



# myInsight for Documentum

## User Guide Smart View

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# 1. Version History

Date	Changes	Version number
3-March-2025	Initial version for myInsight 9.0.	1.0

## 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.

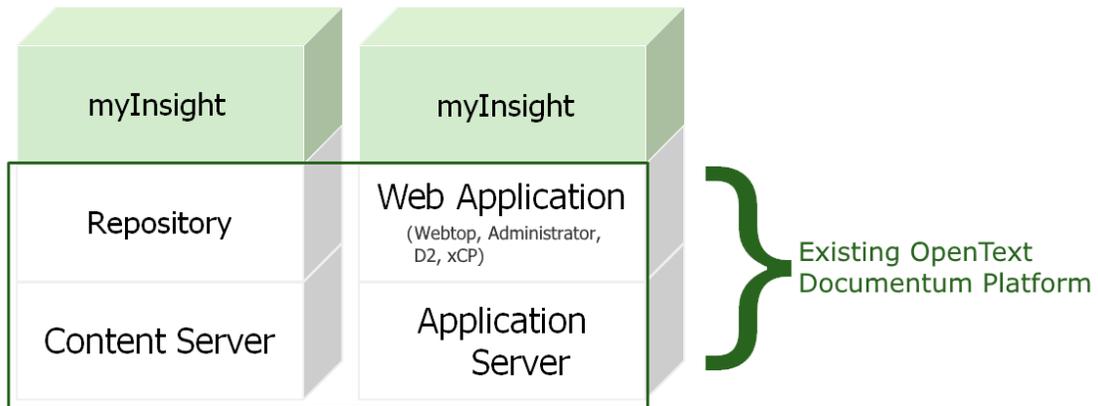


Figure 1: myInsight integration into the OpenText Documentum platform

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 manual supports end users in utilizing myInsight reports within Documentum Smart View. Further details about the product myInsight, can be found in our user manual 'User Guide - D2-xCP-Standalone', available in the [Resource Library](#) on our website.

### 3. Landing Page

On the Smart View Landing page you will be able to view Report Tile(s) and/or Report List Tile(s) that your administrator has configured.

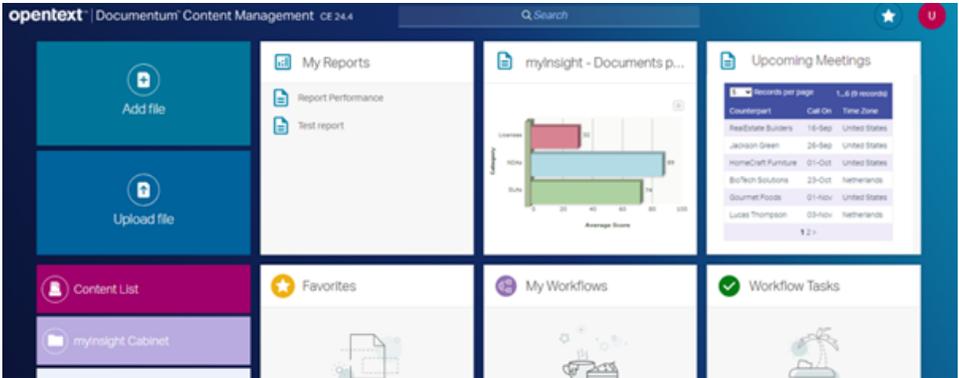


Figure 2: Smart View Landing page

#### 3.1. Report Tile

The Report Tile allows you to view a report on the landing page. **Configuring a Report Tile (Admin)** on page 6 describes how Documentum administrators can configure this.

##### 3.1.1. What can you do on the Report Tile?

###### 3.1.1.1. Open the Report Navigator

Clicking on the header, or the far-right button inside the header will open the Report Navigator.

