myInsight for Documentum

Cloud Deployment Guide

AMEXIO

Contents

1. Version History

Date	Changes	Version number
26-March-2021	First version of the myInsight Cloud Deployment Guide	1.0
30-March-2023	Update for myInsight 8.0.	1.1
22-September-2023	Update for myInsight 8.1.	1.2
25-February-2025	Update for myInsight 9.0.	1.3

2. Product Description

With myInsight for Documentum, end-users can request reports from predefined report definitions. They can see the reports displayed on their computer screen or receive reports automatically in their e-mail or at a specified location inside or outside the Documentum repository. The preferred format can be chosen by the end-user, without the end-user needing any knowledge about DQL, HTML or XSL.

myInsight for Documentum categorizes functionalities according to the user's role in the report generator. There are 3 predefined roles:

- Users in the *Report User* role, which supplies predefined reports from the system, require no knowledge of either DQL or style sheets.
- Users in the *Report Administrator* role can schedule reports so that they are generated automatically at a predefined time and location.
- Users in the *Report Builder* role can define new report specifications by configuring the DQL statements, and they can identify and compose the desired style sheets.

myInsight for Documentum can be accessed by anyone who has been given one of these default roles.

myInsight for Documentum can produce output in any format that can be generated using XSL style sheets. For example: reports can be presented in PDF, HTML, text file, Microsoft Excel spread sheet or Microsoft Word format. myInsight for Documentum can also e-mail the output file automatically. In this case the recipient does not need to be a Documentum user and can even be someone from outside the organisation.

myInsight for Documentum is integrated into Documentum Webtop, Documentum Administrator, Documentum D2 Classic, Documentum Smart View and Documentum xCP, in line with the corporate philosophy of Documentum. This enables end users to work in an environment that they are already familiar with. Due to its full integration within the Documentum environment, no additional components need to be installed on the end user's local machine.

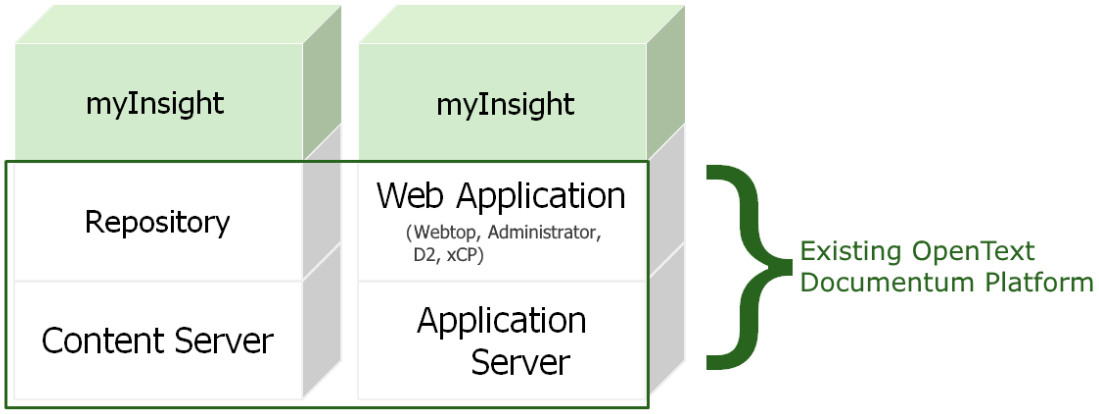

Figure 1: myInsight integration into the OpenText Documentum platform

As shown in the previous figure, myInsight for Documentum components are located on both Repository level as Web Application Level. Both use standard OpenText | Documentum subcomponents for its functionality.

As of version 7.0, myInsight for Documentum can be installed separate from the Content Server.

In December 2015 euroscript has been renamed to Amplexor. The product euroscript Documentum Report Generator has been renamed to myInsight for Documentum. In 2020, Amplexor joined the Acolad Group under the name Acolad Digital. In October 2023, Acolad Digital became AmeXio.

For the reader's convenience, the abbreviation 'myInsight' will be used in this document, instead of the full product title 'myInsight for Documentum'.

2.1. Document Description

This document is intended for System Administrators who are installing or upgrading myInsight on a Kubernetes cloud environment.

