Kofax Insight

Release Notes

Version: 5.4.0

Date: 2016-09-29

KOFAX
from Lexmark

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Chapter 1

About this release

The release notes contain late-breaking information about Kofax Insight 5.4.0. Please read this document carefully, as it contains information that is not available in other Insight documentation.

Version information

This product is identified by build number 5.4.0.2069, as listed in the About window, which you can access from the Actions tab toolbar in any Insight application (Admin Console, Studio, Themes and Formats, or Data Loader).

System requirements

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

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

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

New features

This section describes the new features introduced in Kofax Insight 5.4.0.

Insight analytics

Enhanced web service support for actionable analytics

The web call service is enhanced to let you call APIs from the Viewer (dashboard) that require session IDs.

Import of Kofax TotalAgility processes

You can import a Kofax TotalAgility process that contains case fragments (or sub-processes). Then you can use Process Intelligence features of Insight to analyze TotalAgility processes and create swimlane paths to see individual transition paths. For details, see the Insight Studio online help.

Analytics improvements

Using advanced analytics, you can:

- Add reference lines to a chart: Average, StdDev (Standard Deviation), Max (Maximum), and Min (Minimum).
- Calculate the percentile rank for the grid.
- Add standard deviations and sub averages to a metric grid.

Business intelligence

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

SAP BW (Business Warehouse) connectivity

You can connect to SAP BW cubes and create dashboards based on their measures.

Linear regression predictive analysis

The linear regression is enhanced to let you create regression metrics for predictive analysis and "what-if" scenarios.

Filtering by key field in a grid

Define one field in a grid as a key field, and then use it as a filter for other components in the active group. This feature improves performance when grids are used as filters.

Process intelligence and behavior-based analytics

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

Swimlane groups

Unite different process paths in the swimlane chart into different groups (swimlane groups) and drill down any metric based on these groups.

Process filters

Create a process filter and use it to drill down into any data set. In this case, the process behavior is used as a dimension for filtering (with a Yes/No value).

Enhanced user interface and documentation

Enhancements throughout the user interface, including the wizard screens and online help, offer an improved user experience.

Online help is available directly from the Studio, Themes and Formats, or Data Loader applications. Information about Admin Console functionality is described in the *Insight Administrator's Guide,* which is available from the `Documentation` folder.

Enhanced audit logs

In the audit logs in the Administrator database, you can view login success cases, login failures, logouts, attempts to change the privilege level, changes in users and roles, and password revisions. For details, see the *Insight Administrator's Guide.*

Component enhancements

For details about the Component enhancements, see the Insight Studio online help.

Data load from the Viewer

You can configure an actionable component to trigger a data load from the Viewer based on filters in the group.

Ability to sort data load log by seconds, milliseconds

In addition to sorting data the data load log by minutes, you can sort it be seconds or milliseconds. (664826)

Record grid filter groups

You can create two groups for filtering record grids: one for single selection in the grid and one for multiple selection.

Changes in behavior

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

Default Administrator password discontinued

A default Administrator password is no longer assigned automatically by Insight. You must specify the Administrator password during the product installation.

When upgrading from a previous version of Insight, you can continue with the previous Administrator password by specifying it during the installation procedure.

Rebuild indexes

The Rebuild indexes option is selected by default for the documents created before Insight version 5.4.0. For documents created with version 5.4.0, the Rebuild Indexes option is not selected by default.

Save and Preview buttons

The Save and Preview buttons are available directly from the dashboard for immediate access. You do not need to navigate to the Tools menu to access these buttons.

HTML Encode and URL Field properties

In Insight 5.4.0, the HTML Encode property works independently of the URL Field property. In Insight 5.3.1.x, the HTML Encode property had no effect if the URL Field property was enabled. (724823)

Current behavior:

- **HTML Encode property**: To display HTML tags as plain text, enable the property. To parse and decode HTML tags by the HTML engine, disable the property.
- **URL Field property**: If a field contains a URL that you want to display as a clickable hyperlink, enable the property. To display the URL as plain text, disable the property.

Due to this change, we recommend that you verify all records and metrics that use the HTML Encode and URL Field properties to ensure they are set properly. For more information, see the Studio help.

Chapter 2

Resolved issues

This chapter lists previously reported issues that are resolved when you install Kofax Insight 5.4.0.