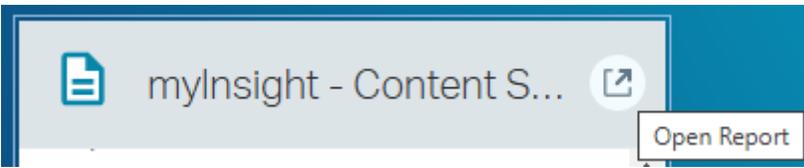


Figure 3: Report Tile Open Report Navigator

##### 3.1.2. Configuring a Report Tile (Admin)

Documentum administrators can configure a Reports Tile on the Landing page. This can be done in D2-Config by creating a widget of type 'MyInsightReportWidget' and setting in the Parameters section the report\_path to the report definition that needs to be displayed.

Example:

Widget type: \*

**Focus Events**

Add focus events (optional) ?

- D2\_ACTION\_ADVANCED\_SEARCH
- D2\_ACTION\_ADVANCED\_SEARCH\_CATEGORY\_DIALOG
- D2\_ACTION\_ALTERNATE\_HELP
- D2\_ACTION\_CLIPBOARD\_CHANGED
- D2\_ACTION\_CLIPBOARD\_CONTENT
- D2\_ACTION\_CLIPBOARD\_GET
- D2\_ACTION\_COMMENT
- D2\_ACTION\_COMPONENT\_NATIVE\_ACTION
- D2\_ACTION\_CONTENT\_ANNOTATE\_NATIVE\_ANNOTATION
- D2\_ACTION\_CONTENT\_CANCEL\_CHECKOUT

**Parameters:**

report\_path :

Figure 4: Configure a Report Tile

### 3.2. Report List Tile

The Report List Tile allows you to view a list of report definitions on the Landing page.

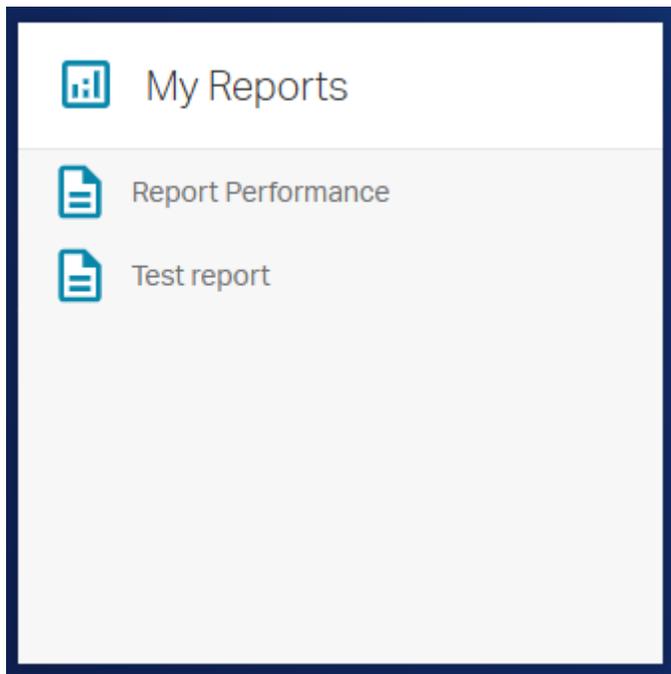


Figure 5: Report List Tile

**Configuring a Report List Tile (Admin)** on page 9 describes how Documentum administrators can configure this.

### 3.2.1. What can you do on the Report List Tile?

#### 3.2.1.1. Open the Report Navigator

Clicking on the header, or the far-right button inside the header will open the Report Navigator.



Figure 6: Open Report Navigator from Report List Tile

#### 3.2.1.2. Run a Report in the Report Navigator

You can open a specific report in 2 ways:

1. By clicking on the row it occupies.
2. By hovering over the row, clicking the "More" button and clicking the left button:



Figure 7: Run a Report by clicking "More" in the Report List Tile

If there is only a single presentation that can be run without further input, it will be run immediately. Otherwise, a dialog will open. For more information, see **Report Dialog** on page 12

#### 3.2.1.3. Copy a link of the Report Definition to the clipboard

You can copy a link to a specific Report Definition without running the report by:

- Hovering over the row, clicking the "More" button with the 3 dots and then clicking the right button that has appeared:



Figure 8: Copy a link of the Report Definition

This has the advantage that it will not run the report before being able to share the report.