Installing myInsight using Kubernetes is supported on Documentum D2 cloud installations which were installed using the Kubernetes Helm charts provided by OpenText.

All cloud providers supported for Documentum D2 by OpentText are also supported for myInsight.

The myInsight Kubernetes Helm charts and scripts are similar to the ones from OpenText.

3. Deploying myInsight in a Kubernetes environment for Documentum versions 20.4 up to 22.1

3.1. Planning the installation

Consider the following when deploying myInsight in the cloud.

> **Note** When myInsight is added to an already running environment the Documentum pods will be restarted.

3.2. Requirements

- myInsight must be installed in the same namespace as Documentum D2.
- myInsight needs one ReadWriteMany Persistent Volume in addition to the ones already required by Documentum. Default size for the PV is 1 Gi. This PV needs to be available before installation.
- The myInsight-installer Docker image which can be downloaded from the website must be available in a local registry.

3.3. Deploying myInsight-installer pod

> **Note** The license file is required the first time you install myInsight but can be omitted on upgrades.

1. Extract the myInsight HelmCharts tar.
2. Modify the values.yaml
   - Update the repository key with the location of the Docker repository you are using.
   - Update the storageClass key with the storage class that should be used for the PV.
   - To install a myInsight license set the import value to true and specify the copy the content of the content of the license file to the licenseKey.

```
license:
  import: true
  licenseKey: | <base64 encoded content of the license file>
```

3. Deploy the helm chart using the following command.

```
helm -n <namespace used for D2> install myInsight-installer
```

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

3.4. Configure Documentum to include myInsight

1. Update the d2/values.yaml from the D2 Helm charts used to deploy D2

- Change the value of content-server.customer.scriptExecute to true

```
### Custom Script Execution ###
custom:
  scriptExecute: true
```

- Change the value of d2client.custom.scriptinPV to true
- Change the value of d2.client.custom.markerFiles to include "myInsight-installercopy-succeeded-9.0"

```
custom:
  scriptinPVC: true
  scriptPVCname: d2client-shared-pvc
    PVCSubPath: customscripts
    ### Provide the marker file names of client products in
 any order separated by comma. Before CS copying the custom
 scripts, these marker files presence are verified.
    # e.g. markerFiles: CustomApp1-installer-copy-succeeded-1
    markerFiles: myInsight-installercopy-succeeded-9.0
```

- Add the extra myInsight path to the d2ingress configuration

```
d2ingress:
  enabled: true

  ingress:
    hostShortName:d2-ingress
    hostDomainName: *ingress_domain
    proxyBodySize: 8m
    proxyConnectTimeout: 300
    proxySendTimeout: 300
    proxyReadTimeout: 300

  # List of valid values are CFCR, Azure, AWS, GCP
  cloudPlatform: CFCR

  extraPaths:
    - backend:
```

```
      serviceName: d2client
      servicePort: 8080
    path: /myInsight
```

2. Update the d2/dockerimages-values.yaml from the D2 Helm charts used to deploy D2
   - Change the value of content-server.customer.markerFiles to include "myInsight-installercopy-succeeded-9.0"

```
custom:
  versions: d2.20.4.0000.0240
### Provide the marker file names of client products in
 any order separated by comma. Before CS copying the custom
 scripts, these marker files presence are verified.
markerFiles: d2-copy-succeeded-20.4.0000.0240,myInsight-
installercopy-succeeded-9.0
```

3. Run the helm command to install or upgrade the D2 deployment. Refer to the OpenText documentation for more information.

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4. Deploying myInsight in a Kubernetes environment for Documentum versions 22.4 and newer

4.1. Planning the installation

Consider the following when deploying myInsight in the cloud.

Note When myInsight is added to an already running environment the Documentum pods will be restarted.

4.2. Requirements

- myInsight must be installed in the same namespace as Documentum D2.
- The myInsight-installer Docker image which can be downloaded from the website must be available in a local registry.
- When myInsight-server is installed 3 additional Persistent Volumes are required. One ReadWriteMany volume is used to temporarily store the reports that are not saved to the repository. Two ReadWriteOnce volumes are created for each instance to store the logs and the d2rest files.

4.3. Including myInsight for the content server

This is a required component.

