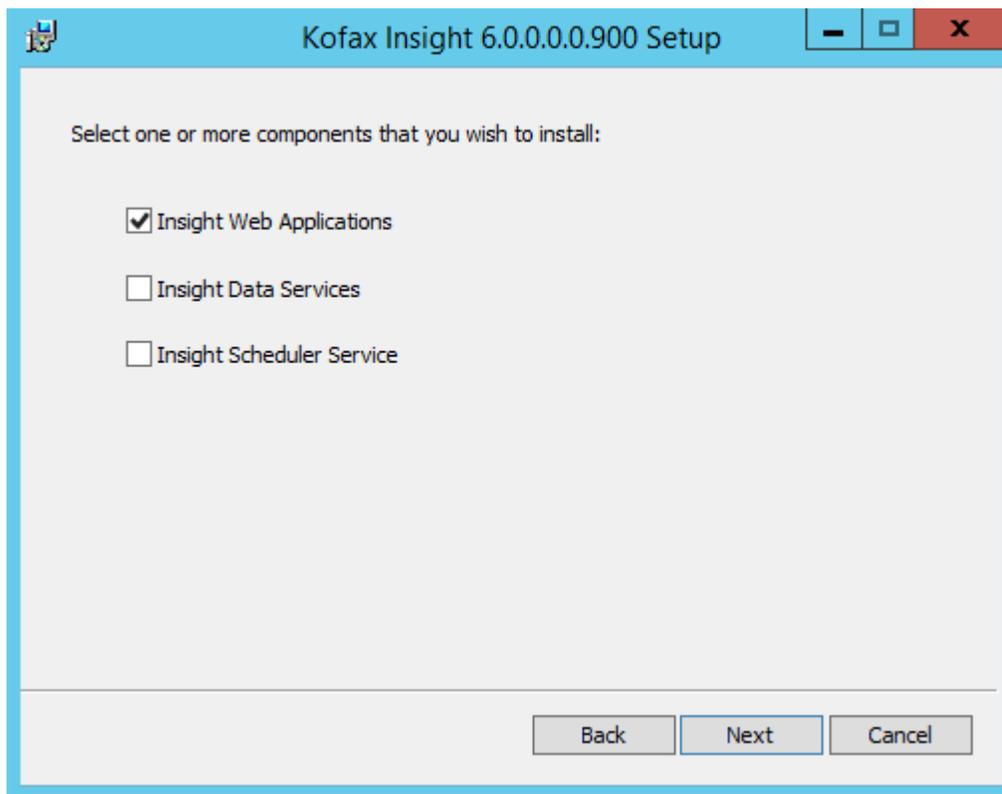
You can set up Insight in a three-tier architecture, where the Web Application is installed on the Web Server layer and the Insight Data Services and Insight Scheduler Services are installed on the App Server layer. This approach may be useful in a large-scale deployment (banking, financial, healthcare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



See the *Technical Architecture & Highly Available Setup Instructions* in the Insight documentation folder for more information.

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.

