



# OpenText Core Data Discovery & Risk Insights

Application Version 25.4.0

Processing Agent Version 25.4.100

## Release Notes

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# OpenText Core Data Discovery & Risk Insights Release Notes

**Application version:** 25.4.0

**Processing Agent version:** 25.4.100

**Publication date:** January 2026

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 25.4.0 and Processing Agent 25.4.100. 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 Beyond this grace period, out of date agents will be automatically disconnected and an upgrade will be mandatory to reconnect and process data.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 25.4.0.


- Added user-level notifications for various workspace and workbook activities. You can now see on-screen notifications from all areas of the UI and receive optional email notifications for the following scenarios.
  - You have been directly assigned a role in a workspace.
  - A group you belong to has been assigned a role in a workspace.
  - You have been directly assigned as a reviewer of a workbook activity.
  - A group you belong to has been assigned as a reviewer of a workbook activity.
  - The workbook review you requested has been approved or rejected.

From any page in the UI, click the notification icon  to open the notification pane. Each notification is an individual card. Click the name of the workspace to go to the overview view of the workspace. Click the name of the workbook to go to the list of workbooks within the parent workspace. The UI checks for new notifications every 60 seconds. If the pane is open, new notifications appear at the top automatically.

You can see individual notification cards for a maximum of 30 days from the date the notification became active. You can also manually remove one or more notifications from the pane as you desire.

Prior to email notifications being sent, you must verify your email. From the notification pane, you can request a verification be sent or your admin can request for you. You can configure your notifications to opt out of receiving one or more of the email notifications; you cannot opt out of on-screen notifications. After your email is verified and you begin receiving notifications, you can click the name of the workspace or workbook and go directly to the workspace or workbook (if you are not logged in, you will need to log in first).

- Added a folder tree view pane to Analyze and Manage. The folder tree pane lets you view data for file system, SharePoint, OneDrive, or Extended ECM sources from the context of the original folder structure of datasets associated with the source. The folder tree pane can be viewed in place of the filter pane. To toggle between the two panes, click the folder tree icon  or the filter icon  located in the action menu.
- Added an option to enable OpenText Aviator to assist in getting the answers you need without leaving the application. Aviator responses are derived from content within the Help Center.

If enabled, click the Aviator icon  from any page in the UI. You can click one of the suggested prompts based on your current location in the UI or type your own question.

- The following grammar updates are included in this release.
  - New Japanese ID entities are now provided for the `national_id_cjkt.ecr` grammar, for personal number, Zairyu card, and Juki card. These entities provide separate matches for the previously available Japanese national IDs. They are not available in the combined grammar.
  - The National ID entity for South Africa now matches national IDs that are formatted as groups of digits (6+4+3), separated by space or dash characters.
  - The definition for the Chinese banking entity has been improved so that mixed delimiters are no longer allowed.
  - The passport entities for Canada and USA have been updated to reflect changes to their respective passport number formats.
  - The PII medical grammar drugs entities have been updated to improve coverage.

## Processing Agent

The following features and enhancements apply specifically to the OpenText Core Data Discovery & Risk Insights 25.4.100 processing agent.

- Created a plug-in to allow you to manipulate allowed document-related fields in the index. Sample files are installed to `C:\ProgramData\OpenText\Core Data Discovery & Risk Insights\Agent\Plugins` on the agent host.

## Connect

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

- When creating Exchange and Google Drive datasets, you can now define multiple mailboxes (Exchange) or accounts (SharePoint, Google Drive). All mailboxes or accounts associated with the dataset are processing in the same manner.

**NOTE:** These mailboxes and accounts do not need to be added to OpenText Core Data Discovery & Risk Insights as users.

- For Exchange datasets, add one or more mailboxes in the format of a valid email address. You can define a maximum of 500 mailboxes per dataset.
- For Google Drive datasets, select to process **User Drives** and then define one or more user access account addresses. You can define a maximum of 500 accounts per dataset.
- When creating a SharePoint or SharePoint Online (O365) dataset, you can now define document libraries. The sub-URL must reflect the direct location of the document library.

