myInsight for Documentum

Installation Guide

AMEXIO

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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 and Arabic right-to-left interface.	1.1
18-October-2018	Update for myInsight 7.0.	1.2
18-June-2019	Update for myInsight 7.1	1.3
26-March-2021	Update for myInsight 7.4.	1.4
30-March-2023	Update for myInsight 8.0.	1.5
22-September-2023	Update for myInsight 8.1.	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.

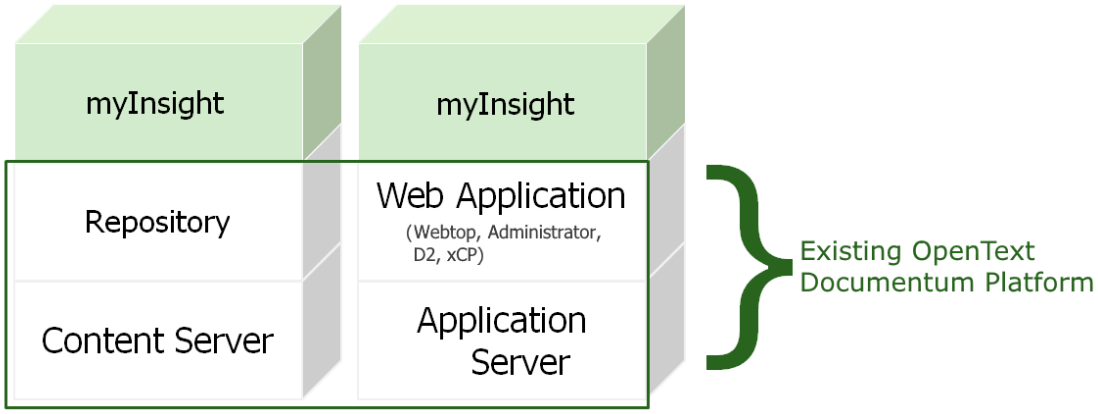

Figure 1: myInsight integration into the OpenText Documentum platform

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 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, upgrading or uninstalling myInsight or have myInsight installed and are planning to upgrade the underlying components or applications.

Note	Before installing or upgrading myInsight, please make sure you've read the Release Notes document first!

Note	To deploy myInsight to the cloud using Kubernetes, please refer to the Cloud Deployment Guide, which is a separate document.

Installation/Upgrading/Updating myInsight

If you're intending to install, update or upgrade myInsight into a repository and/or one or more web applications, this sections helps you to through this process in your OpenText| Documentum environment.

Uninstallation myInsight

If you're intending to uninstall myInsight from an application or in total, this sections helps you to clean up all myInsight components from your OpenText|Documentum environment.

Upgrading underlying components and applications

If myInsight is installed and you're planning to do and upgrade of either Documentum Content Server or a Web Application, this section helps you to keep the impact of this upgrade as minimum as possible.

3. Installation myInsight for Documentum

3.1. Planning the Installation

Caution	You are advised to back up your Documentum environment before making any changes such as installing myInsight.

3.2. Requirements

Requirements for a successful installation are:

- A valid myInsight license file
- Superuser access to a configured repository
- Access to the file system of the application server

Note	For access to the content server and the repository you should use a Superuser account. For access to the application server you should preferably use the account that is used to run the application server.

Note	During installation of the web application customizations, the file 'myInsight_install_log.dat' is created in the 'myinsight' folder in the web application folder. This file is used to store information about the installation and must be available when upgrading myInsight to a newer version.

3.2.1. A Valid License File Available on the Content Server

myInsight uses a provided license file to check the correct use of myInsight for Documentum. Without a valid license file, myInsight won't work at all.

Before starting the Repository Configuration of myInsight, copy the provided license file (default named "myInsight.license") to the Content Server.

3.2.2. XWindows Requirement for Linux or Solaris Sparc Systems

XWindows must be installed on the UNIX host to run the graphical installation program. The xterm program must be in the installation owner's path. The xterm program may be installed in various locations depending on the operating system and software packages installed.

Some typical locations are:

- On Solaris, /usr/openwin/bin

Verify that the xterm program is in one of the preceding paths or in an alternate location and add that location to the PATH variable.

3.2.3. Tomcat version

If you intend to use myInsight for mobile devices, please note Tomcat version 8.0.37 or higher is required. Additionally, make sure to configure tomcat as described in **Configuring Tomcat for myInsight on mobile** on page 96.

3.3. Repository Configuration - Installation

Choose your Operating System:

Operating System	Installation Program
Microsoft Windows	RepositoryConfiguration.exe
Other Operating Systems	RepositoryConfiguration.bin

Note If you are using multiple Content Servers which share a single repository, you only need to install myInsight Content Server once. The installation will add data like object types and jobs to the repository.

3.3.1. Microsoft Windows

Double-click the installation program "RepositoryConfiguration.exe" to start the installer.

The installer starts and initializes the wizard. Please wait until it's fully started and the welcome page of the installer is shown.

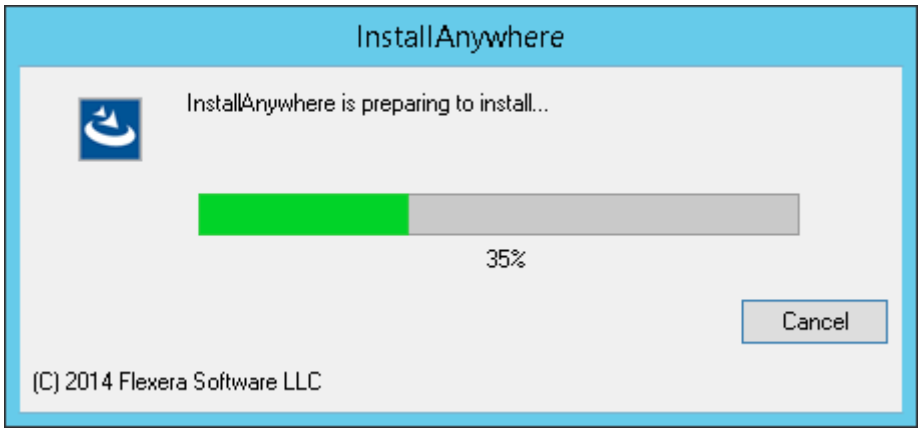

Figure 2: Initialization of the installer

Continue at step **Installation Options (Platform Independent)** on page 10

3.3.2. Other Operating Systems

Start the installation program "RepositoryConfiguration.bin" by using the following command line **./RepositoryConfiguration.bin**

Continue at step **Installation Options (Platform Independent)** on page 10

3.3.3. Installation Options (Platform Independent)

Figure 3: The welcome screen

The 'Welcome Screen' is displayed.

Click on the **[Next]** button to continue with the installation.

or

Click on the **[Cancel]** button to abort the installation.

Figure 4: The License Agreement screen

The Software License Agreement appears. Take time to read it completely and select the option "I accept the terms of the license agreement" when agreed. Click on the **[Next]** button to continue with the installation.

or

Click on the **[Previous]** button to go back to the Welcome screen.

