

Kofax Insight

Release Notes

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Chapter 1

About this release

The release notes contain late-breaking information about Kofax Insight 6.0.0. 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 6.0.0.0.2609, 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

The primary source of information about Insight requirements and dependencies on other products is the *Kofax Insight 6.0 Technical Specifications*, which can be downloaded from the Kofax Insight page 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.

Important Be sure to review the "Microsoft packages required" 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

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 6.0.0 is now hosted online:

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

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

Offline documentation

If the security policy for your organization restricts Internet access, you can access the documentation in offline mode (without an active Internet connection) while working with Kofax Insight. To access the documentation offline, you can download it as a .zip file from the [Kofax Fulfillment Site](#). The .zip file includes both help and print folders. The print folder contains the *Kofax Insight Installation Guide*, *Kofax Insight Administrator's Guide for Azure*, and the *Kofax Insight Technical Architecture and High Availability Setup Guide*.

1. Download KofaxInsightOfflineDocumentation6.0.0_EN.zip from the Kofax Insight Fulfillment Site.
2. After you install Kofax Insight 6.0.0, extract the contents of the compressed documentation file to the Insight directory at:

```
<...>\Program Files\Kofax\Insight 6.0.0\HtmlInsight
```
3. Launch Insight and click the Help icon: it will launch the help for the installed product.

New features

This section describes the new features introduced in Kofax Insight 6.0.0.

Multi-tenancy

Insight can be set up to support multi-tenancy on the same set of Insight servers where the data for each tenant is segregated. 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. Insight supports multi-tenancy both on-premise and on the cloud (Azure).

For details, click the Help icon from the Multi-Tenant Console application.

Import/Export project documents as separate files

Starting from Insight 6.0, you can export each project document as a separate XML file. In earlier versions of Kofax Insight, a single XML file was used to export all project documents (sources, metrics, records, Views, and more) at the same time.

Automated tests for Insight projects

Create and save your test steps and their results for a project. Later, you can run these steps again (for example, after upgrading the project) to compare final and initial results. For details, see the *Kofax Insight Studio Help*.

R language support

You can use the R language in Insight: create and process R functions, and use them in dashboards. The R language can be used for predictive analysis. For details, see the *Kofax Insight Studio Help*.

Enhancements to View layouts

You can create different layouts based on the screen resolution within the same View. Using the new functionality, you can:

- Configure any dashboard for the regular (desktop) mode and for the mobile mode.
- Add a stacked mobile menu that appears sliding out over the dashboard.
- Add mobile filters.

For details, see the *Kofax Insight Studio Help*.

Retention of custom settings while upgrading Kofax Analytics solutions

You can preserve the following settings when the project upgrade is performed.

- Constants and parameters
- Scheduler settings
- Custom plans
- Remote services
- Styles

Enhancement to the silent installation procedure

You can define connection strings for data sources in the silent installation script. The settings are applied after the silent installation is executed. For details, see the *Kofax Insight Installation Guide*.

Custom encryption

To encrypt connection strings, you can use your own custom key. For details, see the *Kofax Insight Installation Guide*.

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, Multi-Tenant Console, Studio, Themes and Formats, Data Loader, or Viewer applications. Information about installing Insight is described in the *Kofax Insight Installation Guide*.

Project name and version can be added to the dashboards

You can configure the About or Info box on the dashboard to display the project name and version along with the Insight version.

Sample project added

The Sample project is included in Insight so that you can practice working with the product before working with live production data. You can investigate the sample dashboards, read their descriptions and perform basic functions in the Viewer (filtering, drilling-down, and more).

Also, create your own simple Insight dashboards for practice purposes by using the step-by-step instructions from the *Tutorial and Sample Project Help*. The list of basic features included for training includes:

- Metrics
- Translation tables
- Charts
- Metric and record grids
- Data load
- Menus
- Filters
- Calendars
- Alerts
- Reports
- Anchors

All the provided use cases are already finished and preloaded so that you can always open the required document or View at any time to compare the correct results with your results.

Minor improvements to the Insight functionality

Multiple minor improvements are introduced for the Insight functions and procedures, including:

- An option to create a join of two different data sources in an on-demand record.
- When the data is refreshed for a grid, it still maintains the expanded state.
- Each project can overwrite the default layout theme.
- Failed attempts to access Insight Views (dashboards) are tracked in the log files.
- Process chart calculations are optimized.
- For the map component, each pin layer can display a legend.
- Error reports are improved for the Installation Manager.
- During the upgrade procedure, bookmarks are supported.

