myInsight for Documentum

Release Notes

Contents

1. Version History

Date	Changes	Version number
2-June-2016	Update for myInsight v5.1 Importing and exporting report packages. Web services and mobile application.	1.0
21-April-2017	Update for myInsight v6.0. xCP integration, Arabic right-to-left interface.	1.1
03-October-2018	Update for myInsight 7.0.	1.2
18-June-2019	Update for myInsight 7.1.	1.3
18-March-2020	Update for myInsight 7.2.	1.4
26-March-2021	Update for myInsight 7.4.	1.5
13-April-2023	Update for myInsight 8.0.	1.6

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 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.
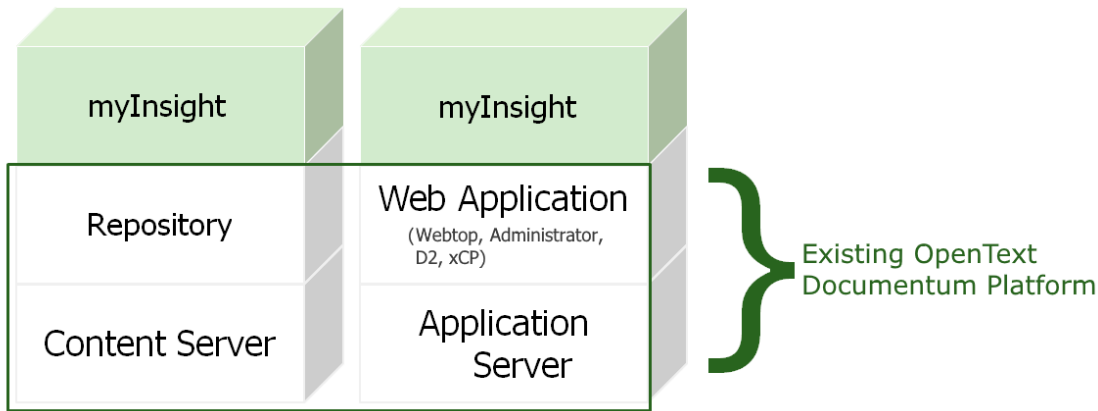
Figure 1: myInsight integration into the OpenText Documentum platform

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 has become part of the Acolad Group.

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

3. Environment and System Requirements

Acolad Digital supports installation of myInsight with the following Documentum products:

- Documentum Content Server 7.3 up to 22.4[*]
- Documentum Webtop 16.7[*]
- Documentum xCP 16.7 up to 22.4
- Documentum Administrator 7.3 up to 22.4[*]
- Documentum D2 4.7 up to 22.4 running with Documentum Content Server 7.3 up to 22.4[*]

*) These products must be installed following the instructions in the corresponding documentation

Acolad Digital supports myInsight with the following XSLT processors:

- Xalan [*]
- Saxon-HE (Saxon-B)
- Saxon-PE / Saxon-EE (Saxon-SA) [**]

*) This is the default XSLT processor used by the myInsight and is included with Documentum

**) These versions require an additional licence from Saxonica

3.1. Webservice Environment and System Requirements

The following requirements must be met for an installation which includes the myInsight webservice.

> **(!) Important** myInsight webservices are not compatible with myInsight 5.0 license files (or older)!

Supported Java versions are 8 and 11.

Supported Tomcat versions are Tomcat 8 and 9.

Supported DFS versions are 16.7 up to 22.4.

3.2. myInsight Server Environment and System Requirements

myInsight Server is supported with the following software:

- Supported Java versions are 8 and 11.

- Supported Tomcat versions are Tomcat 8 and 9.
- Supported DFS versions are 16.7 up to 22.4.

4. What's New

The 'What's New' chapter describes the new features for this release.