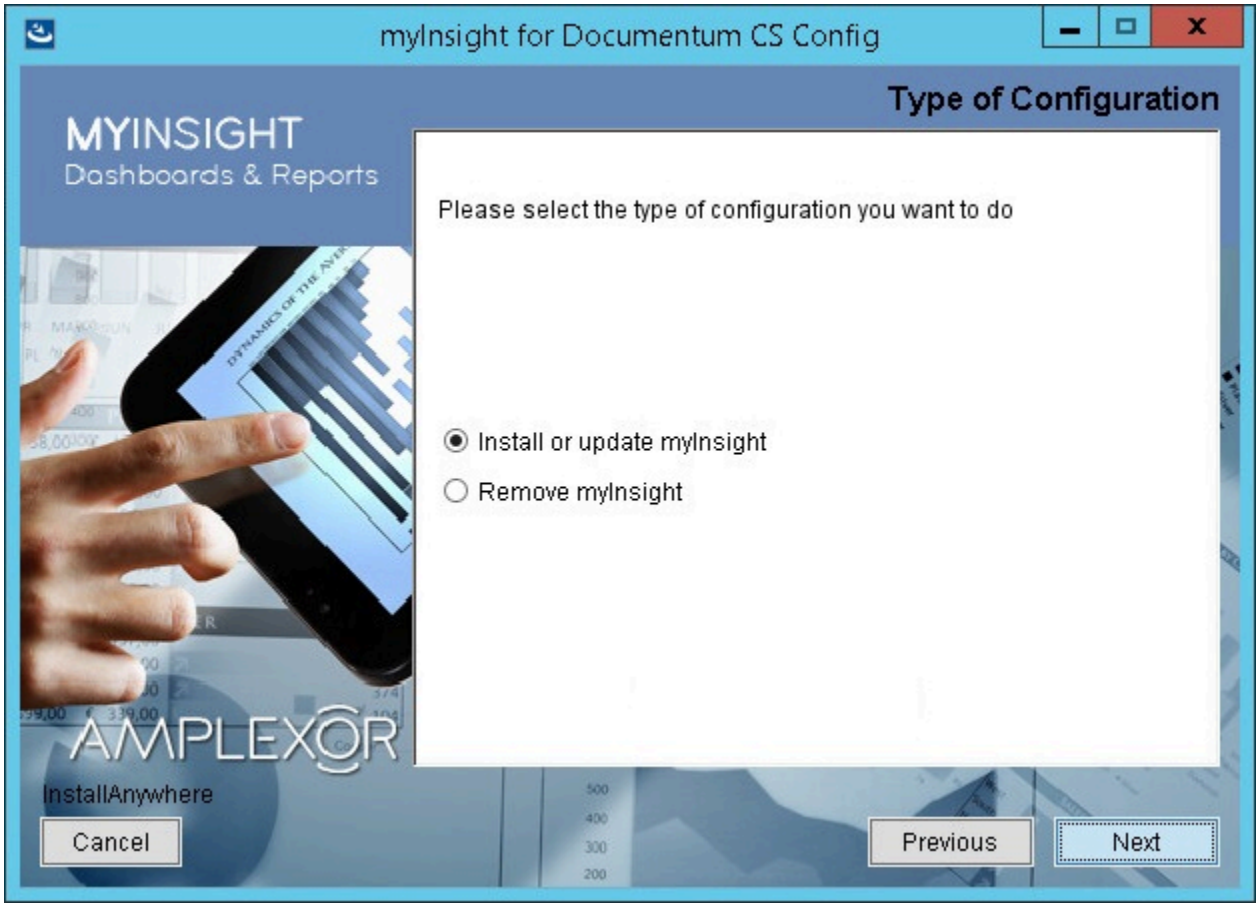

Figure 5: Selecting the type of configuration

Select the option "Install or update myInsight" and click **[Next]** to continue with the installation or update.

or

Select the option "Remove myInsight" and click **[Next]** to uninstall myInsight.

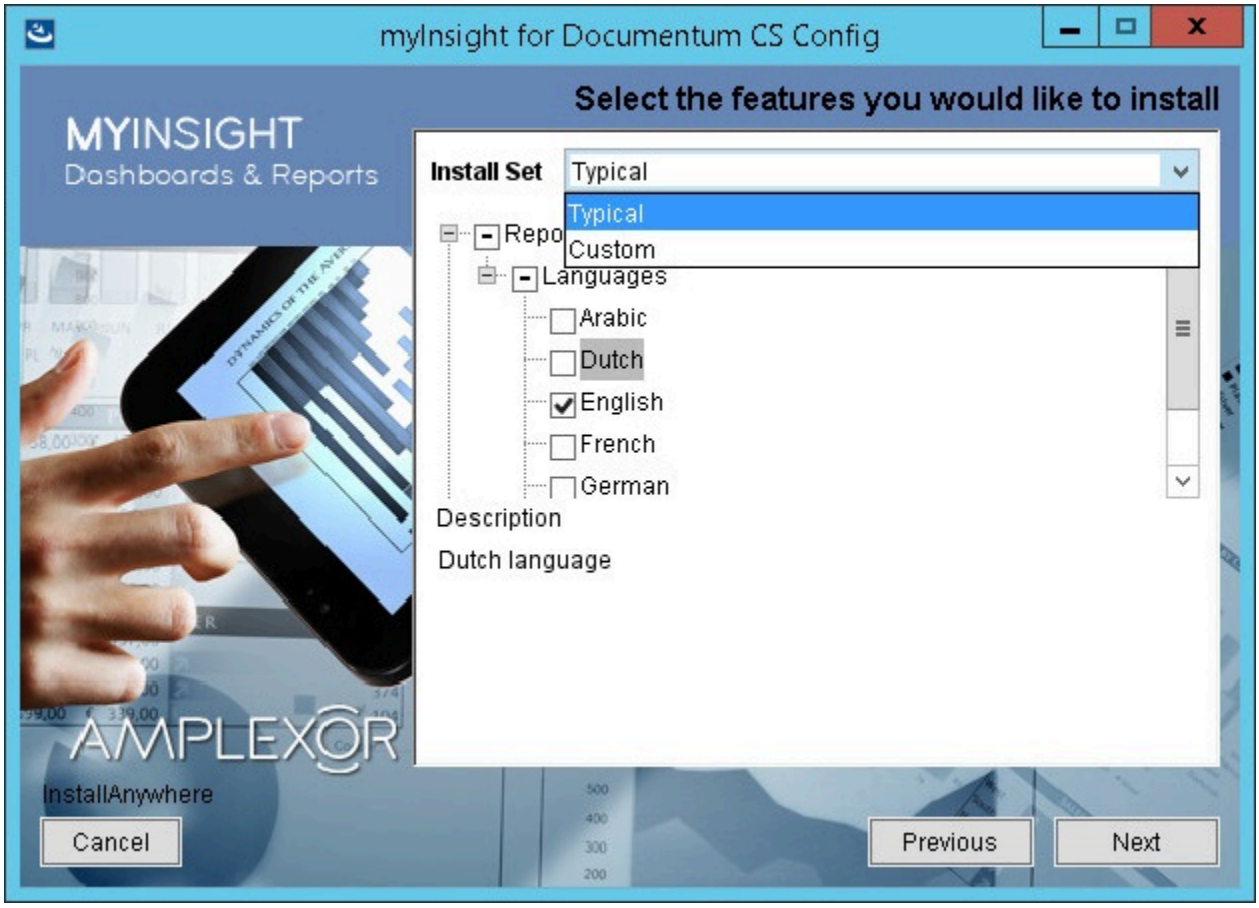

Figure 6: Selecting an installation type

This screen lets you choose additional Languages (Dutch, French, German, Spanish and Arabic). Additionally, you can select the option to install myInsight standalone.

Select the best suited Installation Type:

- Typical: installs myInsight with the language English.
- Custom: any other installation configuration.

Until myInsight v7.0, myInsight reports were always generated and stored on the same content server where Documentum was installed. This can impact the server response time, since the content server might already be occupied executing its regular tasks. Select myInsight Server in order to specify another location for the report generation tasks.

