



# OpenText Core Data Discovery & Risk Insights

Application Version 26.2.0

Processing Agent Version 26.2.100

## Release Notes

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# OpenText Core Data Discovery & Risk Insights Release Notes

**Application version:** 26.2.0

**Processing Agent version:** 26.2.100

**Publication date:** May 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 26.2.0 and Processing Agent 26.2.100. 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 Beyond this grace period, out of date agents will be automatically disconnected and an upgrade will be mandatory to reconnect and process data.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 26.2.0.

- Added support for processing items from Confluence 7.19.x or later Data Centers. You can connect to Confluence using a configured user or an API token and then define the Confluence space using the space key. You can define a maximum of 500 unique spaces for a given dataset. However, an individual space can be defined for only one dataset per Confluence source.

When viewing a content list in Analyze or Manage , Confluence items can be reviewed in the folder tree view.

Deletions of and updates to managed Confluence items are tracked in Core Data Discovery & Risk Insights. This is accomplished at the time of a scan by comparing what is present at the Confluence dataset path to what has already been processed.

- Added the ability to mask file system and SharePoint documents at their original source location. This method replaces the original documents, at the source location, with masked versions in the original file format. Masking at the source location is referred to as **internal masking**. When applied from the workbook Protect action, masking is based on existing grammar types or rules for which masking is configured and selected as part of the file protection rule.

**CAUTION:** This is an irreversible action that overwrites the document in the original source location. To ensure you have a backup, perform a send to target action against the workbook before masking the documents at the source.


A single **Internal Masking** file protection system is automatically created when your application was installed and cannot be edited or deleted. You need to create file protection rules to select the grammars for which you want to mask documents at their source.

When creating a workspace or workspace template with the Protect feature selected, you will now select the file protection rules that will be available when you request file protection for documents in an associated workbook. When you select the Protect file action for a workbook, you can now select an individual rule (internal masking or Microsoft Purview) to be applied. Before the protection is applied, you are presented with a summary of the number of documents that will be protected, if any.

The following changes have been made to support internal masking.

- Added the ability for a user to perform internal masking to the existing **Protect documents** permission at the Manage application level and Manage workspace security level.

- Added **Mask at source** to the agent activity page in Connect.
- The **Microsoft data protection** file protection type has been renamed to **Microsoft Purview labeling**.
- The following grammar updates are included in this release.
  - As part of the Australian Privacy Principles grammar set > Government ID grammar rule, the Australian Company Number (ACN) will no longer match as a Social Security Taxation ID. The ACN is considered public information.

To take advantage of this change, you need to re-analyze the datasets that use this grammar rule. In Connect, navigate to Sources > Manage Datasets, select the appropriate dataset, and open the detail pane. For datasets that include an updated grammar, click the re-analyze icon () or the **Re-Analyze** link next to the Grammar Sets information.
  - Added the following grammars.
    - Addresses: India, Oman and UAE
    - Date of Birth: Arabic and Hindi languages
    - Driving Licenses: Oman and UAE
    - Health ID: Norway, Oman and UAE
    - Medical Terms: Arabic and Hindi languages
    - Names: Oman and UAE
    - National ID: Oman
    - Nationalities: India, Oman and UAE
    - Passport Numbers: Oman and UAE
    - Telephone Numbers: India, Oman and UAE

## 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 the default action for a dataset from "metadata only" to "analyzed", you can now enable "Store content as text" and "Extract grammar values". Previously, these options were not available when updating the default action to "analyzed".
- The RETRY functionality for agent activity scans with a status of "completed with errors" and "completed with ingestion errors" has changed for scans that have multiple job runs. For previous releases, you had to expand the parent scan activity (those with >) and retry each individual job run. With this change, the retry function has moved to the top-level scan activity and the RETRY action has been removed from the individual job runs.

For single job run scan activities, there is no change and RETRY is available as before.
- For Content Manager datasets, you can now select to capture external metadata dynamically

using the external metadata file processor. For more information about capturing external metadata, see "Process external metadata" in the Help Center.

## Manage

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

- When viewing the Workspace Overview dashboard, your view is determined by your overall permissions and your workspace-level access. You will no longer see cards with a zero (0) count for workspaces you do not have access to. These cards are now hidden.

## Administration

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

- Users with the "User Management" permission in the Administration UI can now remove themselves from application-level roles as long as the role does not remove their "User Management" permission.

## API updates

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

- If you are performing a **protect** action against any of the following methods, you are now required to link the `secureRuleId` property in the payload to the workspace.

```
POST /ca/v1/workspace/{workspaceId}/policy/approve-without-review/{entityId}
```

```
POST /ca/v1/workspace/{workspaceId}/policy/request-review/{entityId}/reviewer/{reviewerId}
```

```
POST /ca/v1/workspace/{workspaceId}/policy/approve/{entityId}
```

## Resolved issues for the application

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

- Removed the "Back to Application" link from the email verification page.
- Resolved an issue where there was discrepancy with the "Prepare for Delete" and "Delete" count and status for workbook delete actions.
- [422418] Resolved an issue where the user displayed as initiating a manual refresh of a workbook was not correct. This could be seen in the Activity view of the individual workspace view.
- [422197] Resolved an issue where SharePoint datasets associated with the same source did not advance through initialization state. This occurred when one dataset did not include a Sub-URL and was subsequently deleted. The other datasets associated with the same source could not be initialized.
- Resolved an issue where grammar rules could not be edited as expected within dynamic tags created before release 25.3.0.
- Resolved an issue where a send to target action across multiple agent clusters resulted in incorrect counts reported in the agent activity detail pane.
- Resolved an issue where the content of spreadsheets did not display properly in the content view pane.
- Resolved an issue where, in specific scenarios, when you scroll to the end of the currently displayed agent activity list you would see a message that there is no agent activity to display.
- [426335] Resolved an issue where a dataset scan was not triggered according to its defined schedule.
- [426770] Resolved an issue where the CANCEL button for a workbook action was disabled even though the user had the correct permissions.

## Resolved issues for the processing agent

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

- [426540] Resolved an issue where the grammar values were not properly extracted from tables in Word documents.
- Resolved an issue where an "Item did not exist" error occurred during ingestion. This error is now prevented by better handling scenarios when Exchange Online provides incorrect information.
- Resolved an issue where documents without content stored may have their content stored when a send to target action is initiated.
- Resolved an issue where a scan of an Exchange dataset failed with the error "Credentials are invalid or unauthorized" even though the credentials are valid.
- [426025] Resolved an issue where processing of SharePoint online datasets was not being picked up by the agent and therefore scanning failed to start. The agent now properly reports the problem instead of silently losing the work unit.
- [426542] Resolved an issue where, in a specific scenario, the tenant ID and path information within a document's external ID was not obfuscated in the error log.
- [425221] Resolved an issue where a failed scan of a SharePoint dataset with a status of "Forbidden" was continually retried. Failed scans with a status of "Forbidden" are no longer automatically retried.
- Resolved an issue where a SharePoint Online scan resulted in an ingestion error with the message that the list view threshold was exceeded.
- [426715] Resolved an issue where a delete action failed for all documents instead of only for the documents with paths that exceed the path length limit.
- Resolved an issue where sending to Sharepoint online target was inconsistently failing with the error "The property or field 'LocaleId' has not been initialized".
- Resolved an error that occurred during content extraction for rescans that detected modified documents.

## 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.