1. Add a file named myinsight-secrets.yaml to the templates directory.

- Fill it with the following contents:

```
apiVersion: v1
kind: Secret
metadata:
  name: myinsight-secret
type: Opaque
data:
  myInsightLicense: <base64 encoded content of the license
 file>
```

- Replace the text **<base64 encoded content of the license file>** with the base64 encoded content of the license file.

2. Edit the dockerimages-values.yaml file from the Documentum helm charts.

- Add the following block to dctm-server.content-server.extraInitContainers:

```
- name: myinsight-installer-init
  image: <docker_repo>/myinsight-installer:9.0
  imagePullPolicy: Always
  command: [ '/bin/sh', '-c', '/myinsight-copy.sh' ]
  env:
    - name: TARGET_APP
      value: "dctm-server"
    - name: CABINET
      value: "myInsight"
    - name: REPORT_PACKAGES_CS
      value:
    - name: IMPORT_LICENSE
      value: "true"
    - name: MYINSIGHT_LICENSE
      valueFrom:
        secretKeyRef:
          name: myinsight-secret
          key: myInsightLicense
  volumeMounts:
    - name: dcs-data-pvc
      mountPath: /opt/dctm_docker/customscriptpvc
      subPath: initcontainercustomscripts/dcs-pg
```

- Replace the **<docker_repo>** text with the docker registry where you uploaded the myInsight-installer image.
- If you want to automatically install a report package you can specify the full path to that report package as the value of the REPORT_PACKAGES_CS env variable. This report package must already be available on the first content server pod.

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4.4. Including myInsight for D2-Classic / Classic View

This component is required when you want to integrate myInsight with D2-Classic / Classic View and to be able to manage the report definitions.

1. Edit the dockerimages-values.yaml file from the Documentum helm charts.

- Add the following block to d2classic.extraInitContainers:

```
- name: myinsight-installer-init
  image: <docker_repo>/myinsight-installer:9.0
  imagePullPolicy: Always
  command: [ '/bin/sh', '-c', '/myinsight-copy.sh' ]
  env:
```

```
  - name: TARGET_APP
    value: "d2classic"
  - name: CABINET
    value: "myInsight"
  - name: REPORT_PACKAGES_AS
    value:
  - name: WIDGET_LOGFILE
    value: "/opt/tomcat/logs/myInsight.log"
  - name: WIDGET_LOGLEVEL
    value: "WARNING"
  volumeMounts:
  - name: customconfig
    mountPath: /opt/D2-install/custom
    subPath: d2classic
```

- Replace the **<docker_repo>** text with the docker registry where you uploaded the myInsight-installer image.
- If you want to automatically install a report package you can specify the full path to that report package as the value of the REPORT_PACKAGES_AS env variable. This report package must already be available on all the d2classic pods.

2. Edit the values.yaml file (for Documentum 22.4 to 23.4) or config/configuration.yaml (for Documentum 24.2 and newer).

- Change the value of d2classic.customConfigurations.custom to true.
- Change the value of d2classic.customConfigurations.hook_approach to true.
- Change the value of d2classic.customConfigurations.createPVC to true.

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4.5. Including myInsight for D2-Smart View / Smart View

This component is required when you want to integrate myInsight with D2-Smart View / Smart View.

1. Edit the dockerimages-values.yaml file from the Documentum helm charts.

- Add the following block to d2smartview.extraInitContainers:

```
- name: myinsight-installer-init
  image: <docker_repo>/myinsight-installer:9.0
  imagePullPolicy: Always
  command: [ '/bin/sh', '-c', '/myinsight-copy.sh' ]
  env:
    - name: TARGET_APP
      value: "d2smartview"
    - name: REPORT_PACKAGES_AS
      value:
  volumeMounts:
```

```
    - name: customconfig
      mountPath: /opt/D2-install/custom
      subPath: d2smartview
```

- Replace the **<docker_repo>** text with the docker registry where you uploaded the myInsight-installer image.
- If you want to automatically install a report package you can specify the full path to that report package as the value of the REPORT_PACKAGES_AS env variable. This report package must already be available on all the d2smartview pods.

