

# Kofax Insight

5.2.0

## Release Notes



2015-07-10

## Contents

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# About This Release

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

## Product Name

The product name of Kofax Altosoft Insight has been changed to **Kofax Insight**. This change in name can be seen within the product UI and in all product documentation and guides.

## Version Information

This Kofax Insight 5.2.0 product is identified by build number 5.2.0.0.3182, which is listed in the About window on the Kofax Insight Admin, Themes & Font Manager, Studio or Designer.

## License

A valid Insight 5 license is required. Any valid Insight 5.x license will work with this release. However, if you have an Insight 4.x license, that license will not work and you will need to obtain an Insight 5 license.

To obtain the license, please contact the Kofax Sales Support group in your region.

## System Requirements

The primary source of information about Kofax Insight requirements and dependencies on other products, including Kofax Analytics for Capture and Kofax Analytics for Total Agility, is the *Cross Product Compatibility Matrix*, which is available on the Kofax website at [www.kofax.com](http://www.kofax.com). The matrix is updated regularly, and we recommend that you review it carefully to ensure success with your Kofax Insight product.

## New Features

This section describes features introduced in this release of Kofax Insight.

### New Chart components

There are several new chart components added, including many Advanced charts. These include Trellis Charts, Waterfall, Polar, Area range, Combination pie charts, funnel, pyramid, box-plot and combination charts with multiple axis.

### Global Calendar in Components

Each data component can now be parameterized with a global calendar via the property panel in order to show the data that corresponds to the calendar working hours.

### Adding an excel file as a data source is a record

A user can now add an excel file as a data source directly from the record.

### End user self service enablement

The end user can update the data of a record from the dashboard by dragging an excel file to a special component on the dashboard.

### Alerts improvements – custom email

A customizable rich text can be sent when an alert is triggered. Users are now able to set up an e-mail template for any type of an alert. The template can contain data fields from the record. The template can be either plain or rich text.

### Alerts improvements – Web Service Call

End users can define an external web service that will be called right after an alert is triggered.

### Data source with multiple connection strings

A data source may contain server connection strings to different databases provided that the structures of each of the databases are the same.

### Recommendation for Map Aggregate settings

The Map Aggregate profiler can now generate a recommended manifest (a set of plans) for the Map Aggregate based on analyzing the data that is delivered to the dashboard (View).

### Administration Console

A new console in the Admin provides information system such as current logins, project use, individual project DB size and Insight Admin DB size. It also allows the administrator to view access rights by projects and datasource.

## Improved document access rights

An administrator can grant read or write access right to any specific project document for any role. All documents are restricted by default.

## Improved Custom SQL function

The user can now define a custom SQL function that can be used in the expression editor. The function may be database specific.

## Customized fonts

Users can now add their own customized fonts and use them in their themes.

## Improved end-user language selection

End users have the ability to select their language based on the context menu (right click) from the dashboard.

## Changes in Behavior

This section describes product behavior that differs from the previous Kofax Insight release.

### Change in Default Font

The default font for Insight 5.2 is Tahoma and has been changed from Gothic Century.

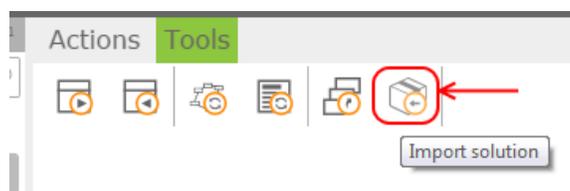
**Note** Users who would like to continue to use Gothic Century they should add it as a **Custom Font** – See the *Kofax Insight 5.2 - Themes and Formats Manager* for details.

### Charts now have extended chart

Basic chart types now have an extended functionality for display wizard. Now it is possible to set each parameter – drilldown, grouping, axis, Z-index, etc. for each series (previously it was only possible for all series at once).

If there are 2 series in the chart, currently there is no requirement to have at least one breakdown as a data series.

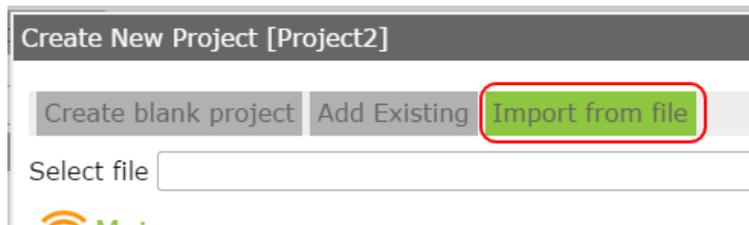
### Importing an Analytic Solution (for KAFC, KAFTA etc. projects)



The way an Analytic Solution is imported into Insight has changed. Analytic solutions can no longer be imported from the Project >> “Import from file” tab. All solutions such as KAFC.zip and KAFTA.zip need to be imported into Insight from the **Import Solution** tool which can be found under the “Tools” tab in the Admin. Please see the *Admin Guide* for details.

