



# OpenText Core Data Discovery & Risk Insights

Application Version 25.3.0

Processing Agent Version 25.3.101

## Release Notes

Document Release Date: August 2025  
Software Release Date: August 2025

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# OpenText Core Data Discovery & Risk Insights Release Notes

**Application version:** 25.3.0

**Processing Agent version:** 25.3.101

**Publication date:** August 2025

This document is an overview of the changes made to the OpenText Core Data Discovery & Risk Insights application and processing agent.

## Support matrix

For information about the installation requirements and compatibility with other products, see the OpenText Core Data Discovery & Risk Insights Support Matrix. The support matrix may be updated between releases so it is available only from the [Support portal](#).

## About OpenText Core Data Discovery & Risk Insights

OpenText Core Data Discovery & Risk Insights lets you find, protect, and secure sensitive and high-value data within on-premises and cloud data platforms across your enterprise. Identify, collect, and organize content to ensure discovery of sensitive data. Configure how structured and unstructured sources and datasets are processed and categorized with Connect. Analyze your data under management with Analyze. Organize, review, and take action on documents and unstructured data items with Manage.

## About this release

This product release and release notes cover Application 25.3.0 and Processing Agent 25.3.101. These release notes reference changes included in this release only. For information about changes made in prior releases, see the release notes for the desired release.

While the prior release's Processing Agent remains compatible with this application's version for existing functionality, product enhancements and fixes may require an upgrade to the latest version of the agent. In order to facilitate transition to the new version, the existing processing agent can be used for a transitional period of four (4) weeks after upgrade of the application to this release. Beyond this grace period, out of date agents will be automatically disconnected and an upgrade will be mandatory to reconnect and process data.

# What's new

The following features and enhancements are included in this release.

## General

The following features and enhancements apply to more than one component in OpenText Core Data Discovery & Risk Insights 25.3.0.

- Improved the reporting of container file counts and their included documents.

In Connect, the following updates have been made.

- On the ACTIVITY tab of the agent detail panel, the completed items count now represents the number of root documents involved in the activity. This count previously reported the total number of documents.
- On the ACTIVITY tab of the dataset detail panel, the count now represents the number of root documents involved in scan actions. The count previously reported the total number of documents.
- For all activities and workbook actions with at least one successfully processed document, added the Root + Child Count in the agent activity side panel. This count has also been added to the work unit detail available from within the agent activity detail panel when applicable. The "succeeded count" is the root count.

In Manage, the following updates have been made,

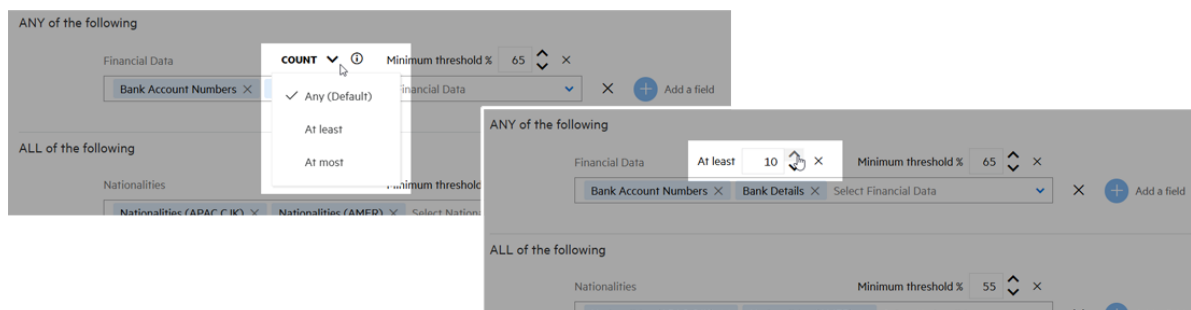
- On the ACTIVITY tab of the workbook detail panel, changed "Document Count" or "Table Count" to "Workbook Count" in the workbook pending activity and history sections. Also added "included in activity" after the "Root + Child Count" value in the history section. The **Workbook Count** represents the number of files in the workbook, regardless of the action performed. The **Root File Count** represents the number of root files included in the action. The **Root + Child Count** represents the total number of root files and children of root files included in the action. The root or child files may or may not be in the workbook but are included in the action.
- Added the ability to define a minimum or maximum number of values to identify before criteria based on grammars is matched. This option is added to the criteria when creating tags in Connect, the criteria when creating a workspace, workspace template, or dynamic query workbook in Manage, and when conducting a search of documents using the search builder in Manage and Analyze.

For each field that represents grammar types or grammar rules that are not part of a grammar type, you can define the number of values that must be identified for the document to match the criteria.

**NOTE:** For fields that represent only grammar rules that are part of a grammar type, you cannot define a number of identified values.