2. Edit the values.yaml file (for Documentum 22.4 to 23.4) or config/configuration.yaml (for Documentum 24.2 and newer).
   - Change the value of d2smartview.customConfigurations.custom to true.
   - Change the value of d2smartview.customConfigurations.hook_approach to true.
   - Change the value of d2smartview.customConfigurations.createPVC to true.
3. For Documentum 22.4 to 23.4: Add a file named rest-api-runtime.properties to the folder charts/d2smartview/configFileOverrideFiles with the following content:

```
rest.extension.message.packages =
 com.amplexor.myinsight.dctmrest.messages
```

4. For Documentum 24.2 and newer: Edit the dockerimages-values.yaml file from the Documentum helm charts.
   - Add the following block to d2smartview:

```
restApiRuntime:
  rest_api_runtime_properties: |-
    rest.extension.message.packages =
 com.amplexor.myinsight.dctmrest.messages
```

Warning Make sure that properties split by an '=' end up in the same line.

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4.6. Including myInsight for D2-Config / Client Configuration

This component is required when you want to integrate myInsight with D2-Smart View / Smart View.

1. Edit the dockerimages-values.yaml file from the Documentum helm charts.
   - Add the following block to d2config.extraInitContainers:

```
- name: myinsight-installer-init
  image: <docker_repo>/myinsight-installer:9.0
```

```
  imagePullPolicy: Always
  command: [ '/bin/sh', '-c', '/myinsight-copy.sh' ]
  env:
    - name: TARGET_APP
      value: "d2config"
  volumeMounts:
    - name: customconfig
      mountPath: /opt/D2-install/custom
      subPath: d2config
```

- Replace the **<docker_repo>** text with the docker registry where you uploaded the myInsight-installer image.

2. Edit the values.yaml file (for Documentum 22.4 to 23.4) or config/configuration.yaml (for Documentum 24.2 and newer).
   - Change the value of d2config.customConfigurations.custom to true.
   - Change the value of d2config.customConfigurations.hook_approach to true.
   - Change the value of d2config.customConfigurations.createPVC to true.
   - Add "- myInsight-D2-Config.jar" to the d2config.customConfiguration.plugins list.

     Example:

```
plugins:
  - myInsight-D2-Config.jar
```

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4.7. Including myInsight for D2-REST

This component is required when you want to integrate myInsight with D2-REST.

1. Edit the dockerimages-values.yaml file from the Documentum helm charts.
   - Add the following block to d2rest.extraInitContainers:

```
- name: myinsight-installer-init
  image: <docker_repo>/myinsight-installer:9.0
  imagePullPolicy: Always
  command: [ '/bin/sh', '-c', '/myinsight-copy.sh' ]
  env:
    - name: TARGET_APP
      value: "d2rest"
    - name: REPORT_PACKAGES_AS
      value:
  volumeMounts:
    - name: customconfig
      mountPath: /opt/D2-install/custom
      subPath: d2rest
```

- Replace the **<docker_repo>** text with the docker registry where you uploaded the myInsight-installer image.
- If you want to automatically install a report package you can specify the full path to that report package as the value of the REPORT_PACKAGES_AS env variable. This report package must already be available on all the d2rest pods.

2. Edit the values.yaml file (for Documentum 22.4 to 23.4) or config/configuration.yaml (for Documentum 24.2 and newer).
   - Change the value of d2rest.customConfigurations.custom to true.
   - Change the value of d2rest.customConfigurations.hook_approach to true.
   - Change the value of d2rest.customConfigurations.createPVC to true.
3. For Documentum 22.4 to 23.4: Add a file named rest-api-runtime.properties to the folder charts/d2rest/configFileOverrideFiles with the following content:

```
rest.extension.message.packages =
 com.amplexor.myinsight.dctmrest.messages
```

4. For Documentum 24.2 and newer: Edit the dockerimages-values.yaml file from the Documentum helm charts.
   - Add the following block to d2rest:

```
restApiRuntime:
  rest_api_runtime_properties: |-
    rest.extension.message.packages =
 com.amplexor.myinsight.dctmrest.messages
```

Warning Make sure that properties split by an '=' end up in the same line.

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4.8. Deploy myInsight Server

This component is required when you want to generate the reports on separate servers (this removes load from the Java Method Server).