### 3.2.1.4. Search through the list

You can search the list of Report Definitions by hovering over the header and clicking the magnifying glass button and typing a search word in the input field.

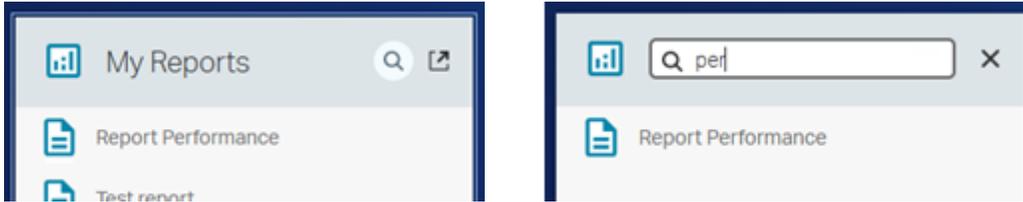


Figure 9: Search the Report List Tile

### 3.2.2. Configuring a Report List Tile (Admin)

Documentum administrators can configure which reports should be displayed in the Report List Tile. This can be done in D2-Config by creating a widget of type 'MyInsightReportListWidget' and setting in the Parameters section the report\_category\_path to the report folder of which the content needs to be displayed

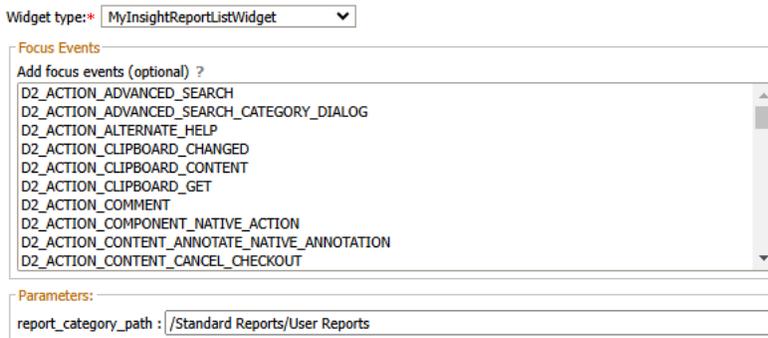


Figure 10: Configure a Report List Tile

## 4. Report Navigator

This view can be accessed via a Report Tile and/or a Report List Tile on the Smart View Landing page.