For example, under the Contact Data grammar class, you will see Addresses, Email Addresses, Phone Numbers, and any custom grammar rules you may have created. Addresses and Phone Numbers are grammar types that include region specific grammar rules, such as Addresses (AMER) and Phone Numbers (UK) respectively. You can define the number of values that must be matched for Addresses (grammar type), Email Addresses (grammar rule not in part of a grammar type), and Phone Numbers (grammar type) but you cannot define the number of values that must be matched for Addresses (AMER) or Phone Numbers (UK) because these are grammar rules that are part of a grammar type.

To define the number of grammar values that must be identified for the document to match the criteria, click the **COUNT** button above the grammar field that has been added and then click **Any (Default)**, **At least**, or **At most**. If you select **At least** or **At most**, type the desired number or use the up or down arrows to define the minimum or maximum number of values identified in the document in order to match the criteria. The following example selection will match documents with 10 or more Bank Account Numbers.



- When a grammar exclusion associated with a dataset has been added or edited, a re-analyze icon (🔄) and a **Re-analyze** link display next to the Grammar Sets information in the dataset detail panel. The grammar sets with the exclusion that are applied to the dataset and have been updated display in bold text.
- For spreadsheets (such as CSV and Excel files) that have had their content stored, the content in text view in Analyze and Manage now displays in a basic table format.
- The following grammar updates are included in this release.
  - Added National ID for New Zealand.

## Processing Agent

The following features and enhancements apply specifically to the OpenText Core Data Discovery & Risk Insights 25.3.101 processing agent.

- Windows Server 2025 is now supported for the processing agent host machine.
- Files with an ESD extension are no longer processed by default. ESD files are encrypted container files used during Microsoft patching and do not contain sensitive information.

## Connect

The following features and enhancements apply specifically to Connect, and are in addition to changes already mentioned in relation to general enhancements.

- When editing an unstructured dataset that includes data, you can now downgrade the analysis state. For example, if you had previously selected to store content as text or extracted grammar values, you can now disable either of these options. You will receive a confirmation message to confirm your choices before moving forward. Once you downgrade the analysis for a dataset, you cannot re-enable the same option.

These options are helpful if you no longer need to retain this additional analysis information in the Core Data Discovery & Risk Insights index but need to keep the documents associated with the dataset accessible.

- For unstructured datasets, including those based on custom adapters, you can now configure Advanced Capture Rules to refine the analysis options. Each advanced capture rule is a combination of an action (analyze, metadata, or skip) and conditions (create date, modify date, file extensions, and file size). This lets you refine document analysis on specific documents in different ways.

Once the primary capture rules are applied and the initial list of files is fetched from the source, the advanced capture rules evaluate each document fetched, one document at a time. You will rank the advanced capture rules so the first rule that is matched is applied to the document. You can also define advanced capture rules in dataset templates.

You can select one of the following actions to take when processing documents matching the filter criteria for the advanced capture rules.

- **Analyze.** Specifies to process and index the metadata and the body content of individual files that match the filter criteria. You can preview the document content in a plain text view in Analyze and Manage, but you cannot preview any attachments or embedded images.
  - **Store content as text.** Specify whether to store the contents of the individual files as text; the file itself is not stored.
    - When enabled (selected), the contents of the files are stored in the index as text.
    - When not enabled (deselected), tag values are identified but the file content cannot be viewed.

**NOTE:** Changes to grammar, tag, and workspace keyword search criteria will not be automatically updated for files that have already been analyzed. Storing content increases the size of your index.

- **Extract grammar rules.** Specify whether to extract, index, and count the values identified by the grammar rules.
  - When enabled (selected), grammar values are identified, extracted, and indexed.
  - When not enabled (deselected), grammar values are not extracted and masked

view of file content cannot be shown.

**TIP:** You can extract grammar values later for files within a workbook.

- **Metadata only.** Specifies to process and index only the metadata from individual files that match the filter criteria. You cannot preview the document content in Analyze or Manage.
- **Skip.** Specifies to skip processing for individual files matching the filter criteria.

**ADVANCED CAPTURE RULES**
LOAD FROM TEMPLATE

Rules are optional and will be executed in the specified order. The first match will be applied for a particular document.

⋮	Skip	Filter	ANY of file_ext	log	×
⋮	Metadata only	Filter	ALL of File Size	From 5 MB	×
⋮	Select action	Filter	No filters selected		×

+

Analyze
Metadata only
Skip

If you add advanced capture rules to an existing dataset that has already been scanned, the advanced capture rules are only applied to newly scanned items in the dataset.

- Added the option to authenticate to SQL Server sources using Microsoft Entra ID.  
When creating a source, select **Microsoft Entra Password** as the Authentication Type, and then type the user name of the Microsoft Entra user in the format of a valid email address (user@domain.com). User name must be an account from a Microsoft Entra ID or an account from a managed or federated domain with Microsoft Entra ID.
- When creating custom grammar rules, removed the option to upload a term list for inclusion. You can still add individual terms as desired.
- On the Manage datasets page, changed the SOURCES filter above the dataset list to multi-select so that you can filter by one or more specific sources. Previously, you could select to view datasets for either all sources or for a single dataset.
- Updated the LANGUAGES filter menu on the Manage Grammars page to better handle scrolling and display of long language names.
- [379754] Enhanced the method for identifying Microsoft Purview Information Protection labels that encrypt the protected data. Previously, documents with Microsoft Purview Information Protection labels were excluded from grammar value extraction. With this change, only documents with encryption labels are excluded from grammar value extraction.
- You can now select and resize columns on the Agent Activity list page and the Agent Activity error popup window.