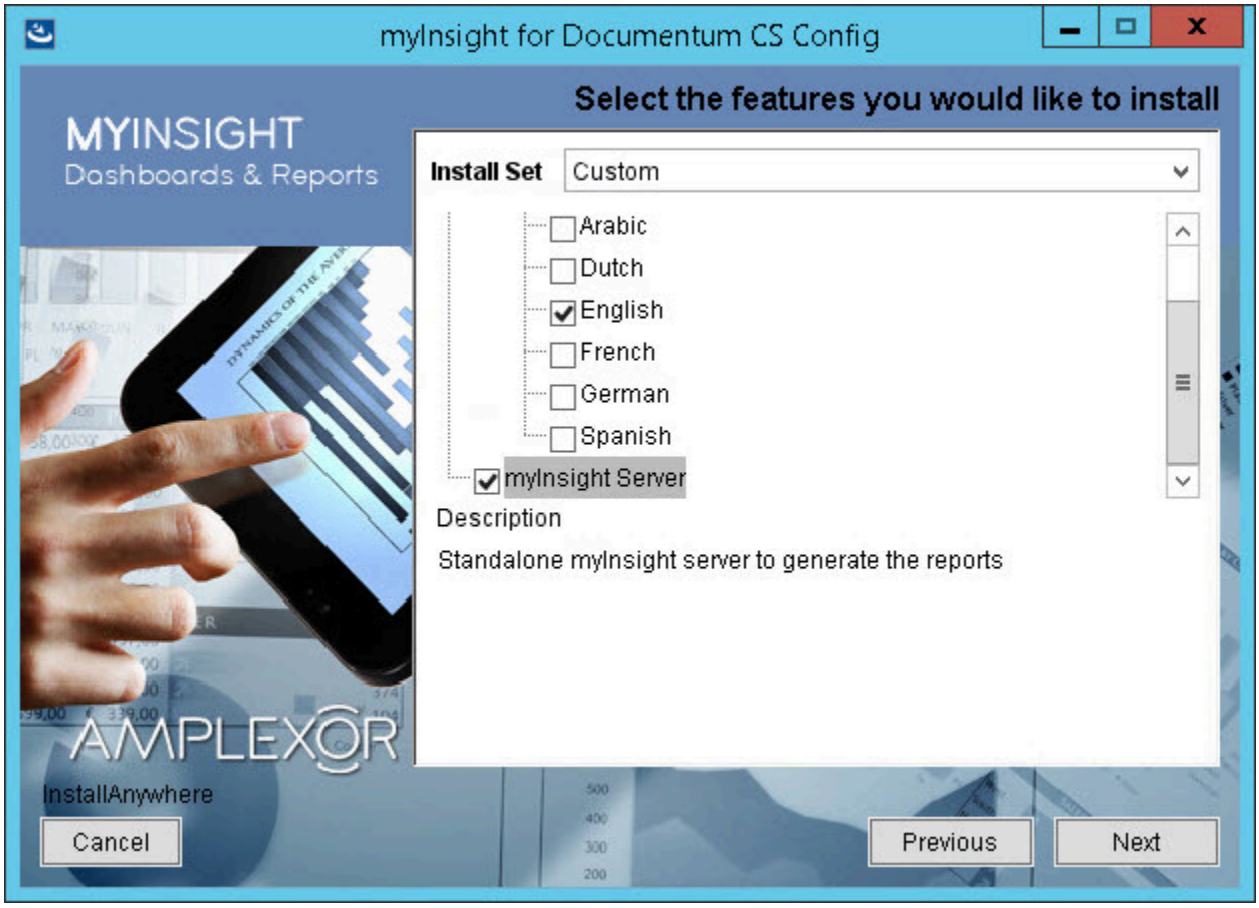

Figure 7: Selecting an installation type

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

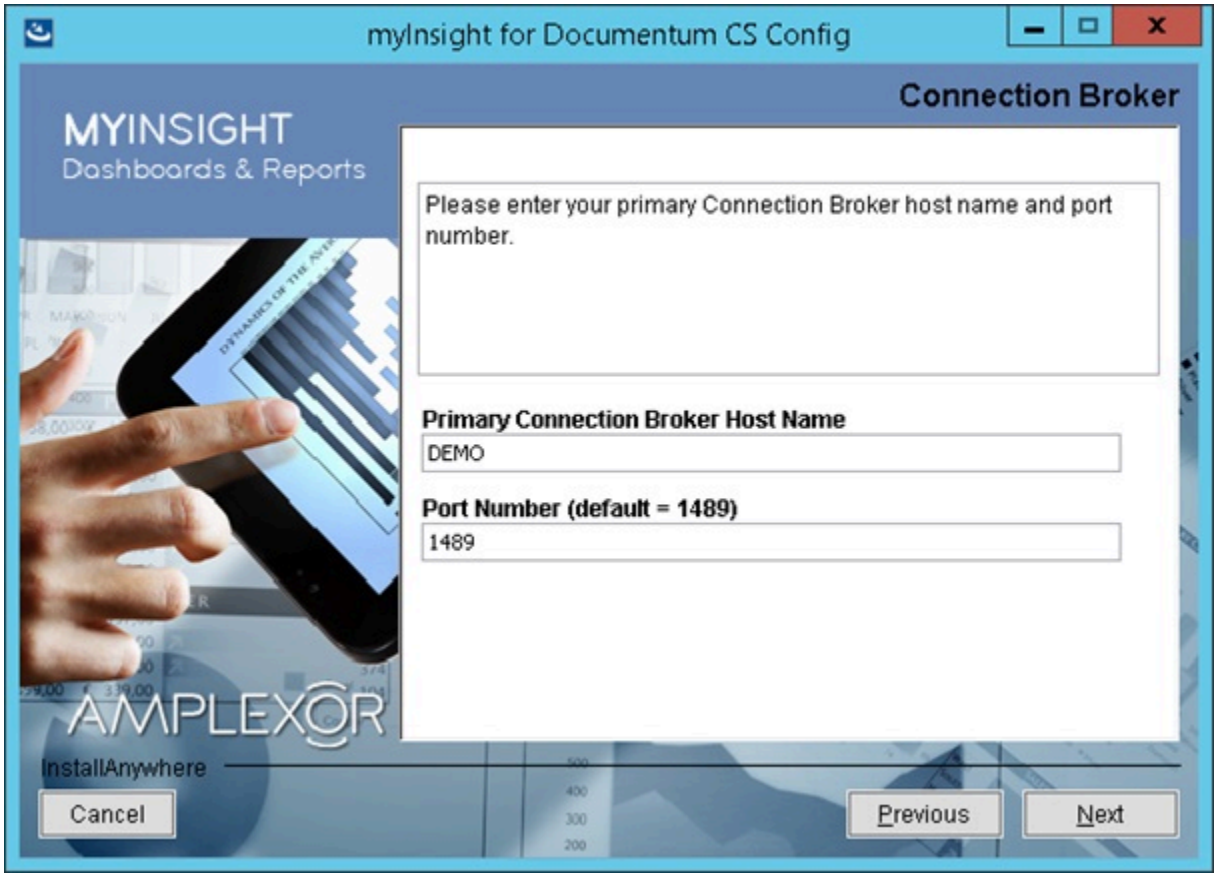

Figure 8: The Connection Broker screen

The Connection Broker information is needed to make contact with the Repository.

Please provide the host name and port number for the connection broker before continuing.

When you've provided the necessary information, click **[Next]** to continue with the installation.

or

Click **[Previous]** to go back to the Software License Agreement.

or

Click **[Cancel]** to abort the installation.