- Added support for processing data from OneDrive Online (O365). Additionally, when creating a OneDrive source, you will select whether the source is for OneDrive (for Business) or OneDrive Online (O365). Previously, OneDrive for Business (on-premises) sources could be created by selecting the SharePoint source type.
  - For OneDrive datasets, add one or more site names using the format appropriate for the user profile service application settings. You can define a maximum of 500 site names per dataset.
  - For OneDrive Online (O365) datasets, add a User Principal Names (UPN) for each drive to be scanned. You can define a maximum of 500 UPNs per dataset.
- Improved the view of agent activity to include individual accounts. If the activity spans accounts, expand the activity to view information about the individual datasets (already existed) or accounts (new) involved in the activity. The list of datasets/accounts is now scrollable.
- For newly created datasets, you can now immediately scan the dataset. Previously, you could not click the scan button until after the dataset finished initializing. You no longer have to wait for initialization to complete to click the button and the scan will begin when the initialization completes.

## Manage

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

- The new Inventory page in Manage shows you the managed data from file system, Extended ECM, SharePoint, and OneDrive sources to which you have access. You can see how the data was organized (folder structure) on the original data source. Access to documents in Inventory is managed by datasets as is the case for all other views.

Use the **Managed data** tab to view the content you have access to. Use the **My data** tab to view your own data from file system sources, as defined by document security groups. From either tab, expand the sources and folder structures to see the status of associated managed workspaces. If enabled, you can organize the content from a selected source or folder into a workspace for further review.

Workspaces created from Inventory are based on workspace templates. When creating a workspace template, select the check box for the new "Available in Inventory View" option to allow the template to be selected for a workspace created from Inventory. When this option is selected, the template is also available when creating a workspace from outside of Inventory.

Permissions have been added in Administration to support Inventory.

- The new "Create/Edit workspaces in Inventory view" permission allows you to create workspaces from Inventory and edit workspaces that were created in Inventory. This permission is set at the Manage application level in Administration but is not assigned to roles by default.
- The new "View 'Managed data' on Inventory page" permission allows you to see the **Managed data** tab. This permission is set at the Manage application level in Administration but is not assigned to roles by default. You must also be assigned to roles or groups with the

"Manage workspaces" permission.

- The new "View 'My data' on Inventory page" permission allows you to see the **My data** tab. This permission is set at the Manage application level in Administration but is not assigned to roles by default. You must also be assigned to roles or groups with the "Search and view documents/tables" or "Manage workspaces" permission and be assigned to document security groups that represent security groups at the original source location.

If you do not have either the "View 'Managed data' on Inventory page" or "View 'My data' on Inventory page" permission, the Inventory page will not display for you.

- Added a simplified workspace view to Manage that provides a focused view of workspaces and data to which you have access. You are able to perform a subset of the actions available in the standard workspace view.

In the simplified workspace view, you are able to view the basic details of workspaces and workbooks. When viewing the contents within the context of a workspace or workbook, you can use the folder view pane to view contents in their original source folder structure.

Permissions have been added in Administration to support the simplified view.

- The new "Simplified workspaces view" permission provides a limited to focus on workspace tasks. When assigned this permission, you cannot view the individual workspace overview nor can you create workspaces. This permission is set at the Manage application level in Administration but is not assigned to roles by default.
- The ability to perform file analysis has been removed from the "Manage workbooks" permission at both the Manage application and Workspace Security levels. A new permission, "Perform file analysis" has been created for this purpose to allow for more focused control. This permission has been added to the "Workspace Manager" and "Document reviewer" default roles at the application level and to the "Manage" and "Full Control" roles at the Workspace Security level. For environments upgrading to this release, the "Perform file analysis" permission will be assigned to existing roles that included the "Manage workbooks" role.
- Added fields to the workspace template wizard to support new features.
  - On the General page, **Available in Inventory View** specifies whether the template will be available when creating workspaces from the context of Inventory View. The name of the template displays in the "Manage this location" list in the detail panel of the Inventory List page.
  - On the Default Security page, **Workspace Owner** defines the owner of workspaces based on the template.
  - On the Default Security page, **Role for Groups associated with a folder selected in the Inventory view** defines the role assigned to document security group members. When viewing a folder in Inventory view, these members have access to the folder within the original source location the workspace was created from.

**NOTE:** The views and actions available to the logged in user may also be limited by additional roles assigned.

**Limits:** Enabled only when Available in Inventory View was selected in the General options.

## API updates

The following updates have been made to the OpenText Core Data Discovery & Risk Insights APIs.

- Due to the updates to support multiple Google Drive drives in a dataset, the response data for the following method has changed.

POST /ajp/v1/job

- The `accessaccount` property has been updated to `accessaccounts`.