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

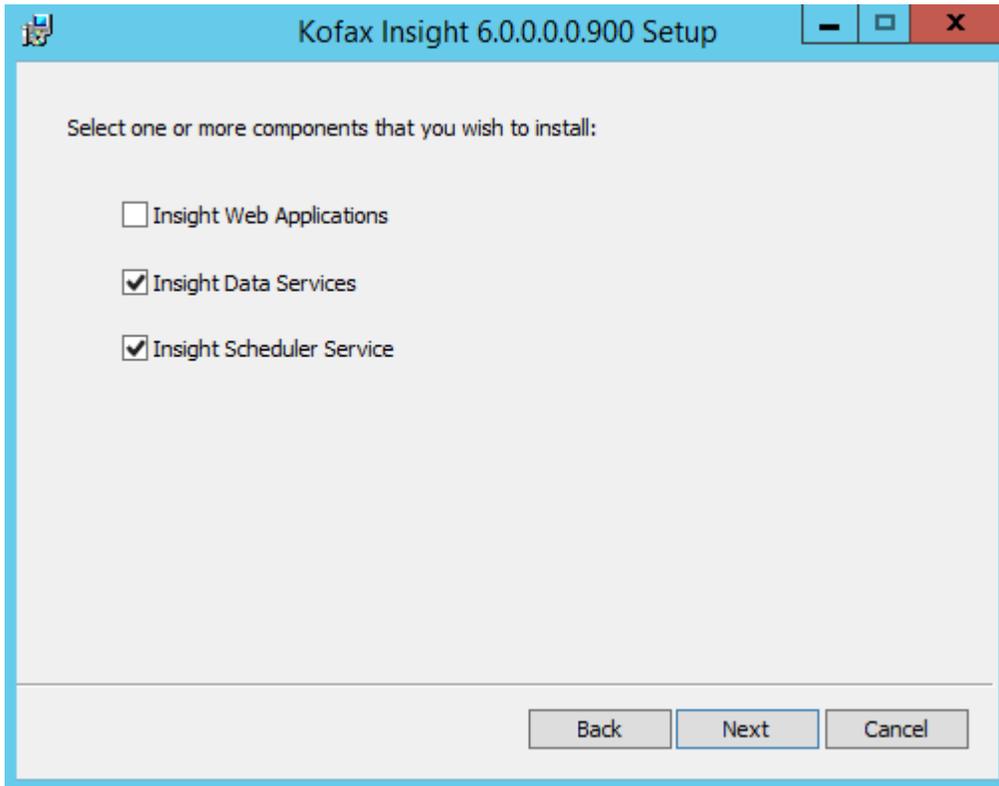
Use remote Insight Data Service
Use this option if you would like to install the Data Services on a remote server.

Host: TCP Port: Use SSL connection

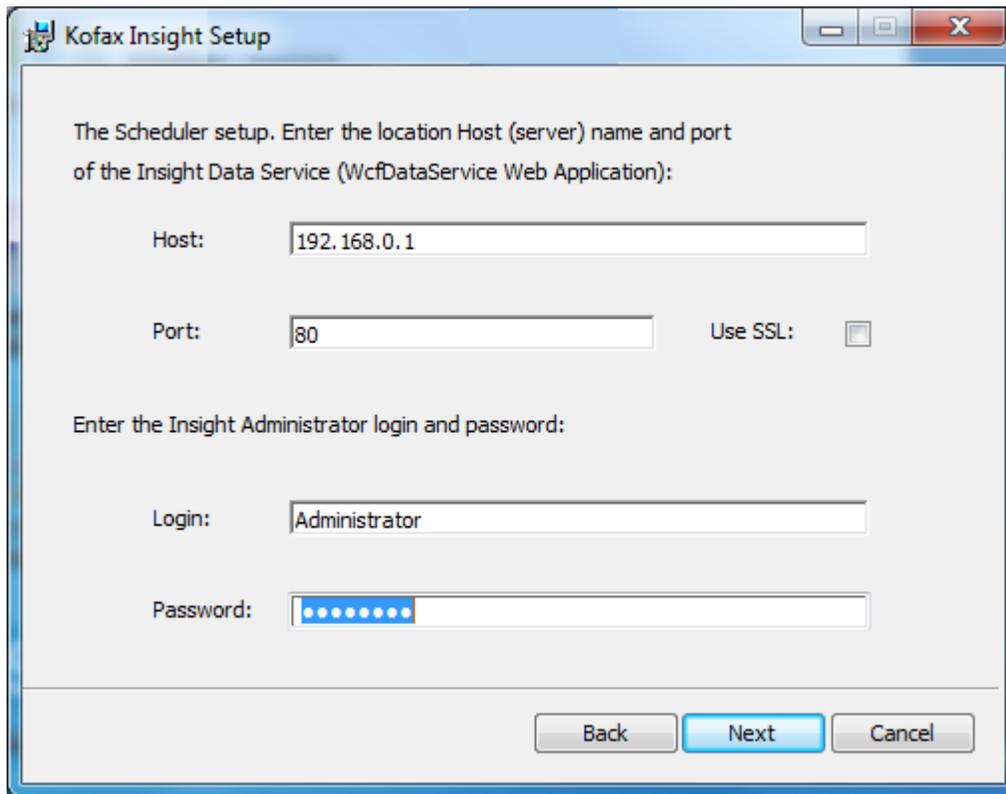
8. Review and confirm the IIS settings, and click **Next**.
The Insight Web Application components are installed.
9. When notified that the Insight 6.0 installation is complete, click **Next**, and then click **Exit**. Proceed to install the Data Service and Scheduler on the App Server.