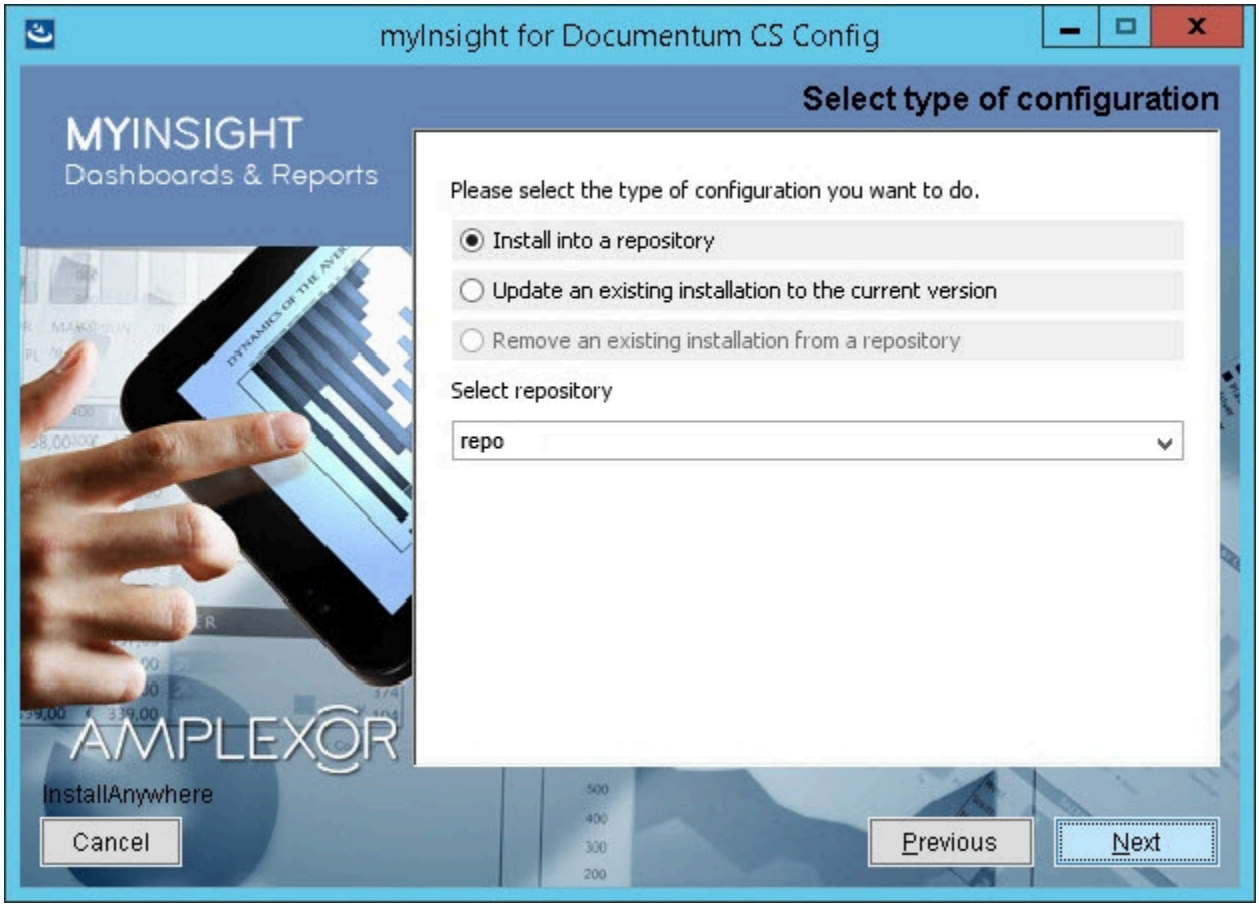

Figure 9: Selecting the repository

Select 'Install into a repository' to install a new myInsight into the repository or select 'Update an existing installation to the current version' to update an existing installation in the repository.

Select the repository in which you want to install myInsight.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 10: Specifying owner credentials

Specify the credentials (user name, password and optional the domain) for the installation owner of the selected repository.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

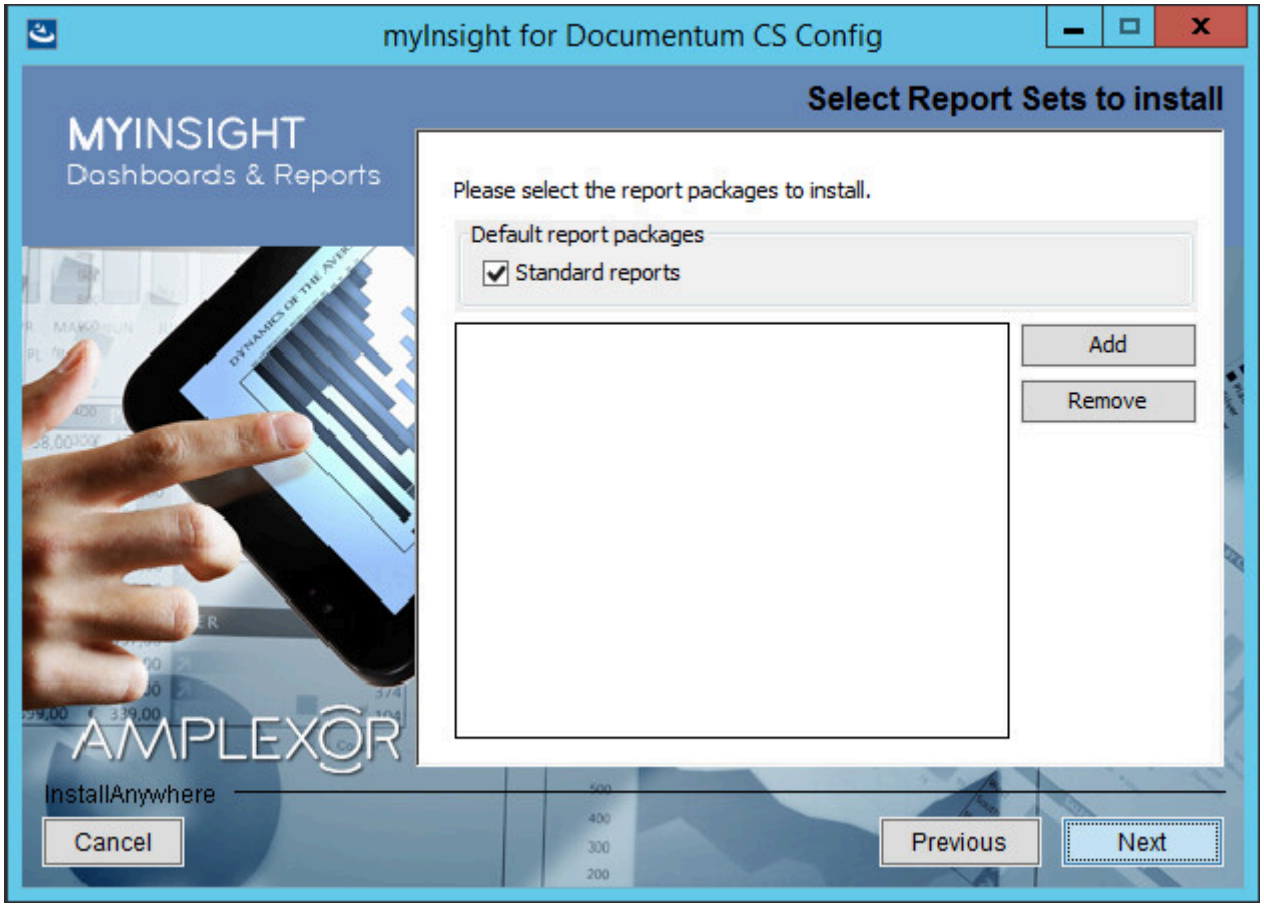

Figure 11: Importing Report Packages during installation

If the Standard reports checkbox is checked, demo reports will be included in the build.

> **Note** Importing additional Report Packages is optional. If you do not wish to add any Report Packages, press **[Next]** to continue with the installation.

Other report packages can be included by clicking **[Add]**. This will allow you to browse in a file explorer to a local Report Package .zip file. Included Report Packages can be removed by selecting the package and pressing **Remove**.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 12: Specifying the cabinet name

Type the name of the cabinet that will be used by myInsight. The default value is "myInsight".

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Caution	To avoid problems, the cabinet specified above should be used for myInsight only!

Note	If you install myInsight in multiple repositories that are all accessed with the same web application, the cabinet name MUST be the same in all repositories.

Figure 13: Specify URL to the myInsight webapplication

Type the URL to myInsight webapplication containing the resources for the graphics reports and the (D2 4.x) integration.

Make sure the users can access the URL because the demo reports will use this URL to access the resources.

The myInsight webapplication will be installed by the Web Application Configuration.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 14: Specifying the path to the license file

The location of the myInsight license file needs to be specified when there is no license file available in the repository or you selected to import a different file. When a license file is specified it will be automatically uploaded to the repository.

You can use the **[Choose]** button to navigate to the license file.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	The license file is not included in the installer. A request for a license file should be directed to AmeXio by submission of a request form. The license file will be sent by e- mail.

Note	If you didn't select the installation feature 'myInsight Server', proceed to **Figure 21** on page 28.