1. Copy the myinsight-server folder from the myInsight HelmCharts tar to the charts folder of the Documentum helm charts.
2. Edit the dockerimages-values.yaml file from the Documentum helm charts.
   - Add the following block to the end of the file:

```
myinsight-server:
  images:
    repository: *docker_repo
```

```
    name : *appserverImageName
    tag : *appserverImageTag
    pullPolicy: *pull_policy_type
    pullSecrets: *pull_secret_name
  extensionImage:
    repository: *docker_repo
    name : <documentum_rest_image>
    tag : <documentum_version>
    pullPolicy: *pull_policy_type
  myInsightImage:
    repository: *docker_repo
    name : myinsight-installer
    tag : 9.0
    pullPolicy: *pull_policy_type
```

- Replace the **<documentum_rest_image>** text with the name of the Documentum client rest image. Depending on the Documentum version this can be dctm-d2cp-rest, dctm-d2pp-rest or ot-dctm-client-rest.
- Replace the **<documentum_version>** text with version number of the Documentum client rest image.

3. Edit the documentum-resources-values-**<size>**.yaml file from the Documentum helm charts that is used for the Documentum deployment.

- Add the following block to the end of the file:

```
myinsight-server:
  replicaCount: 2
    docbroker:
      count: *docbroker_count
  graylog:
    volumeClaimTemplate:
      logVctSize: 2Gi
  customConfigurations:
    persistentVolume:
      size: 2Gi
  persistentVolume:
    size: 1Gi
  storage:
    PVCSize: 4Gi
  resources:
    limits:
      cpu: 800m
      memory: 8Gi
    requests:
      cpu: 500m
      memory: 4Gi
```

- Replace the value for replicaCount with the number of myInsight Server instances you want to run.
- Replace the sizes and resource values with values suitable for your system.

- For Documentum versions before 24.4 the *docbroker_count value isn't resolved. This should be replaced by the number of docbrokers configured in the environment.

4. Edit the values.yaml file:

- Add the following block to the end of the file:

```
myinsight-server:

  ### Environment ###
  env:
    domain: *env_domain

  ### Docbase ###
  docbase:
    name: *docbase_name

  ### Persistent Volume ###
  persistentVolume:
    storageClass: *rwo_storage_class

  storage:
    PVCStorageClass: *rwm_storage_class

  certificate:
    use_certificate: *use_certificate
    dbrserviceName: *dbr_service_name

  graylog:
    enable: *graylog_enable
    volumeClaimTemplate:
      logVctStorageClass: *rwo_storage_class

  serviceAccount:
    createserviceaccount: false
    serviceAccountName: *documentum_service_account

  extension:
    createPVC: false
    PVCStorageClass: *rwm_storage_class
    pvcName: *tomcatbase_commonpvcname
    #Update the below parameters in case of Static
 Provisioning in AWS
    staticPVName:
    reclaimPolicy:
    awsEFSCSIDriver: efs.csi.aws.com
    awsEFSCSIHandle:

  ### Custom Configuration ###
  customConfigurations:
    persistentVolume:
      storageClass: *rwm_storage_class
```

```
    serviceType: *webapp_service_type
```

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

4.9. Enable ingress for myInsight

1.

Edit the configuration.yml file from the Documentum helm charts.

- Add the following block to dctm-ingress:

```
extraPaths:
  - backend:
    service:
      name: <servicename>
      port:
        number: 8080
    path: /myInsight
    pathType: ImplementationSpecific
```

- Replace **<servicename>** with the name of a service that also hosts the myInsight webapplication.

  If you enabled myInsight for D2-Classic / Classic View then this value should be d2client (For Documentum 22.4 to 23.4) or d2classic (for Documentum 24.2 and newer).

  Otherwise if you enabled myInsight for D2-Smart View / Smart View, then this value should be d2smartview.

  Otherwise if you enabled myInsight for D2-Rest, then this value should be d2rest.

Warning Yaml indentation is lost when copying text from PDF. Make sure that indentations match with how it appears in this document.

5. How it works for Documentum versions 20.4 up to 22.1

This chapter describes how the Docker image and the Helm chart deploy myInsight to the Documentum pods.

5.1. Persistent Volume

The myInsight deployment for Kubernetes uses two Persistent Volumes:

1. The shared-pvc Persistent Volume which is accessed by the dcs-pg pods and created by the d2installer deployment.
2. The d2client-shared-pvc Persistent Volume which is accessed by the d2client pods and created by the myInsight-installer deployment.