Functionality	Description
New feature	D2 Dictionaries can now be used to translate values from the query results to their display values.
New feature	Silent/scripted import of myInsight Report Packages.
New feature	Report definitions now have an optional description which will be displayed as a subtitle on the Fusion Interface reports.
New feature	Fusion Interface reports have a new option "Display Variables" which will display the variables set by the user on the report.
New feature	Fusion Interface reports have a new option "Replace Window URL" which works the same as External Link but will use the link in the current browser.
New feature	Added an option to the myInsight Configuration to disable the use of saved selected values.

5. What's Improved

Functionality	Description
Generating reports	The object id of the Report Definition is now available in the XML processed by the Report Presentations.
Generating reports	The available presentations on the Report Definition and which one was selected by the user are now available in the XML processed by the Report Presentations.
Generating reports	The display labels of the variables are now available in the XML processed by the Report Presentations.
Fusion Interface	Links on values are no longer created when there is no value in the ID column for that row.
Fusion Interface	Date filter selections no longer require a time input.
Running reports	Saved values for object variables are now shown by their object name instead of the object id.
Running reports	Variable values set by the user before changing the presentation selection are no longer reset to the default value.

6. What's Fixed

The 'What's Fixed" chapter describes bugs and issues fixed for this release.

Functionality	Description
FusionInterface	Export to Excel no longer shows the columns that were added to the hideColumns variable.
FusionInterface	Filtering on values in a column didn't include values with diacritics.
Report Schedules	Report Schedules: Fixed an "User must input a value" error when creating Report Schedules in DA.
Report Definitions	Fixed an "Uncaught TypeError: checkboxElement is null" error when opening Report Definition properties in DA/Webtop.
Report Definitions / Report Schedule	Fixed an "Uncaught ReferenceError: columnCount is not defined" error when removing or moving rows in the Destination, DQL, Presentation and Variable screens in DA.
Report Definitions / Report Schedule	Fixed a problem where the OK and Cancel buttons on the Destination, DQL, Presentation and Variable screens no longer worked after editing a row in DA using the Firefox browser.
Running reports	Fixed a problem where a choice list variable didn't automatically select the previously by the user saved value if the choice list contained a value and display label part.
Performance	Prevent stuck threads in the myInsight Widget when the UI contains long running reports.

7. Impact Analyses

The impact analysis describes the influence of recent changes and additions on existing functionality. When for example a piece of new functionality requires reconfiguration of existing functionality, it will be stated in this chapter. In some cases impact have to be considered **prior** to upgrading environments while others mainly influence environments after upgrade.

7.1. Impact to Consider Prior to Upgrading

If these impact influence the environment which is about to be upgraded, take appropriate actions before upgrading the environment.

Impact on myInsight version 6.0
When upgrading to myInsight 6.0, a **new license key is required!** Old license keys will not work.

Impact on myInsight version 5.1
When upgrading to myInsight 5.1, it is no longer possible to query for the field 'last_status' on report definition objects. Instead, 2 new fields have been added to the my_usage_report_object: 'status' and 'error_message'.
When upgrading to myInsight 5.1, a **new license key is required!** Old license keys will not work.

Impact on myInsight version 5.0
When upgrading to myInsight 5.0, the values that have been saved using 'Save selected values' (checkbox when running reports) will be lost.
Object types have been renamed from 'dlt_/edrg_' to 'my_'. Any queries that reference the old object types will no longer work.
Usage information that has been saved before upgrading to 5.0 will remain in the 'edrg_usage..x'. Information captured after the upgrade will be stored in: 'my_usage..x'
There are known issues when upgrading on Documentum 6.7 (without service packs). The installation software detects if you are trying to upgrade on 6.7. Please follow the instructions that the installer software provides. Ignoring these instructions can result in broken myInsight software.
Upgrading will take longer if a substantial amount of reports have been created.

7.2. Impact to Consider After Upgrading

These impact influence any upgraded environment. Consider those impact which influence the upgraded environment carefully. Where possible, configuration advises are given how the impact can be handled after upgrade.

Also be aware of the impact listed below.