## Analyze

The following features and enhancements apply specifically to Analyze, and are in addition to changes already mentioned in relation to general enhancements.

- Updated the representation of the trend data on the Analyzed Sensitive Data, Tag Analysis Trend, and Grammar Analysis Trend dashboard when there is no data for the selected timeframe. If no data exists for the selected timeframe, the trend value is null and is now represented by a dash, "-" instead of 0%. A 0% trend means that there is data for the selected time period, but there is no change compared to the previous data.

## Manage

The following features and enhancements apply specifically to Manage, and are in addition to changes already mentioned in relation to general enhancements.

- Added an option to reanalyze all documents within the workbook to extract content and reprocess the files. The original documents at the source will be reanalyzed and the "Last Analyzed" date will be updated. If a file has changed at the original source since the last analysis, the last modified date is updated as appropriate.

The reanalyze option is available in the File Analysis section of the ACTIVITY tab of the workbook detail panel.

- User must have the "Manage workbooks" permission at both the Manage and Workspace Security levels.
- When the action is in progress, the **REANALYZE** button is replaced with a CANCEL button to allow you to cancel the request.
- Reanalyze actions are included in the Audit Log in Administration and in the workspace Report and Audit in Manage.
- For new deduplication workbooks, you will be able to select *either* deduplication option: compare against master records OR within and across datasets. Prior to this release, you could select both options; there is no change to deduplication workbooks that exist prior to this release.

This change provides better clarity as to the process (option) that identified the duplicate.

- Reordered the configuration options in the deduplication workbook wizard. This change provides better flow in conjunction with the change to allow a single deduplication option.
- When viewing the document detail panel from the context of a deduplication workbook content list, you can now see the document IDs for all the master documents that the selected document is a duplicate of.
- Updated the filter menus on the dataset selection page of the workspace and workspace template wizards to better handle scrolling and display of long language names.

## Resolved issues for the application

The following issues have been resolved in this release of the OpenText Core Data Discovery & Risk Insights application.

- Resolved an issue where the progress bar percentage was incorrect on the workspace activity chart when collecting items within containers.
- [362885] Resolved an issue where the phrase "contact number" in context with an Australian phone number did not result in the identification of the phone number.
- Resolved an issue where, in specific scenarios, the content of a protected document was viewable from the context of the workbook.
- Resolved an issue where part of the context used to identify a phone number was included in the grammar value. This occurred when part of the context included brackets, such as (s).
- [395674] Resolved an issue where the content preview was not viewable for a specific document.
- Resolved an issue where the trend percentage value on the Analyze Sensitive Data dashboard was sometimes incorrect.

## Resolved issues for the processing agent

The following issues were resolved in this release of the OpenText Core Data Discovery & Risk Insights processing agent.

- Resolved an issue where a reanalyze action reported errors for documents marked as missing. These documents are now correctly skipped during processing.
- Resolved an issue where documents were not properly Sent to Target/Send Masked due to a long file name or title.
- Resolved an issue where an activity to send a large number of file system documents to a Documentum target was taking a longer time than expected.
- Resolved an issue where an activity to send a document with 0 byte size failed to send to a Google Drive target.
- Resolved an issue where a protect action failed on a file with a long path. The warning has been updated to inform the user prior to the action beginning.
- Resolved an issue where processing documents with the backtick special character failed for datasets configured to include dynamic external metadata processing.
- Resolved an issue where all items for an Extended ECM dataset generated individual issues in the audit details when the Displayable property for the OTOBJECTUPDATE region in Extended ECM is disabled. With this resolution, multiple identical issues result in processing being stopped.

## Known issues

The following issues are present in this release of OpenText Core Data Discovery & Risk Insights.

- None

# Documentation

OpenText Core Data Discovery & Risk Insights includes a single Help Center that is incorporated into each User Interface and is updated with each software release as appropriate.

To view the OpenText Core Data Discovery documentation outside of the product, see the documentation pages.

## **To navigate to the OpenText Core Data Discovery & Risk Insights documentation**

1. From a web browser, navigate to [www.microfocus.com/documentation/file-analysis-suite/](http://www.microfocus.com/documentation/file-analysis-suite/).
2. On the OpenText Core Data Discovery & Risk Insights Documentation page, select the desired release version.

You must have Adobe® Reader installed to view files in PDF format (\*.pdf). To download Adobe Reader, go to the [Adobe](http://adobe.com) web site.