## Create New Project from File

The Create New Project from file feature (from Insight Admin) no longer imports Analytics solutions. This feature however, continues to allow the user to import an Insight project that was exported from Studio.



## Installation Notes

This section lists important installation and upgrade notes.

### Install Insight in a 3-tier architecture

Insight can now be installed in a 3-tier architecture where the Web Applications, Data Services and Scheduler can be installed on separate servers. In a 3-tier deployment, the Web Applications can be installed on the Web Server running IIS, the Data Services and Scheduler can be installed on the Application Server. The Data Services and Scheduler are the only components that connect directly to the Database.

### Upgrading from Version 5.1

The instructions for upgrading from older version of Kofax Insight are included in the *Kofax Insight 5.2 - Installation Guide*.

# Resolved Issues

This section lists previously reported issues that are resolved when you install Kofax Insight 5.2.0.

| ID     | Title  |
|--------|--|
| 540582 | In record with external relation tables from one source are not grouped.                                     |
| 541583 | Unable to copy-paste table subtree to the same record.   |
| 542664 | 'Couldn't load global documents' message after printing of view on preview.                                  |
| 547586 | Return 'between' operator to conditional coloring wizard.  |
| 547858 | Renaming folder in Documents tree affects only after refresh (F5).   |
| 547894 | Record filter values cannot be printed to pdf.   |
| 548543 | Unable to edit field with assigned TT in record grid.  |
| 549272 | Error occurs on pie chart with marker at hiding labels.  |
| 550040 | Animation on bubble chart doesn't show any data.   |
| 550045 | Layout issues in localized Insight.  |
| 550158 | If UseExistingDB="False" at silent installation then Installation Manager should create/initialize new base. |
| 550702 | Unable to load large file in template.   |
| 551795 | Metric/record source join dialog is slow.  |
| 552663 | If several field is not mapped On-demand record with Union Join can't be loaded in Viewer.                   |
| 552822 | Drag and Drop Period Drivers not working.  |
| 561240 | Unable to change color for template after conversion from 431.   |
| 561469 | Data load ignores error in File parser steps.  |
| 561720 | Object Reference Exception is shown at the login page when a role has empty query.                           |
| 562983 | Clear browser data when personal settings format is changed.   |
| 562999 | Filter display backwards.  |
| 563863 | Filter's drop down has wrong width if search enabled for this filter component.                              |
| 565736 | Update 431 to 5.* shouldn't recreate Metric table's indexes.   |
| 566834 | "Stacked bar 100%" shows 10.000% instead.  |
| 571426 | It's impossible define format for auto metric.   |
| 584477 | FTP site details are not saved after editing.  |
| 595461 | Cannot load data due SQL query uses more 10 @conditionParameters.  |
| 609723 | Unable to open bookmark if 'UseUri' setting is on.   |
| 611146 | UI display issue on iPad 3 with iOS 6 - cropped value in chart.  |
| 613015 | The "Can Edit" property does not function as it should.  |
| 625796 | File parser editor loses separator setting for semicolon after saving / re-opening.                          |

# Known Issues

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

## List of Known Issues

| ID     | Title  |
|--------|--|
| 588463 | Can't Load Forecast metric with dimensions.                                      |
| 613206 | Record grid doesn't set field value to filter group until 'Request data' is true |
| 614259 | Numeric aggregation are unavailable for field with changed type                  |
| 619212 | Data inserting still happens after cancel in import/export utility.              |
| 619507 | Entity driver value is not reset by reset button                                 |
| 619834 | Data load failed for the record based on another record which is joined with TT  |
| 620813 | Error occurs after changing ID of process step property                          |
| 621207 | Sorting by metric value doesn't work for second drill-down                       |
| 621936 | Map-aggregation UI: 'Use default port' should be checked by default              |
| 622251 | Bookmark doesn't open after the update from 5.x to 5.2                           |
| 624380 | Series selection is cleared after chart refresh.                                 |