Functionality before myInsight v7.4 release	Impact on myInsight version 7.4	
Variable values with quotes	Impact	After upgrading to myInsight 7.4 quotes in variables values will be automatically escaped when the variable is used in a query.
	Example	
	Advice	Check the existing reports if they have variables that rely on single quotes in their values and select the "Do not escape" option.

Functionality before myInsight v5.0 release	Impact on myInsight version 5.0	
Custom stylesheet referencing .WAR file	Impact	The .WAR file containing the 'Graphical Reports' has been renamed in 5.0.
	Example	
	Advice	Please delete the existing .WAR file after upgrading. Custom stylesheets that reference this location need to be manually updated. All widgets that reference 'eDRG' should also be manually updated to reference 'myInsight'.
Log level configuration	Impact	Log level configuration will no longer be done in 'dlt_report_generator_configuration.xml' after upgrading.
	Example	
	Advice	The new configuration can be done in: 'myInsight.properties'. The new file is located in 'web-inf/classes' .

8. Known Imperfections and Limitations

This chapter identifies imperfections and limitations that may affect the use of myInsight. Acolad Digital will attempt to solve all flaws within this product. Flaws that are categorized as limitation cannot be solved due to third party dependence unfortunately.

8.1. Imperfections

Functionality	Description
FusionChart Drilldown	When drilling down in a chart on a column which name contains a percentage sign (%), the drilldown will not occur.
Postgres report generation	The report 'Extended List View' does not work on postgres.
Installation on EPFM	When installing myInsight on EPFM, the following notification appears: "Unable to verify the users permissions. Only continue if you are sure this user is the installation owner." Select Continue.
Installation on EPFM	When installing myInsight on EPFM, the notification will appear that the installation software can't install the roles. Installation of the roles needs to be done manually.
Patch installation on web application	When a patch has been installed on the web application (Webtop/ DA), the file version.properties can be overwritten by a file that is not recognized by the installation software. Solution: add the following line in the file with <version> = the version number of the web application.version=<version> e.g for Webtop 6.7:version=6.7
Demo report 'Documentum transformation services' does not work.	If there is no registration in the repository of Documentum transformation servers, this demo report will not work properly.In this case the following error is presented: "[DM_QUERY2_E_TABLE_NOT_FOUND] error: the database table or view was not found in the database"

Functionality	Description
Sending reports by e-mail.	In Documentum 7.0 this functionality is not working properly and related to known Documentum issue 171094.A workaround for this flaw is described below.On the Documentum content server, remove the following file from the Documentum Java method server: • -%DFC_USER_DIR%\jboss?.?.0\server \DctmServer_MethodServer\deploy\ ServerApps.ear\APP-INF\lib \activation.jar If available in the system, please also remove the following file from the Documentum Java method server: • %DFC_USER_DIR%\jboss?.?.0\server\serviceConfig\ MethodServer\lib\activation.jar
Errors on demo reports using Saxon XSLT processor	Using the demo reports or 'General Presentation' files with the Saxon XSLT processor installed, will give the error message: "Cannot find a matching 0-argument function named {http:// xml.apache.org/xslt/java}java.util.Date.new().....".This happens because these functions are specific to the default Xalan XSLT processor and cannot be used with the Saxon XSLT processor.
PDF report widget becomes unusable after opening Help or refreshing report with user input	When a PDF report is shown inline, and the Help function is opened or a report requesting user input is refreshed, the widget showing the PDF report becomes unusable.

8.2. Limitations

Functionality	Description
XSL-FO errors not presented in log files or to the end-user	XSL-FO is used to create PDF reports. Errors that occur are not presented to the users and are not reported in the log files of myInsight. This is a limitation in the logging method used by Apache FOP and Batik. A workaround is available and described in the document 'Getting Started Guide'.

9. Features and Solved Problems

This chapter describes the features and solved problems of previous releases.