- The following APIs have been added to support grouped agent job runs.

GET /ajp/v1/jobrun-group

PUT /ajp/v1/jobrun-group/{jobRunGroupId}/cancel

POST /ajp/v1/jobrun-group/facets

POST /ajp/v1/jobrun-group/search

For more information about these methods, see the descriptions in Swagger UI.

## 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 Content Manager incorrectly returned a 500 http status when the file trying to be read does not exist. This was resolved with the support of Content Manager 25.3.0.
- For the Tag Analysis Trend and Grammar Analysis Trend dashboards in Analyze, resolved an issue where non-sensitive tag reporting groups were incorrectly included in the reporting group dropdown filter list and in the data for non-sensitive reporting groups was incorrectly included in the charts.
- Resolved an issue where documents with Microsoft Purview Information Protection classification labels were incorrectly treated as encryption labels and the document content was therefore treated as protected and not viewable in the UI.
- Resolved an issue where the UI did not warn for about unsupported characters for the **Limit by file extension** options for dataset Primary Capture Rules. These fields support only alphanumeric characters and \_ - & # + = ^ \$ ~ @ special characters.
- [414469] Resolved an issue where, in certain scenarios, the option to save a list of documents was dimmed and therefore not available. This typically occurred when viewing a list of documents based on a search using the search builder.
- Resolved an issue where, for a user with access to all datasets, the Reporting Groups (Estimated) and the Top Weighted Labels (Estimated) charts on the Estimated Sensitive Data dashboard in Analyze did not show any data.
- [415020] Resolved an issue where counts were incorrectly reported for Source Cloud and Structured Data in the Usage Overview dashboard in Administration for a scan of metadata-only documents. In this scenario, the counts should be reported for Metadata-only.
- Resolved an issue where a single quote included in a Lua script pattern for defining grammar exclusions did not return the expected results. The issue was related to whether a standard single quote or a smart single quote was used. The type of single quote used no longer matters.
- [03201257] Resolved an issue where some fields in the new workspace wizard were still prepopulated from the last workspace that was created based on a workspace template, even when the workspace template field was cleared.
- Resolved an issue where the "Workspace Owner" was not properly pre-populated for workspaces based on templates with this option defined.
- [03220927] For a workspace that includes a file system dataset, resolved an issue where incorrect case in the defined file path resulted in the documents not being added to the workspace.
- [420932] Resolved an issue where the "Last Refreshed" date on a workspace was being updated for changes other than a refresh action.

- When using the filter panel to filter for documents with an attachment, resolved an issue where the "Has Attachment" field in the detail panel for a selected document had an incorrect value of "No".
- Resolved an issue where, in certain scenarios, the Agent Activity would show as Processing but the activity being run by the agent had failed.
- The following issues for grammar are included in this release.
  - Resolved an issue where speculative city name matching for Japanese addresses could incorrectly overrun into prefectures, preventing valid matches.

## Resolved issues for the processing agent

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

- [412027, 412904] Resolved an issue where file analysis jobs were not completing in a timely manner.
- Resolved an issue where reanalysis of a Google Drive dataset did not check for items removed from the original Google Drive location.
- Resolved an issue where duplicate folder names could be created when sending to a Google Drive target. While Google Drive allows duplicate folders names, this resolution prevents creating duplicate folder names when sending documents to a Google Drive target.
- Resolved an issue where certain Extended ECM documents were failing and the error message in the log was incorrect. The incorrect message indicated that the "URL\_PATH should begin with / and should not end with /." The error message for these specific documents has been corrected to indicate that the failure was due to a permission issue for the document's parent folder.
- [418747] Resolved an issue where, when processing an Extended ECM dataset, processing stopped when an unsupported folder type was encountered. The processing now reports the error and then continues with the processing job as expected.
- [418976] Resolved an issue where a scan of a specific Extended ECM dataset node returned the error, "Failed to get items from xECM".
- [419034] Resolved an issue where a failed download of an Extended ECM or Documentum file was retried an excessive number of times. Reduced the number of times the failed download is retried.
- Resolved an issue where a scan of an Extended ECM folder with a large number of subfolders did not recognize when the scan had completed.

## Known issues

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

- If you remain idle on pages with *auto-refresh* (such as Workbooks, Agent Activity, or Manage Datasets), and your session times out, you may see an “Authentication Error” message instead of the expected “Session Timed Out” message.

# 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.