



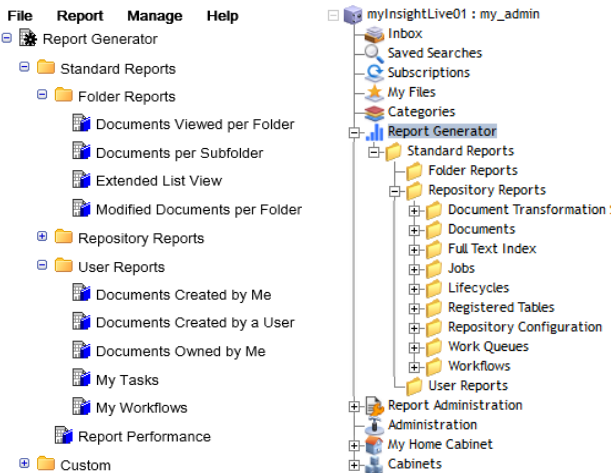
# MYINSIGHT

## Dashboards & Reports



**Report User**

There are 2 ways of using myInsight reports:  
 - View reports via a dashboard within D2 or xCP  
 - Choose a report from the report folders. Report Definitions ('reports' for short) can be accessed via the Report Generator treenode which is shown in the normal tree node of Documentum.



**Starting a report from the report folder**

1. Browse through the report folders. 'Standard Reports' contain predefined reports which are valid for all Documentum environments.
2. Double-click on a Report Definition to generate the report.
3. If no extra information is needed, the report will be displayed directly. If the report needs more information to generate the output, an extra dialog will be displayed. The variables can be used to define the output.  
 \* are mandatory fields

For example:

**Run report: Documents Created by a User**

Select a stylesheet: PDF 1

Set these variables to run the report

User name : \* dmadmin 2

From Date : \*  3

Save selected values  4

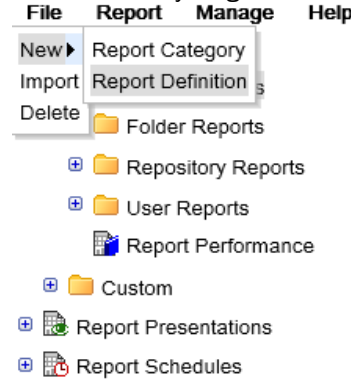
OK 5 Cancel

1. Select the stylesheet that needs to be used for this report (to determine how your report looks like).
2. Select a user from the dropdown list
3. Use the date selector to specify the period to include.
4. Optional: save your currently selected values for next report creation
5. Click OK to generate the report



**Report Builder/ Report Administrator**

New reports can be created via the File menu in the myInsight user interface.



The first 2 tabs contain mandatory fields.

- 'Info' are the Documentum meta data fields of the report

**Info** ReportTool Email History Advanced

Name : \*

Title :

Subject :

Keywords :

Authors :

Size :

Owner Name :

Version Label :

Checkout Date :

Checked Out By :

Show more

OK Cancel

- 'ReportTool' let you define the data and format of your report

**Info** ReportTool Email History Advanced

Report Name : \* 1

Destination : \* 2 0 item(s) ...

User can select destination :

Presentation : \* 3 0 item(s) ...

Variable : 0 item(s) ...

DQL Select query : \* 4 0 item(s) ...

1. Name to show in the report.
2. Where to store the report?
3. Format of your report (e.g. dashboard or PDF file).
4. Data to display, gathered via DQL