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 following information: the Data Service Host, Port (the WcfDataService on IIS) and enter the Insight Login information.



The Scheduler setup. Enter the location Host (server) name and port of the Insight Data Service (WcfDataService Web Application):

Host: 192.168.0.1

Port: 80 Use SSL:

Enter the Insight Administrator login and password:

Login: Administrator

Password: ●●●●●●●

Back Next Cancel

Enter the Host and Port of the Insight Data Service (this is the WcfDataService Web Application on IIS). Then enter the Insight Administrator login credentials.

Note Since the Scheduler is installed on a different server than the Web Application, verify that the Scheduler Host IP or name and port is set correctly in Insight Studio project settings when you develop a project. The port of Insight 6.0 Scheduler is 13555. This can be found in **Studio > Tools > Scheduler Configuration**.

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

TCP 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. Do not modify Insight Data Services Settings.
10. Review and confirm the IIS settings, and click **Next**.
The Insight app server components are installed.
11. When notified that the Insight 6.0 installation is complete, click **Next**, and then click **Exit**.
The three-tier installation is completed.

Upgrade Insight

When upgrading to Insight 6.0.0 from an earlier version, do the following:

1. [Upgrade the Insight version and 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.

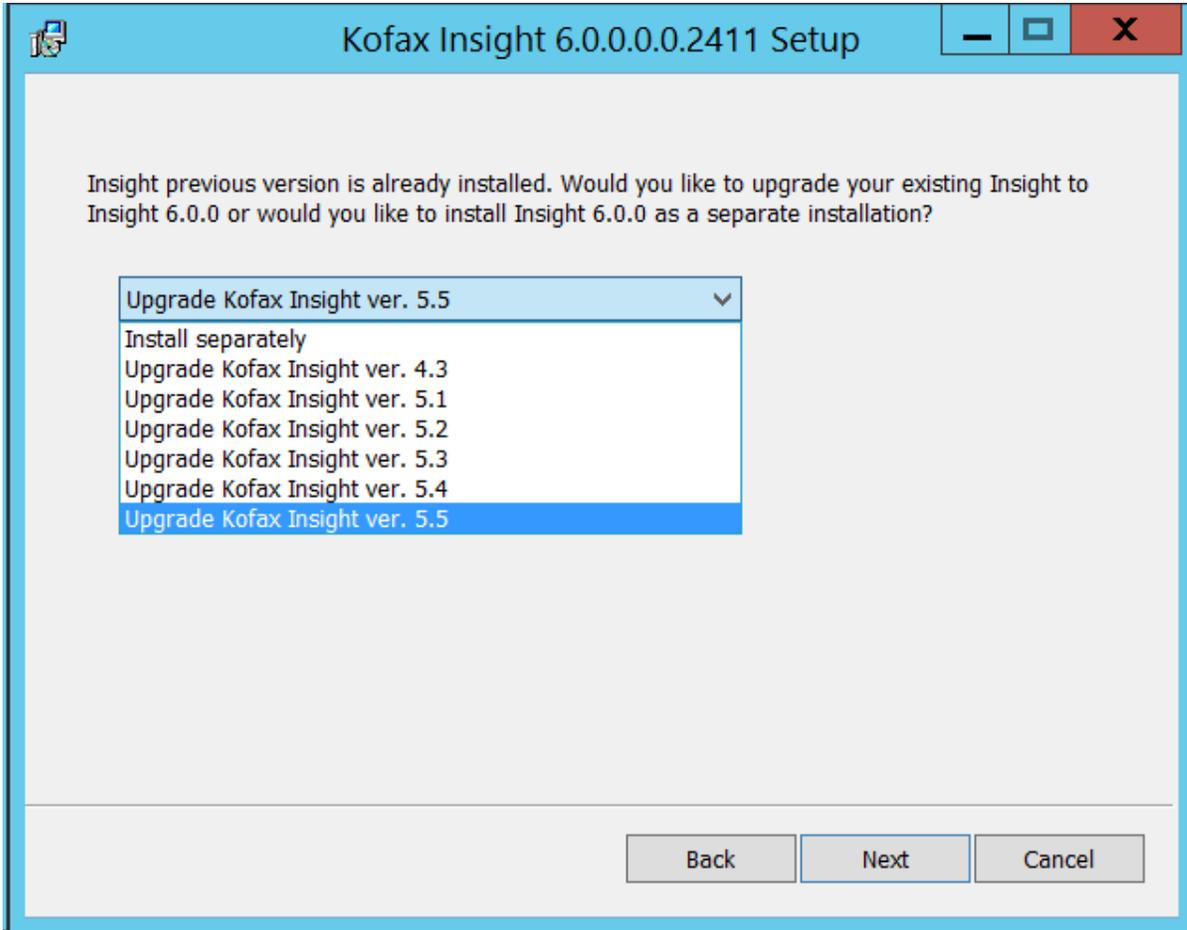
Important If you are upgrading from a version earlier than Insight 4.3.1, you need to first upgrade to 5.5 and then to 6.0. A direct upgrade from a version below 4.3.1 is not supported.