Changes in behavior

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

Map-Aggregate support discontinued

Starting from Insight 6.0.0, all functionality and user interface references for Map-Aggregate are removed.

Support for multiple schedulers in high availability mode

Unlike in Insight 5.X, where only one scheduler is active and others are passive, Insight 6.0 has one scheduler assigned as the "Main" scheduler. The Main scheduler executes plans and tasks and also assigns tasks to the other schedulers. Should the Main scheduler fail, another scheduler takes its role and becomes the Main scheduler. If the failed scheduler comes back on line, it begins executing tasks that it receives from the Main scheduler.

HTML frame configurations settings changed

By default, Insight cannot be displayed in a frame. To allow opening Insight in frames, find the `web.config` file located in the `HtmlInsight` installation directory and remove or change the `X-frame-option` manually.

Support for 32-bit Insight builds dropped

Insight is no longer delivered in 32-bit builds. Only the 64-bit builds are supported.

Hosted documentation

See [Product documentation](#) for information about accessing the Kofax Insight hosted documentation site. Documentation is no longer included as part of the Kofax Insight product installation.

Mobile Phone and Tablet Gesture Guide discontinued

The *Kofax Insight Mobile Phone and Gesture Guide* is no longer published. All the information about touch screen functions is transferred to the *Kofax Insight Viewer Help* available from the context menu in the Viewer.

Chapter 2

Resolved issues

This chapter lists previously reported issues that are resolved when you install Kofax Insight 6.0.0.

File corrupted after export to Excel

If you drilled down in a metric grid and then exported the grid to Excel, the file was corrupted. (970435)

Overflow exception during calculation of a process metric

An overflow exception occurred and the data was not shown in the grid when a particular process metric was used. (959030)

Data load error

Data load failed when the ADD_MONTH function was used in the time filter. (958659)

Wrong execution plan status

If the execution plan was configured to "Stop execution if a step fails," it still showed the "Started" status even though some of the steps failed. (958651)

Record grid with a Translation Table data series displayed incorrectly

If a record grid with a translation table data series was based on an on-demand record, it did not display any data. (956087)

Slow performance of the View editor and Property Panel

When you opened a View editor with the Property Panel in the Internet Explorer 11 browser, the performance was very slow. (906958)

Data load failure for Oracle

The data load failed when Kofax Insight was used with an Oracle database. (900691)

Incorrect display of the process step grid

When you opened the process step grid in the Google Chrome browser for the first time, the bottom part of the grid was not shown. (899289)

Error in displaying patterns for the process filter definitions

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

Failure in drilling down for grids

Drilling down in grids did not work with Internet Explorer 11. (769150)

Failure in exporting a chart to image for touch devices

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

The 'Start from zero' check box applied to horizontal charts

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

Incorrect display of totals

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

Incorrect filtering by a scatter chart

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

Chapter 3

Known issues

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

Some fonts not applied in PDF report

The following fonts do not show correctly when a dashboard is printed to PDF: Consolas 20, Courier 15, Georgia 15, Symbol 20, Times New Roman 15, and Trebuchet MS 15. (911121)

Spinner icon not shown on iPads

When you open a dashboard with a map component on an iPad and scroll down very fast, the spinner icon is not shown when the map is being updated. (897707)

Metric template name not updated immediately

When you add a metric template to a label component and then edit the template, the old metric still shows even though you select another metric. (737240)

Workaround: Exit the editing mode for the label component to apply the changes.

Deleted View shown in the report

If you have a report with multiple Views and one of the Views is deleted from Studio, the deleted View is not removed from the report and still shows as an empty row. (733940)

Workaround: Update the report and remove the View.

Zoom not working in the Microsoft Edge browser

If you view a dashboard with a scatter chart in the Microsoft Edge browser, you cannot use finger gestures to zoom in on the chart. (733908)

Workaround: Use the mouse to zoom in.

Padding values not applied

If you set padding values for the style properties "Grid total amount style" and "Grid total amount value style," the values do not apply to the grid. (733834)

Incorrect display of the email template

If you select plain text to use for the alert email template, the rich text tools are still displayed. (732676)

Workaround: Do not use the rich text tools for your message.

Incorrect behavior of the grid filter

If you have two grids and the second grid is filtered by the first grid, changing the filters for both grids clears the second grid. (730160)

New alert messages grid not showing all messages

If you create a new alert messages grid and save the View, it does not display all the existing messages. (667804)

Workaround: To see all the messages in the grid, refresh the View after saving.