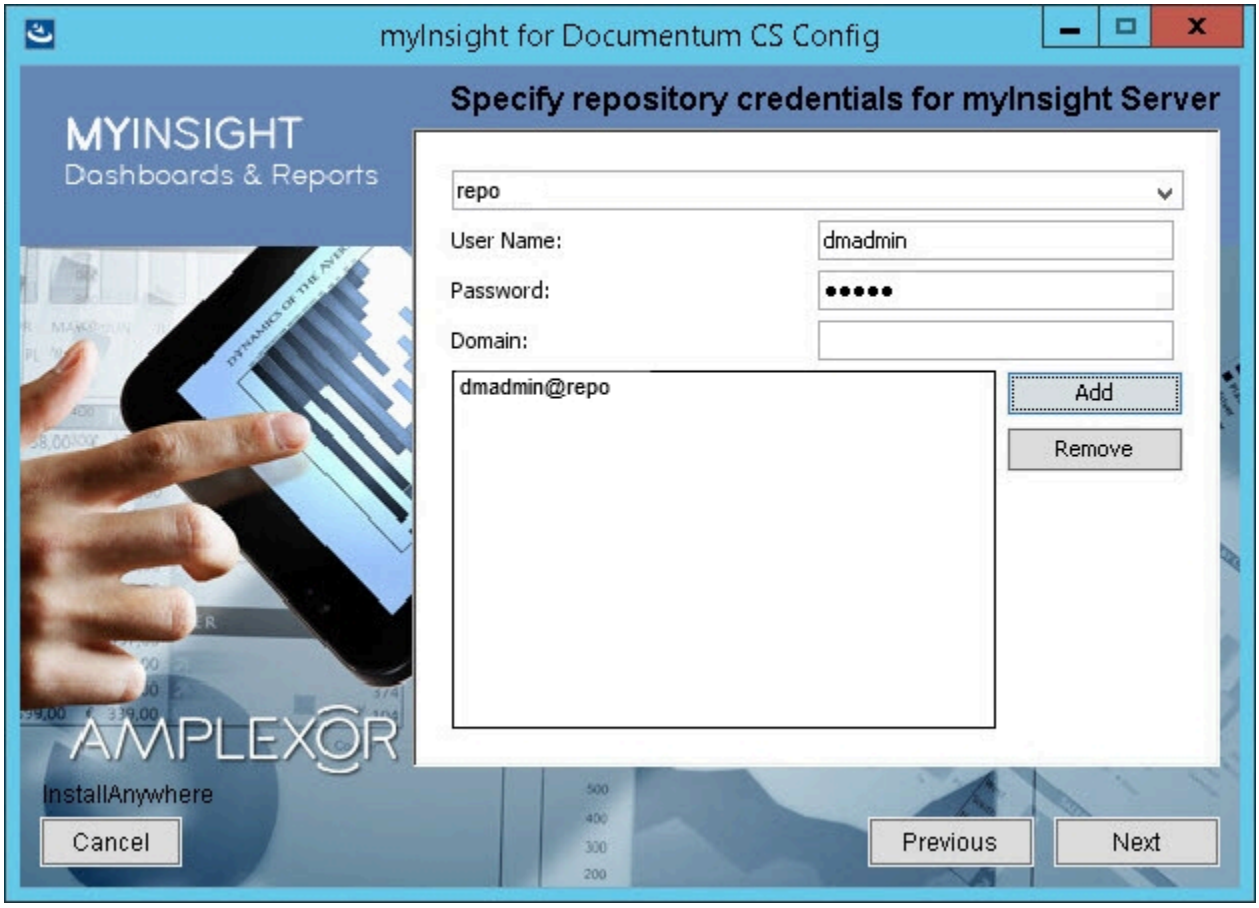

Figure 15: Standalone myInsight application server credentials

> **Note** This screen will only appear if you selected myInsight Server in the selected features screen.

In this screen you should provide credentials for the myInsight Server to connect to the repository.

Select the repository, enter the user name, password and username. Click **Add**.

Repeat for any repository/user you would like to add.

Click **[Next]** to continue with the installation, the users will be validated.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

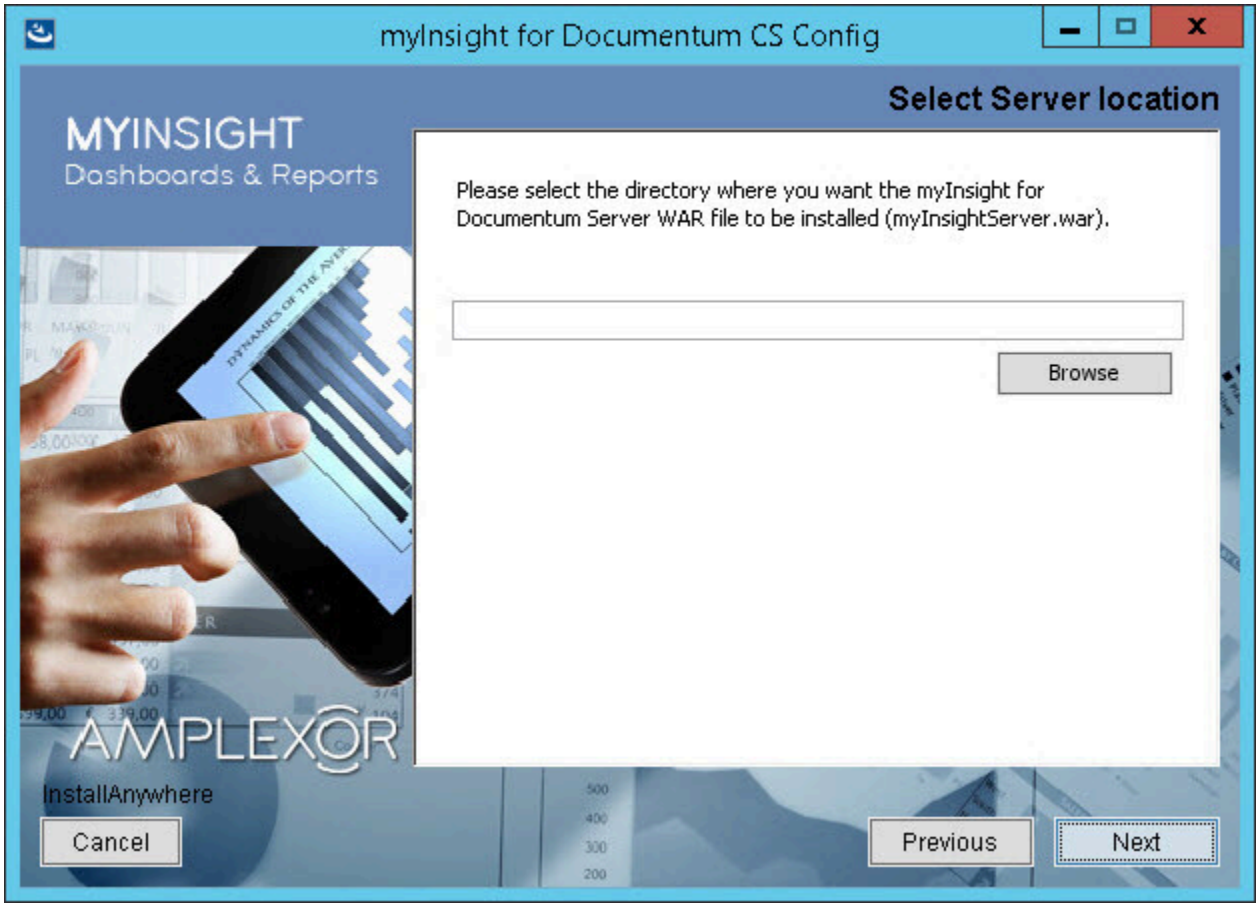

Figure 16: myInsight Server location

> **Note** This screen will only appear if you selected myInsight Server in the selected features screen.

Enter the desired path for the myInsight war installation directory.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 17: myInsight Server location

> **Note** This screen will only appear if you selected myInsight Server in the selected features screen.

Enter the directory for one of the DFS SDK, D2 REST or D2 applications and specify the path of the dfc.properties.

> **Note** If you select a DFS SDK location then the use of D2 dictionaries to translate report values is not supported.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 18: Specifying the cabinet name

Note	This screen will only appear if you selected myInsight Server in the selected features screen.

Type the name of the cabinet that will be used by myInsight. The default value is "myInsight".

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Caution	To avoid problems, the cabinet specified above should be used for myInsight only!

Note

If you install myInsight in multiple repositories that are all accessed with the same web application, the cabinet name MUST be the same in all repositories.

Figure 19: Specify the myInsight server URL and enable the configuration

Note

This screen will only appear if you selected myInsight Server in the selected features screen.

Select the checkbox 'Yes, update the configuration' if you want to activate the myInsight Server configuration.

Enter the URL of the myInsight Server, e.g. 'http://appserver:8080/myInsightServer

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 20: Stop the application server

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	This screen will only appear if you selected myInsight Server in the selected features screen.

Figure 21: The installation summary

The installation summary screen is shown, listing all details of the upcoming installation.