Upgrade the Insight version and Admin database

This section explains how to upgrade the Insight version and Admin database.

1. Keep your existing Insight 6.X installation in place.

2. Run the installer for Insight 6.0, 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. 6.X**, 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. Provide configuration settings. 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.

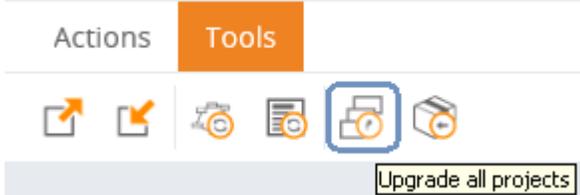
The Admin database is upgraded to the format required for Insight 6.0. Once the upgrade is finished, your existing Insight projects are available in Admin Console and Studio. To upgrade your projects, see the next section.

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** and provide your credentials.
2. On the **Tools** tab, on the toolbar, click **Upgrade all projects**.



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

3. 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.

4. Click **Close**.

Install Insight 6.0 alongside previous version

You can install Insight 6.0 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 6.0 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 6.0 Installation Manager. Select the new port. Or you can skip this step and create the site from the Installation Manager.
 2. Use the current version of Insight to export your existing projects and admin settings.

Note Also, you can clone databases and use existing clones for the new Insight version. In this case the databases are updated automatically to the new version. But in this case you should open each project in the Admin database, do not update the existing project, but click **Change** and then provide the credentials to the copied project databases.

2. When you run the Insight 6.0 installer, select **Install separately** on the screen that appears after the license agreement.
3. Run the [Installation Manager](#) but use the new Admin database for the new Insight version.
4. Start Insight 6.0 Admin Console, create a new project, and then import the projects and Admin settings that were exported from the earlier version of Insight.

Appendix A

Recover from a lockout

A lockout may occur in the event that the administrator configures Windows authentication for Insight applications (Admin Console, Multi-Tenant Console, Viewer, Studio, Themes and Formats, or Data Loader) incorrectly and cannot log in. Use this procedure to recover from a lockout and restore the Authentication setting to None.

1. Locate **Web.config** at Program Files\Kofax\Insight\HtmlInsight\Admin.
2. Verify that the key `PreventConfigChange` is *True* under the `<appSettings>`. If not, add the following:

```
<add key="PreventConfigChange" value="true"/>
```

3. Change the authorization to the following:

```
<authorization>  
  <allow users="*" />  
</authorization>
```

4. Change the authentication mode to `None`.

```
<authentication mode="None">
```
5. Repeat the procedure for other Insight applications, such as the Viewer, Studio, Themes and Formats, or Data Loader.