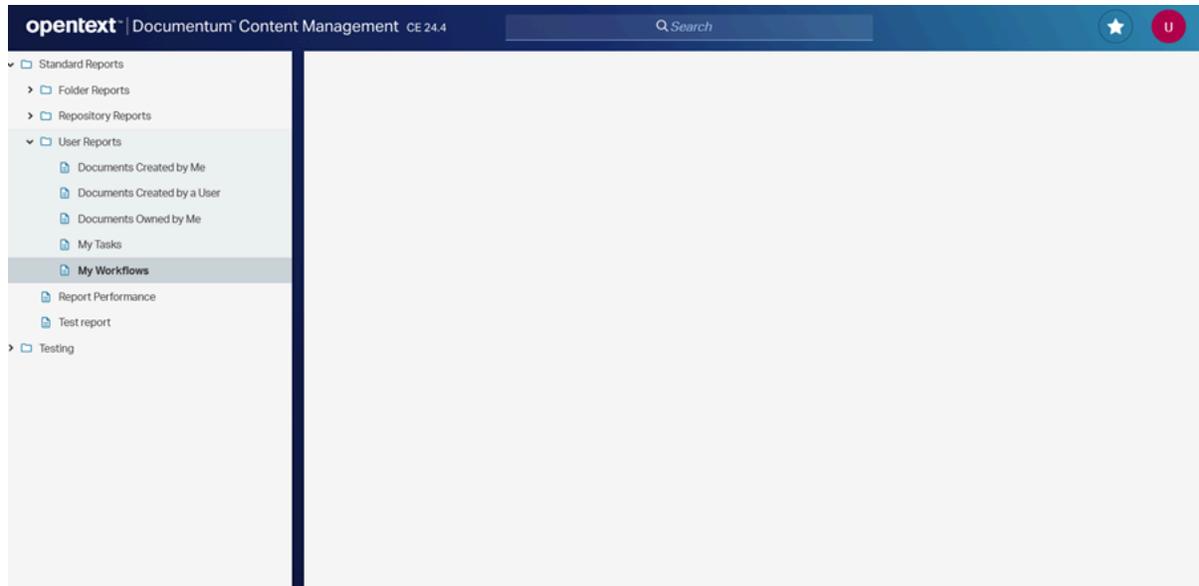


Figure 11: myInsight for Documentum Report Navigator

- On the left a list of all Reports Categories (folders) and/or Reports Definitions inside those folders will be shown.
- On the right the chosen report will be shown.

### 4.1. What can you do in the Report Navigator?

#### 4.1.1. Run a Report

On the left you can navigate a hierarchical view of the Report Categories (folders) and their Report Definitions.

You can run a Report by clicking it.

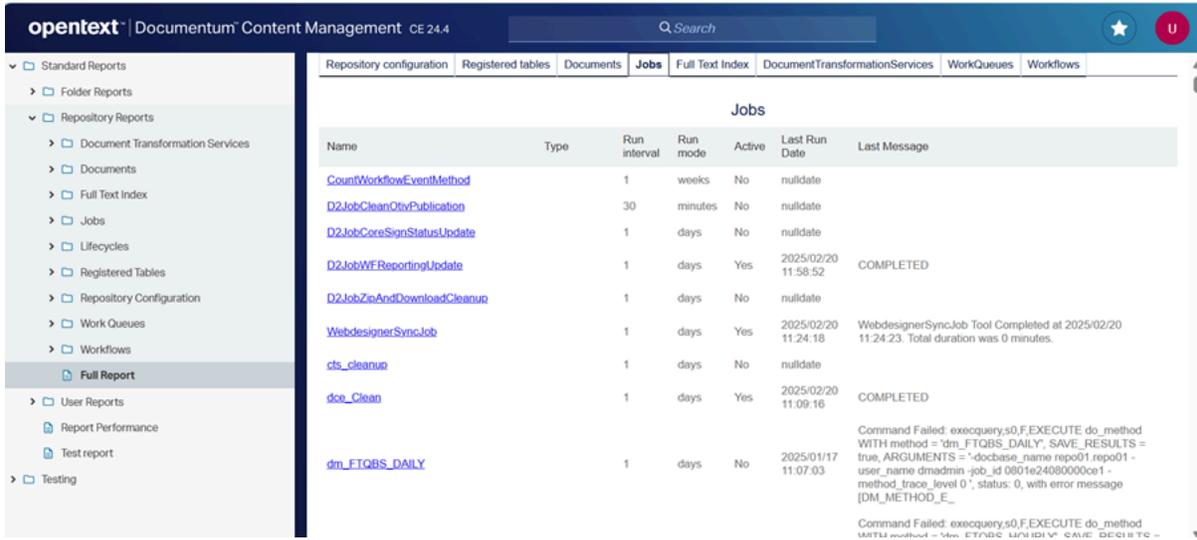


Figure 12: Run a Report from the Report Navigator

If there is only a single presentation that can be run without further input, it will be run immediately.

If user input is needed, the Report Dialog opens (see [Report Dialog](#) on page 12).

## 5. Report Dialog

When running a Report that requires user input, a Report Dialog will be shown on the right. This dialog is called 'Report options' (see text in turquoise header below).