Version	Category	Description
7.4	Support	myInsight for Documentum now supports cloud deployments using Kubernetes on Documentum 20.4 and higher.
	Support	myInsight for Documentum now supports Documentum 20.1, 20.2, 20.3, 20.4 and 21.1
	Support	myInsight for Documentum can now be installed on Content Servers using "secure only" mode.
	New feature	Variable values which contain quotes are now automatically escaped when used in a query.
	Performance	Resolved a thread leak in the myInsight Server.
	Reports	Fixed a situation where the Ok and Cancel buttons on the Run Report dialog remained inactive.
7.0	Support	myInsight for Documentum support for Documentum 16.5 and 16.7.
	Security	Prevent report users from running arbitrary DQL queries on the repository
6.0	New features	• Full support for xCP 2.3 • Support for Arabic right-to-left text • Variables in Report titles • New Fusion Interface variables for table cell alignment, embedded links and hiding columns for readers • Support for Postgres • Sending reports to Documentum users and groups
	Improved	• Object variables for non-sysobjects • Improved performance for scheduled reports • Non-ISO datetime XML input based on a date format is now supported • Numbers are now aligned around the decimal delimiter

Version	Category	Description
	Solved	• Translation corrections • Changed dynamic chart caption to make it easier to read and more consistent • Using an issue where apostrophe in the report name caused issues • Fixed an issue where the screen would become unresponsive when the a dropdown contains too many users • Fixed various translation errors • Fixed an issue where an unidentified color could be returned • Fixed an issue to with dropdown results limit
5.1	New Features	• Exporting Fusion Interface variables • myInsight webservices • Report Presentation Report presentation can now be configured for Mobile use. • Importing and exporting of report packages. • myInsight license entry in the UI. • Report Schedule configuration options (end date, nr of runs) • It's now possible to change license using the User Interface. • Reports can now also be scheduled with an end date-time field or a limited amount of runs.
	Improved	• Fusion Interface: Simplified chart section, export to Excel, improved grouping/sub-grouping behavior, performance improvements. • Performance of report generation has been improved due to the use of a new display method from D2 4.5 P04. • When the repository gets updated the custom settings of the myInsight configuration will not be overwritten.

Version	Category	Description
	Solved	• Full export of data did not work with 5.0, this has been fixed. • Fixed an issue where importing a Report Definition with Fusion Interface variables fails. • Save Run Mode: this variable wasn't stored properly, when it was set to 'Scheduled Runs', historic data was still updated when the report was run manually. • After performing a full report import, overwritten report definitions will no longer lose their existing historic data. • Manage historic data dialog: the button Show Details could cause a fatal error, this has been resolved.
5.0	New features	• Presentations • Fusion Interface • myInsight report widget
	Improved	• Support for 64 bit Windows/Linux servers. • Historic data: variable awareness. • Session Management: performance improvement for bi-directional sessions. • Variables: date variable
	Solved	• myInsight Open Office report: if format is missing it will be installed. • Report generation: license decryption logic used to much memory. • Historic data: fix for historic data tables on non-Oracle databases. • Date format: 24 hour notation instead of 12.

Version	Category	Description
4.2	New features	• Added support for Documentum 7.1 • Added ability to hide variables • The users can now save the variable values they entered • Import/export actions added to import/export the complete eDRG configuration • Variables on report definitions can now be filled with values on a report schedule, generating the report once for each specified value • Added presentation sets (complex output documents) • Added Office Excel 2010+, Office Word 2010+, OpenOffice Calc and OpenOffice Writer presentation files • Added the FusionInterface presentation file • Reports that are displayed inline in the eDRG Widget can now send events to the eDRG
	Improved	• Default values for repeating variables are now used correctly • Upgraded the underlying framework • Report presentations can be opened by double clicking them • Checked out presentations now have an checked out icon • Removed an unimportant error from the content server installation log file
	Solved	• PDF reports that are shown inline in the eDRG widget can now be closed from the menu bar • The eDRG Widget now accepts the hh:mm time notation for the fields "Allow manual run before" and "Allow manual run after" on report definitions