Log in to an application as an Insight user

1. Locate the **Web.config** file at Program Files\Kofax\Insight\HtmlInsight\Admin.
2. Verify that `<add key="Insight.DataService.TryInsightUsers` is *True*.
3. Access the application which has an incorrect login setup. In the address line, add `Login.aspx` at the end of the address.
4. Log in to the application as an Insight user.

Appendix B

Repair connection strings and apply a new encryption key

Use this section if the encryption key is not available any more.

- To re-enter credentials for the Admin DB, run the Installation Manager in the *Install* mode (with the \i key).
- To re-enter credentials for the admin connection, launch Admin Console, open all connections and provide the credentials.
- To re-enter project credentials, open each project in Admin Console and provide the credentials.
- To re-enter data source credentials, expand a project, open each data source, and provide the credentials.

Install Insight with Windows authentication

The Windows/Active Directory account must have the required access to the database and must 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 6.0 to run using the Windows/Active Directory account identity.
 1. In the Control Panel, select **Administrative Tools > Services**.
 2. Right-click **Insight Scheduler Service 6.0** 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.

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 Admin Console Help* to set up your Insight projects using Windows Authentication.

Troubleshoot Windows Active Directory authentication

In case of a login failure, use the following steps to troubleshoot the issue. Perform an attempt to log in to the Viewer or Insight to capture the HTTP session parameters and values from the Windows Active Directory into the log file.

1. Verify that Authentication and User mapping settings are configured properly.

Note For example, if you set up Windows authentication for the Viewer, make sure that under Authentication and User mapping settings the application is set as "Viewer."

2. Check the log files: navigate to `C:\Temp\Insight_6.x.x.`
3. Open `WcfDataService.log`.
4. Search for "WcfDataService.Code.InsightService.LoginProvider."
5. Scroll to the Active Directory properties list. If you use *Identity* as the session parameter in the user Identifier, search for the "Identity" key word and verify it passes the correct value as expected. Also, search for *memberOf* and verify that the value is correct.
6. Verify that you have specified the property being returned. Also, if the list is separated by commas, verify that you specified *Include* in your Fixed values mapping for the role:

```
givenName: John distinguishedName: CN=John
Doe,OU=Users,OU=US05,OU=US,OU=Countries,DC=MyCompany,DC=com instanceType: 4
whenCreated: 5/7/2014 8:52:59 PM whenChanged: 1/25/2016 8:37:08 PM displayName:
John Doe otherTelephone: 2154446666 uSNCreated: System.__ComObject memberOf:
MyCompany.MyDept, CRMReportingGroup, CRMReportingGroupDev, MyDepartment_US,
MyDept_Media, All MyDept, Products_users, ProjectServer, ProjectManagers, VPN
Users uSNChanged: System.__ComObject co: United States department: MyDept -
Products company: MyCompany Inc. proxyAddresses: SMTP:John.Doe@MyCompany.com,
smtp:hDoe@MyDept.com, SIP:John.Doe@MyCompany.com, smtp:John.Doe@MyDept.com
countryCode: 840 employeeID: 5648 homeDirectory: \\us05401\users$\John.Doe
homeDrive: U: badPasswordTime: System.__ComObject lastLogoff:
System.__ComObject lastLogon: System.__ComObject pwdLastSet: System.__ComObject
primaryGroupID: 513 objectSid: System.Byte[] accountExpires: System.__ComObject
logonCount: 1368 sAMAccountName: John.Doe
```

Appendix E

Insight log files

This section gives you an overview of the information that is available in the Insight log files, which are located at the directory specified during installation:

C:\Temp\Insight_6.X.0 where 6.X.0 is the version number.

Note All 6.0.X versions use 6.0.

Full access (read/write) 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).

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.

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 6.X.0` to the required folder.