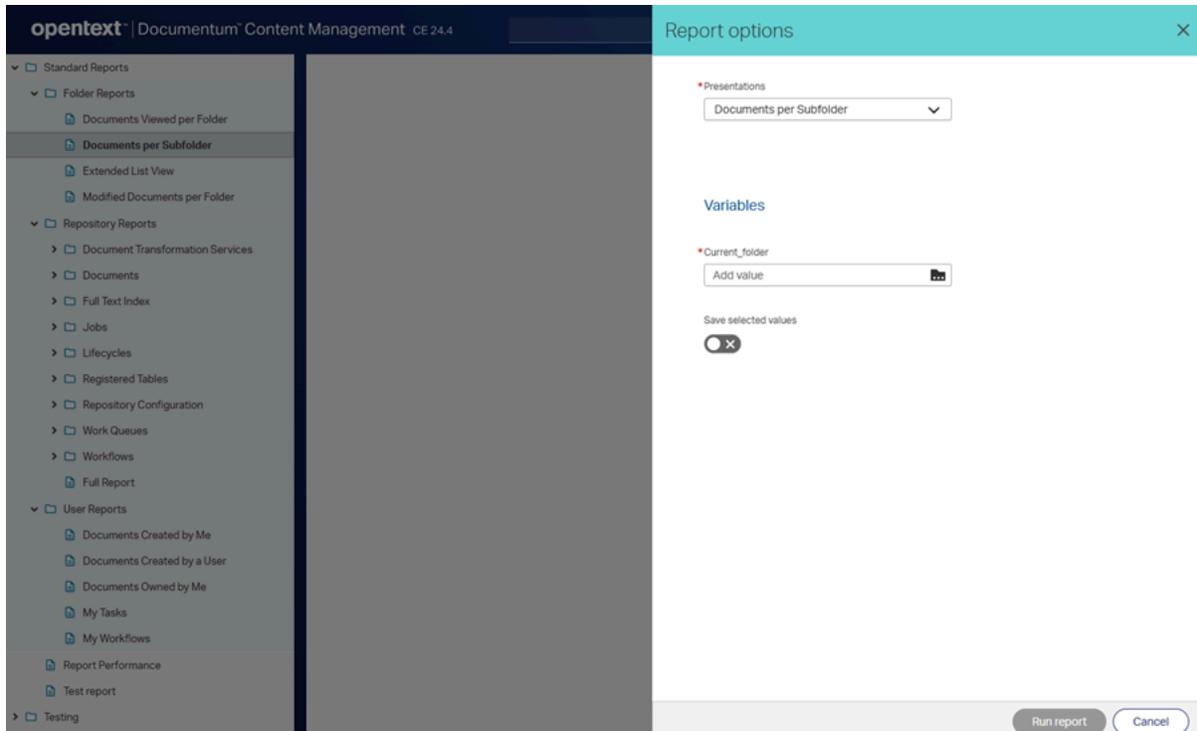


Figure 13: Report options

Input Variables that are preceded by a red star (\*) are mandatory. Only after setting them, the 'Run report' button at the bottom of the Report Dialog will turn blue:



Figure 14: Report Dialog confirmation buttons

### 5.1. Presentations

A dropdown will show the Presentations defined by your administrator for the chosen Report Definition.

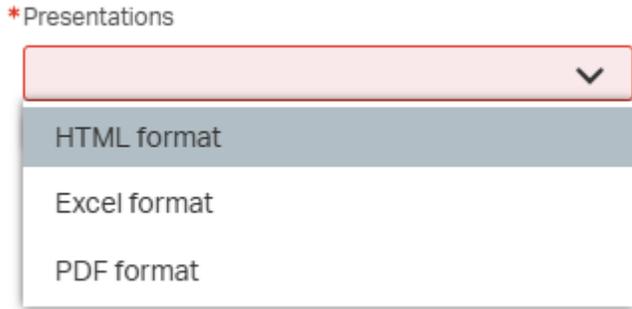


Figure 15: Select Report Presentation

## 5.2. Variables

This is only present if your administrator has defined Variables for the chosen Report Definition. In this form you can specify the values for the Variables. Variables can for example be: text fields, date fields, drop down fields or lookup fields.