Click **[Continue]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

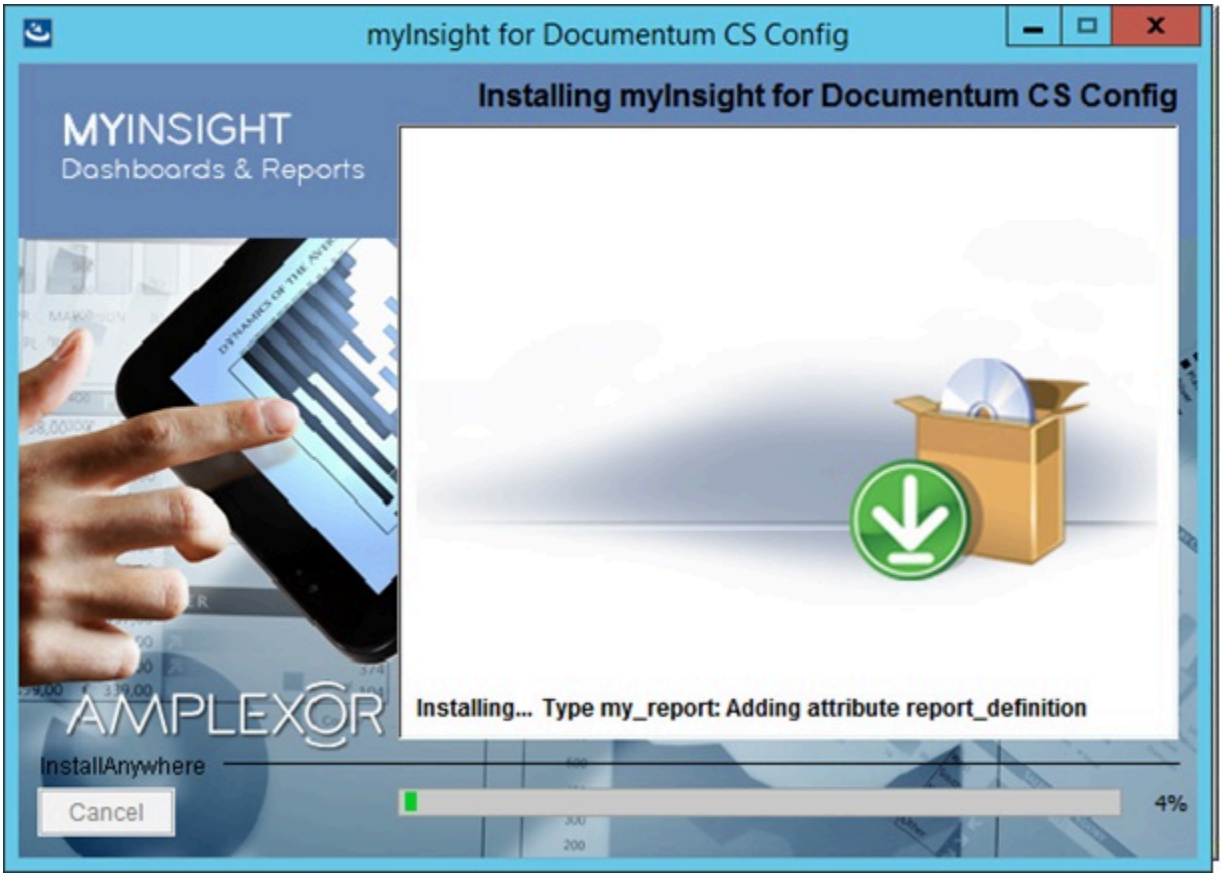

Figure 22: Installation progress

myInsight is installed into the selected repository.

Wait until the installation is completed.

Figure 23: Installation completed

When the installation is completed, a Final screen is shown.

Click **[Done]** to close the configuration program.

Check the log file (myInsight_for_Documentum_CS_Config_Install_...log), search for the block list the number of warnings and errors:

92 Successes

0 Warnings

0 NonFatalErrors

0 FatalErrors

> **Note** The amount of successes can be different for your environment.

The installation of myInsight for Documentum in one or more repositories is now complete!

3.3.4. Repository Configuration - Upgrade/Update

To upgrade a previously installed version of myInsight to the current version, you can run the installers the same way as described below but please choose the upgrade options when asked for the type of installation.

It is recommended that users do not use myInsight during the upgrade.

Note	The demo reports (any reports in the category 'Standard reports') are overwritten when you install a new version of myInsight.

Note	From versions 6.0 a different license file is needed. Please contact AmeXio Netherlands if you are upgrading from an older version and do not have the new license file. If you use myInsight with an old license file, the reports will not be generated.

Most steps are identical to the installation of myInsight (see **Repository Configuration - Installation** on page 9 for details and screenshots).

The steps which differ from the installation process, are shown below.

1. Start the Repository Configuration program.
   The program is initializing, please wait.
2. The 'Welcome Screen' is displayed.
   Click **[Next]** to continue.
3. The License agreement is displayed.
   Accept this by selecting the option "I accept the terms of the license agreement".
   Click **[Next]** to continue.
4. Connection broker details.
   Enter the hostname and port number of the connection broker.
   Click **[Next]** to continue.

Figure 24: Type of configuration

1. Select a repository and check the option "Update an existing installation to the current version".
   Click **[Next]** to continue.
2. Install owner credentials.
   Click **[Next]** to continue.
3. Installation type.
   Select one of the three types available (Typical, Custom or Full).
   Click **[Next]** to continue.

   - Features selection if custom type is chosen.
     Click **[Next]** to continue.
4. myInsight Cabinet name.
   Type the name of the cabinet that will be used by myInsight.
   Click **[Next]** to continue.
5. myInsight Webapplication URL.
   Type the URL to myInsight webapplication containing the resources for the graphics reports and the D2 4.x integration.
   Click **[Next]** to continue.

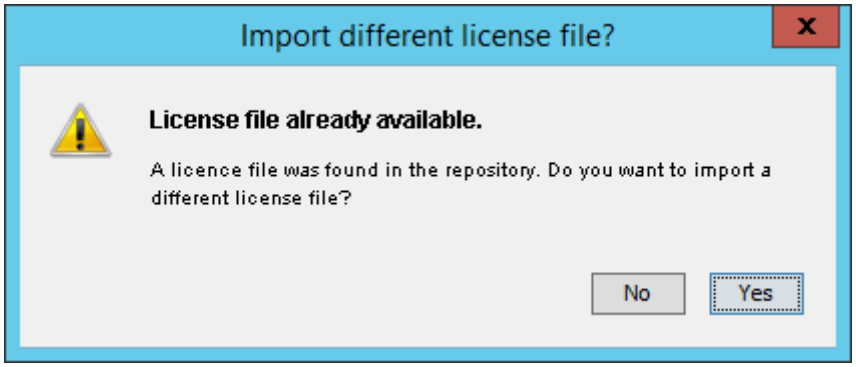

Figure 25: Existing license file found

If the installer finds an already installed license file you will get this dialog.

- Click **[No]** to keep the existing license file.
- Click **[Yes]** to import a new license file.
  Specify the location of the license file to import. Click **[Next >]** to continue

The installation summary screen is shown, listing all details of the upcoming installation.

Click the **[Continue]** button to continue with the installation.

or

Click **[Back]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

- Progress screen/bar. The installation is busy.

Please wait until the update/upgrade process is completed.

- Installation completed screen. Click the **[Done]** button to exit.

Note	Always check myInsight_for_Documentum_CS_Config_Install_...log file for errors and/or warnings.

The installation of myInsight in one or more repositories is now complete!

3.3.5. Aborting/Cancelling Installation/Update/Uninstallation

When during the installation process the **[Cancel]** button is clicked, the following confirmation screen appears.

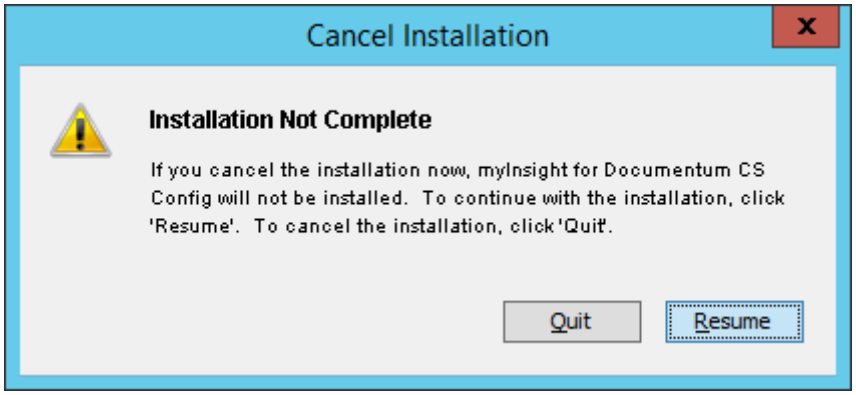

Figure 26: Cancel confirmation screen

By clicking the **[Quit]** button, you confirm the aborting/cancellation of the installer. The installer will be closed.