Currency field changed to text after export to Excel

If you created a view based on a currency metric and then exported it to Excel, the data type was changed to text. As a result, the currency value was replaced with text. (722836)

File processor issue with Excel 2016 .xlsx files

The file processor did not work with Excel 2016 .xlsx files. As a result, an error occurred if you attempted to parse the files by opening them as text files. (721351)

External filter not applied to record grid

If you defined a series filter for a record grid, the external filter was not applied. (713307)

First value not displayed after instance of empty value

If one record contained a dimension with an empty value, the next record failed to display the first available value for a dimension, even though the value was available. (712888)

Data duplicated on record grids

When the Export to Excel feature was in use, duplicate data was generated from the Deleted Batches and Deleted Pages record grid components. (700821)

Total column empty after metric grid exported to Excel

If a metric grid was exported to Excel, the values in the Total column were empty. (700264)

Incorrect percentages listed in tooltips for stacked bar component

In a stacked bar chart component, the percentages listed in tooltips were not accurate. (699127)

Data deleted if process loaded twice during one minute

If a data load interval did not exist, process data was deleted if you loaded the process twice within the same minute. (694699)

Folder deletion affects moved metric

If you moved a metric from one folder to another, the metric was deleted if you deleted the original folder where it resided. (689451)

Duration not updated on Load Console after manual data load

After a manual data load was performed, the Duration value on the Load Console displayed as 00:00:00. (687501)

Filters not applied with custom queries

When a custom query was used, the filters were not applied. (687469)

Switch from edit to resize mode affected label text

If you switched from editing a text label to resizing it, the text did not display properly and sometimes disappeared. (685926)

Non-admin user unable to edit Execution Plan or colors

A non-admin user was unable to edit an Execution Plan or update colors, even though the rights were not explicitly excluded from the user's role. (685257)

Date and time format could not be set for time period

Although the time period was available in the document structure, an option to set the Date and Time format was not available on the Property Panel. (684352)

Filters not applied to component after refresh

If you set a filter for a trellis chart based on three dimensions, the filter was not applied after the chart was refreshed. (679394)

Menu item not marked as selected after multiple actions assigned

If you assigned multiple actions to a view holder, the selected action was not refreshed when you switched from one action to another. (679121)

Unable to scroll in Search panel or Record form

If you created a Search panel or record form with a significant number of fields, scroll bars were not available for navigation. (676337)

Calculation of averages inaccurate

Calculation of averages was not correct for multiple metrics within a standard metric. The calculation of averages was correct if a standard metric used only one metric. (675916)

Scroll bars not present in Preview

If you used Preview in Studio or "Display view in new window," horizontal and vertical scrolling were not applicable if the Views exceeded the size of the Preview window. (674803)

Metric grid: Unable to use multiple rows as a filter

On a metric grid, you could not use multiple rows as a filter. (668647)

Count always in the last column of record grid

The "Count" always appeared in the last column on a record grid, even if you set it to another column position. (667949)

Format item missing from Property panel

If you created a record grid to add a "Count" aggregation to a field that was non-numeric, the "Format" item was not available on the Property panel. (667943)

Chapter 3

Known issues

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

Error during processing multiple metrics with the AVG function

If there are multiple AVG metrics from one standard metric, an error occurs during processing if you set it to the "Store, using overwrite logic" storage option. (748446)

Workaround: Change the storage option to "On-demand, do not store."

Error during project import from Insight 5.3

If you attempt to import a project from Insight 5.3 to 5.4, the following error occurs if the translation table for a record refers back to the same record. (745350)

```
Unhandled Microsoft .NET Framework exception occurred in w3wp.exe
```

Workaround: In Insight 5.3, modify the project so that the translation table does not refer back to the same record. Then import the project to Insight 5.4 and recreate the translation table.

Bookmark error

If authentication is set to "HTTP request + fixed values," the following error occurs when you attempt to open a bookmark (737554):

```
"Login failed. User Id is empty."
```

Cannot scroll to hidden grid content

If you attempt to use Microsoft Edge scroll bars on a Microsoft Surface device to access hidden areas of a grid within a view, they cannot be displayed. (734113)

Zoom options do not display on scatter chart

If you attempt to use your finger to display zoom options for a scatter chart, they do not appear if you are using Microsoft Edge on a Microsoft Surface device. (733908)

Truncated values in grid columns

If a grid contains a lengthy value that exceeds the column width, the value is truncated and cannot be viewed in full. (706332)