5.2. Pods

myInsight gets deployed to the dcs-pg and d2client pods. To do this, a myinsight-installer pod is deployed to the same namespace as Documentum.

5.2.1. myinsight-installer

This is a small pod similar to the d2installer pod which copies the myInsight installation software and configurations to the d2client-shared-pvc and the shared-pvc Persistent Volumes.

A marker file named "myInsight-installercopy-succeeded-9.0" is also placed on the Persistent Volumes.

5.2.2. dcs-pg

This is the Content Server pod from OpenText Documentum. Because the dockerimagesvalues.yaml file was updated this pod will wait for the myInsight marker file to be present on the shared-pvc Persistent Volume before continuing deployment.

After the Content Server and D2 installations have been completed the myInsight script 30myinsightcsdeploy.sh will run.

On the first dcs-pg pod (dcs-pg-0) this script will check which version of myInsight is installed in the repository and will install of upgrade myInsight if needed.

On the (optional) other HA dcs-pg pods the script will exit immediately.

5.2.3. d2client

This is the pod from OpenText Documentum with the D2 webapplication. Because the values.yaml file was updated, this pod will wait for the myInsight marker to be present on the d2client-shared-pvc Persistent Volume before continuing deployment.

After the D2 webapplication is configured, the myInsight script 10myinsightwebappdeploy.sh will run.

This script will install the myInsight web application to the same Tomcat instance as the D2 webapplication is installed on.

5.3. D2 Ingress

The D2 Ingress configuration is updated to include the /myInsight path, to make myInsight available on the same URL as D2.

6. How it works for Documentum versions 22.4 and newer

This chapter describes how the Docker image and the Helm chart deploy myInsight to the Documentum pods.

6.1. Persistent Volume

myInsight uses the following Persistent Volumes:

- d2custom-shared-pvc is used for copying the myInsight software from our init container to the client pods.
- dcs-data-pvc is used for copying the myInsight software from our init container to the content server pods.
- myinsightserver-storage-pvc is used by the myinsight-server pods to share the created report.
- myinsight-server-vct-myinsight-server-* one for each myinsight-server pod is used to store the dfc.keystore for that pod.
- shared-logs-myinsight-server-* one for each myInsight-server pod is used to store the logfiles for that pod.

6.2. Pods

When our myinsight-installer container is added as an init-container to the pods below it will copy the myInsight software to the corresponding pod and prepares an installation script to run during the start of the pod.

6.2.1. dcs-pg

After the Content Server and D2 installations have been completed the myInsight script 30myinsightcsdeploy.sh will run.

On the first dcs-pg pod (dcs-pg-0) this script will check which version of myInsight is installed in the repository and will install of upgrade myInsight if needed.

On the (optional) other HA dcs-pg pods the script will exit immediately.

6.2.2. d2classic

After the D2 Classic / Classic View deployment has been completed the myInsight script 10myinsightwebappdeploy.sh will run.

This script will copy the full myInsight webapplication to the same tomcat instance as the D2 Classic / Classic View webapplication is installed on.

6.2.3. d2smartview

After the D2 Smart View / Smart View deployment has been completed the myInsight script 10myinsightd2smartviewdeploy.sh will run.

This script will copy the myInsight for SmartView plugin to the D2 Smart View / Smart View application and install the Fusion Interface resources webapplication to the same tomcat instance as the D2 Smart View / Smart View webapplication is installed on.

6.2.4. d2config

After the D2 Config / Client Configuration deployment has been completed the myInsight script 10myinsightd2configdeploy.sh will run.

This script will copy the myInsight for D2 Config plugin to the D2 Config / Client Configuration.

6.2.5. d2rest

After the D2 REST deployment has been completed the myInsight script 10myinsightd2restdeploy.sh will run.

This script will copy the myInsight for REST plugin to the D2 REST application and install the Fusion Interface resources webapplication to the same tomcat instance as the D2 REST webapplication is installed on.

6.2.6. myinsight-server

myinsight-server uses the generic tomcat container and the D2 REST extension container to create a pod with the same Tomcat and Documentum versions as used by the OpenText pods.

Index