By clicking the **[Resume]** button, you dismiss the abortion trigger and return to the previous screen.

3.3.6. Silent/Unattended Installation

The installation software can also be executed in a silent/unattended mode.

Create a file name installer.properties and place it in the same directory as the installation software.

Fill in the following properties in the created file:

CHOSEN_ACTION	One of the following values: install – to install myInsight in a new repository update – to update an existing installation remove – to remove an existing installation

CHOSEN_FEATURE_LIST	The features to install separated by a comma. The following features are available: FeatureRepo - Install the myInsight configuration for the Repository FeatureLang_en - The English language pack (REQUIRED if you selected FeatureRepo) FeatureLang_de - The German language (only available if you selected FeaturRepo) FeatureLang_es – The Spanish language pack (only available if you selected FeaturRepo) FeatureLang_fr – The French language pack (only available if you selected FeaturRepo) FeatureLang_nl – The Dutch language pack (only available if you selected FeaturRepo) FeatureLand_ar – The Arabic language pack (only available if you selected FeaturRepo) FeatureServer – Install the myInsight Server
CHOSEN_INSTALL_FEATURE_LIST	Same as CHOSEN_FEATURE_LIST
CONNECTIONBROKER_HOST	The host name of the connection broker
CONNECTIONBROKER_PORT	The port number of the connection broker
SELECTED_REPOSITORY [1)]	The name of the repository to use
USER_NAME [1)]	The login name of the installation owner
PASSWORD [1)]	The password of the installation owner
DOMAIN [1)]	The domain of the installation owner (optional)
SELECTED_EMBEDDED_REPORTSETS [1)]	Fill in Standard Reports if you want to install the Standard Report package
SELECTED_REPORTSETS [1)]	The full path to the report set you want to import, if you don't want to import a report set don't include this parameter
CABINET_NAME	The name of the cabinet myInsight must be installed into
INCLUDE_URL [1)]	The URL to the resources for the graphical reports web application
IMPORT_LICENSE [1)]	true – to import a license file false – to not import a license file

LICENSE_FOLDER [1]	The directory on the local file system withthe license file with the trailing slash or backslash. (only used if IMPORT_LICENSE is true)
LICENSE_FILE [1]	The file name of the license file. (only used if IMPORT_LICENSE is true)
SERVER_CREDENTIALS [2]	The superuser credentials to the repositories this myInsight server is used for. Syntax: REPOSITORY_NAME,USER_NAME, USER_PASSWORD,DOMAIN To enter multiple superuser credentials separate them by the pipe character '|'.
SERVER_TARGET_DIR [2]	The full path to the folder where myInsightServer.war file should be placed.
DFS_LOCATION [2]	Full path to the DFS SDK location.
DFC_LOCATION [2]	Full path to the folder with the dfc.properties file.
CONFIG_MYINSIGHT_SERVER_URL [2]	The URL of the myInsight Server.

[1] Only if FeatureRepo is used

[2] Only if FeatureServer is used

```
CHOSEN_ACTION=install
CHOSEN_FEATURE_LIST=FeatureRepo,FeatureLanguages,FeatureLang_en
CONNECTIONBROKER_HOST=192.168.111.2
CONNECTIONBROKER_PORT=1489
SELECTED_REPOSITORY=my_Dev
USER_NAME=dmadmin
PASSWORD=mypassword
DOMAIN=
SELECTED_EMBEDDED_REPORTSETS=Standard Reports
SELECTED_REPORTSETS=C:\\Users\\dmadmin\\Desktop\\demo.zip
CABINET_NAME=myInsight
INCLUDE_URL=http://appserver:8080/myInsight
IMPORT_LICENSE=true
```

```
LICENSE_FOLDER=C:\\
LICENSE_FILE=myInsight.license
```

```
CHOSEN_ACTION=install
CHOSEN_FEATURE_LIST=FeatureServer
CONNECTIONBROKER_HOST=192.168.111.2
CONNECTIONBROKER_PORT=1489
CABINET_NAME=myInsight
SERVER_CREDENTIALS=my_Dev,dmadmin,mypassword,
SERVER_TARGET_DIR=D:\\Tomcat\\webapps
DFS_LOCATION=E:\emc-dfs-sdk-7.2
DFC_LOCATION= E:\emc-dfs-sdk-7.2\etc
CONFIG_MYINSIGHT_SERVER_URL=http://192.168.111.3:8080/myInsightServer
```

Start the installation software from the command line with the -i silent switch:
RepositoryConfiguration.exe -i silent

or

./RepositoryConfiguration.bin -i silent

These commands will complete immediately and the installation will run in the background.

Check the logfiles after the installation completes.

Note If want to you use a \ character in the installer.properties file you need to enter it twice: \\ .

3.4. Web Application Configuration - Installation

Choose your Operating System:

Operating System	Installation Program
Microsoft Windows	WebAppConfiguration.exe
Other Operating Systems	WebAppConfiguration.bin

Because the application server installer requires access to the file system of the application server, this installation must be performed by the user that runs the application server!

Note

The web application configuration, can be installed in both an expanded web application as in a single WAR file. If your web application is installed as a single WAR file, it will be unpacked in the temp directory and recreated on the original location (a backup of the original WAR file will be available too). Make sure there is enough free space in both the temp directory as in the installation directory, to contain a copy of this WAR file.

3.4.1. Microsoft Windows

Double-click the installation program "WebAppConfiguration.exe" to start the installer.

The installer starts and initializes the wizard. Please wait until its fully started and the welcome page of the installer is shown.

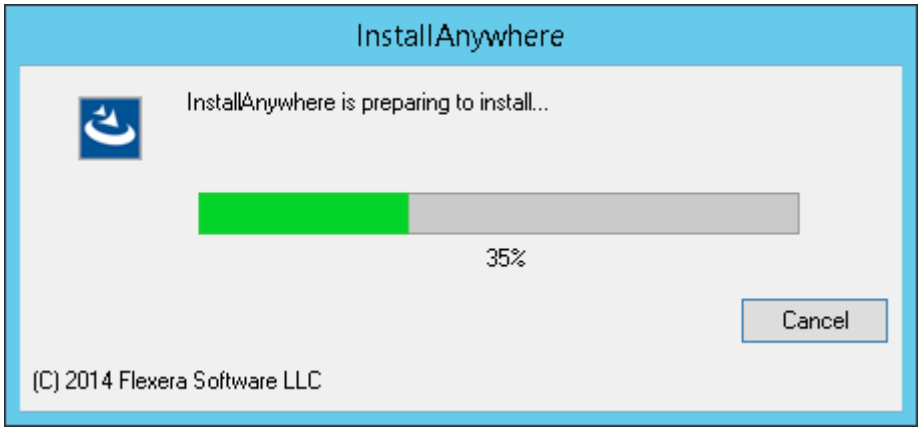

Figure 27: Initializing installer

Continue with the installation:

1. **Installation Options for Webtop or DA** on page 39
2. **Installation Options for D2 4.x** on page 51
3. **Installation Options for xCP** on page 63
4. **Installation Options for Webservice** on page 76

3.4.2. Non Microsoft Windows

Start the installation program "WebAppConfiguration.bin" by using the following command line **./WebAppConfiguration.bin**

Continue with the installation:

1. **Installation Options for Webtop or DA** on page 39
2. **Installation Options for D2 4.x** on page 51
3. **Installation Options for xCP** on page 63
4. **Installation Options for Webservice** on page 76

3.4.3. Installation Options for Webtop or DA

Figure 28: The welcome screen

The 'Welcome Screen' is displayed.

Click **[Next]** to continue with the installation.

or

Click **[Cancel]** to abort the installation.

Figure 29: The License Agreement screen

The Software License Agreement appears. Take time to read it completely, select the option "I accept the terms of the license agreement" when agreed and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go back to the Welcome screen.

or

When you don't agree with this license agreement, select the option "I do not accept the terms of the license agreement" and you can't continue with the installation. Click **[Cancel]** to abort the installation.