Version	Category	Description
4.1	Solved	• Cascading variables were not emptied properly when a parent value changed. • Cascading variables in WDK clients selected a value in the dropdown if another was selected previously and the parent variable was changed. • Vertical scrollbar for the eDRG Widget didn't work in Chrome using the left mouse button to move or click on the direction buttons. • Upgrade of the eDRG removed the link to the historic tables for the demo reports. • The historic chart with the Pie 3D stylesheet didn't work. • D2 4.2 error when viewing historic data in graphical chart. • Historic data didn't include last day. • D2 4.2 error when viewing pie chart in historic view. • Creating a new Report Definition within Documentum Administrator resulted in an error message. • Importing a Report Definition in D2 3.1 SP1 failed. • Closing a report in D2 4.x reloaded the tree view. • eDRG help in D2 didn't use all of the available space. • eDRG Help in WDK clients didn't show included images.
4.0	New Features	• Support for D2 4.2. • Full Report Builder functionality in D2 4.x. • Full Report Administrator functionality in D2 4.x. • Support for Bi-directional inline report widgets, D2 events in D2 4.x. • Installer support 64 bits operating systems and silent installer. • New reports: Documents Viewed per Folder, Documents Viewed per Subfolder, Modified Documents per Folder, Documents per Status and Extended List View.

Version	Category	Description
3.5	Solved	• The run report checkbox on the Run Report screen is only shown for reports with the Historic Data option enabled (only D2 2.6, 3.x). • Optional variables are correctly passed through in D2 2.6 and 3.x. • It is not possible anymore to leave the mandatory DQL, Destination, Presentation or Variable screen empty (exception is the Presentation Destination). • A scrollbar has been added to the Run Report screen. • Integer variables and D2 will provide an error when text is used instead of numbers. • The last status value of Report Definitions is now fully visible within D2.
3.1	New Features	• Support for Documentum 6.7 SP1 and D2 3.1. • Dutch language pack added. • A query can be set as default value of a variable. The result of this query is used as default value for this variable in the running report. • A variable can be linked to a Report Category. With this functionality all the reports in the selected Category will contain the linked variable. This way the value of a variable only has to be set once, instead of being defined in each Report Definition separately. • There are two new variable types which can be included in Report Definitions: Object and Boolean. • For D2, an option in the right click menu has been added to generate reports on a selected object. • Historic data can be presented to the end-user by saving the generated results and presenting them each time the report is generated. • The ability to configure Report Definitions and Schedules. • The Documentum query language is supplemented with a new command 'DRG IF', and can be used as follows: DRGIF($var1$,DRGIF($var2$,then,else),else)
3.1.1	Solved	• Updated to installation software to set the required attributes that didn't exist in the previous version on existing report definitions.

Version	Category	Description
3.1	Solved	• Boolean variables can no longer be set as mandatory. • Fixed an issue where the variables on the run report screen were not aligned if a Boolean variable was not the last variable. • Fixed an issue that historic tables were not always updated correctly if the DQL query changed. • Empty the historic table reference when copying a report definition. • Fixed an issue that if a query was specified as the default value for a variable the query would be replaced by the result after the first run. • Removed an additional visible column on the DQL Select screen for D2 2.6. • Nested DRGIF statements are now resolved correctly • Fixed empty time dropdown boxes for date variables in D2 2.6. • Fixed an error when clicking on the + button on the locations tab of the DQL Builder screen. • Fixed an issue where empty fields on for example the variables screen would be filled with Ã characters. • The user now gets an error message when he doesn't enter a DQL, Presentation or Destination for a report definition in D2. • Mandatory object variables are now validated before the report is run in D2.
3.1	Solved	• Systems without D2 installed missed a jar file on the Method Server that is required for the eDRG. This jar file is now always installed.
3.0.1	Solved	• Fixed a problem where reports were not always stored in the historic information tables when there were multiple reports with this feature enabled in the system. • Fixed a problem in the D2-client where the start and end dates for included historic reports were swapped on the run report screen. • The start date for including historic reports is now set to 2 January 1753 on the run report screens instead of the current day.

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