### Variables



Figure 16: Select Report Variable

### 5.2.1. Save selected values

This is only present if your administrator has allowed users to save their selected values. If this option is turned on, the values for the Variables will be stored when running the report and when the Report Dialog for this Report Definition is opened again, the previously stored Variable values will be pre-populated.

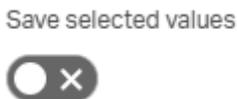


Figure 17: Save Report Variable Values

## 5.3. Destination

This is only present if your administrator has allowed users to select a destination for the chosen Report Definition.

Example: select whether the report should be stored in the repository, or whether it should be sent to an email-address.

## 5.4. History

This is present depending on the configuration by your administrator for the Report Definition. Historical reports can be scheduled to run periodically and the results are stored in Documentum in order to build trendlines.

### 5.4.1. Include current data

This toggle is used to indicate if the queries that are set on this report should run or not. If the checkbox is not checked, you will only get historic data. If the checkbox is checked, you will also get the current data.

### 5.4.2. Include historic data

This toggle is used to indicate if historic data should be included in the report. The two date selectors below this checkbox can be used to specify the period you want to be included in the historic data.

## 5.5. Report Definitions

This is only present when using the Workflow Detail or Content Properties integration. A dropdown will show the Report Definitions defined by your administrator which are applicable to the Workflow or Content you are running a report for.

See [Workflow Detail and Content Properties integration](#) on page 15 for more information.

## 6. Workflow Detail and Content Properties integration

### 6.1. Accessing the "myInsight reports" integration

This option makes it possible to run reports based on a selected object. For example from the content properties view, which can be accessed by clicking on the 'i' in the menu that appears when hovering on an object:

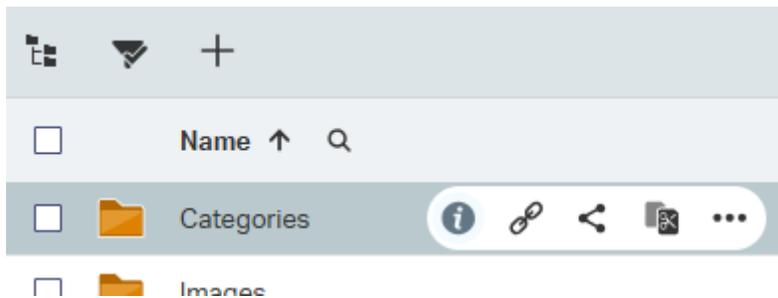


Figure 18: Open the content properties view

In a workflow detail or content properties view, click the arrow pointing down next to Properties and select "myInsight reports".

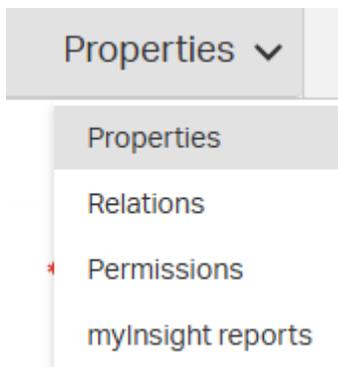


Figure 19: Select myInsight report from properties

### 6.2. Running a report

If there is only a single report that can be run without further input, it will be run immediately.

Otherwise, a dialog will be shown where the desired report and variables (if required) can be provided before running the report (as described in [Report Dialog](#) on page 12).

### 6.3. Re-running a report

If the report can be re-run without further input a "Re-run report" button will be available on the upper right side of the screen. If the report requires further input to be re-run, a "Change report" button will be available on the upper right of the screen.

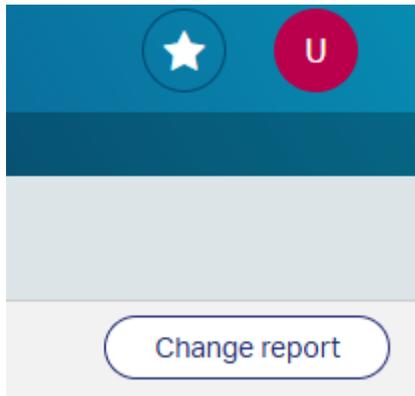


Figure 20: Change Report

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