Figure 30: Selecting the type of configuration

Select the configuration type "Install or update into an existing webapplication" and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 31: Selecting an installation type

Note If you're installing for Webtop you can also select languages to install.

Select "Webtop/Administrator integration" and **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

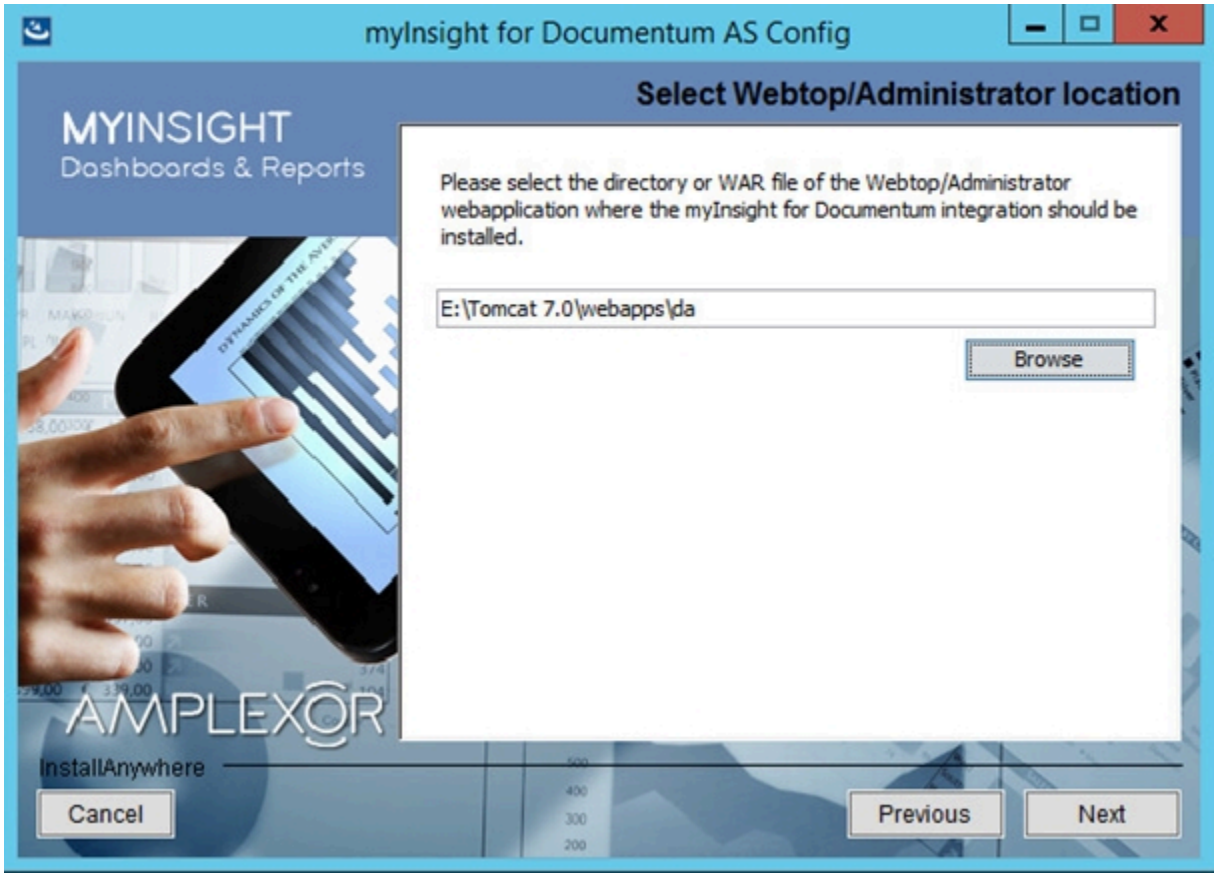

Figure 32: Select the webapplication installation directory

The application server screen appears, asking the location of the webtop / DA application myInsight should be installed in.

Figure 33: Specify separate resources and target directory

Select if you want to install the resources application for the graphical reports.

Enter the directory where you want to install the resources application. A .war file named myInsight.war will be installed at this location. The URL to this application needs to be entered during the installation on the content server

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	myInsight integration for D2 4.x application is also named myInsight.war and also contains the resources for the graphical reports. Do not install the resources for the graphical reports application if you are also installing myInsight integration for D2 4.x on the same server.

Note	The following screen is only shown if you have checked the box earlier to include additional resources.

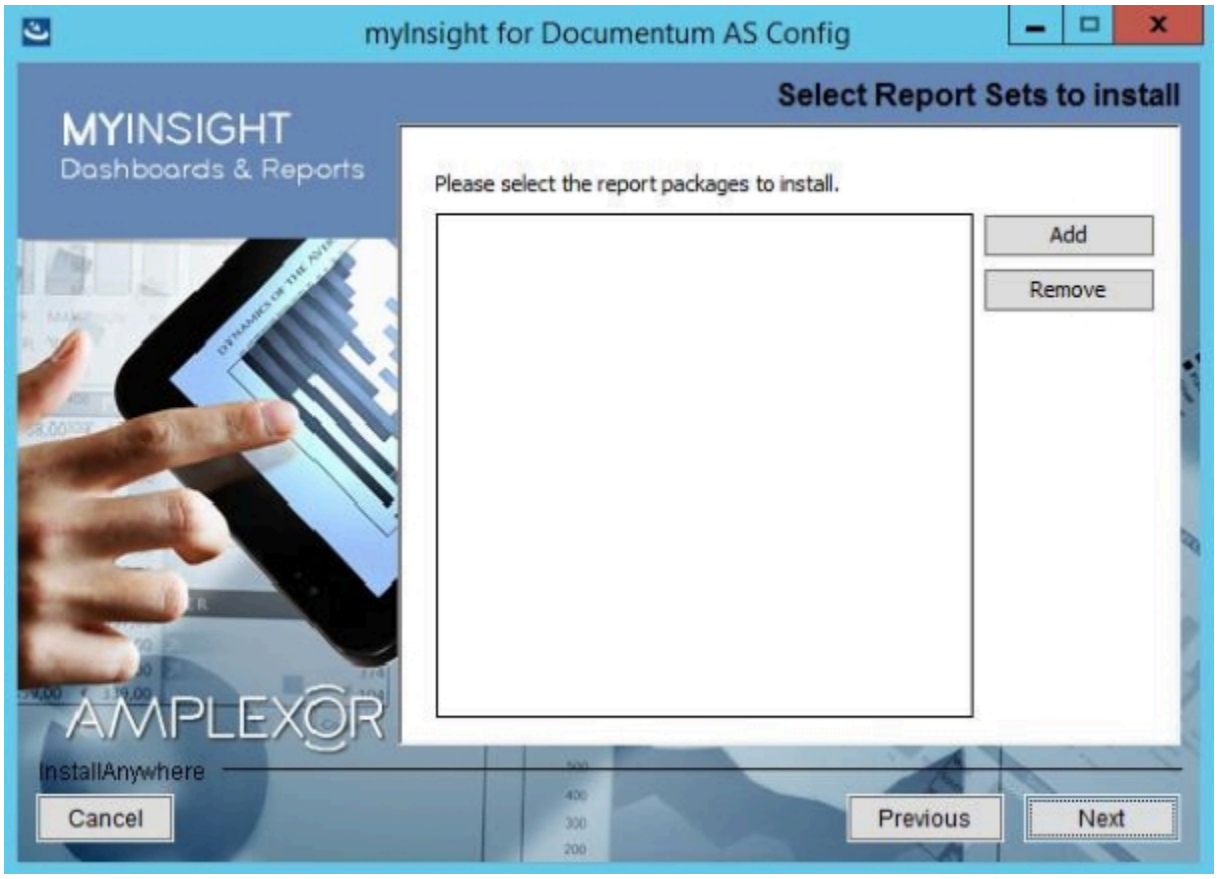

Figure 34: Selecting Report Packages to import

Note	Importing additional Report Packages is optional. If you do not wish to add any Report Packages, press **[Next]** to continue with the installation.

Other report packages can be included by clicking **[Add]**. This will allow you to browse in a file explorer to a local Report Package .zip file. Included Report Packages can be removed by selecting the package and pressing **Remove**.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

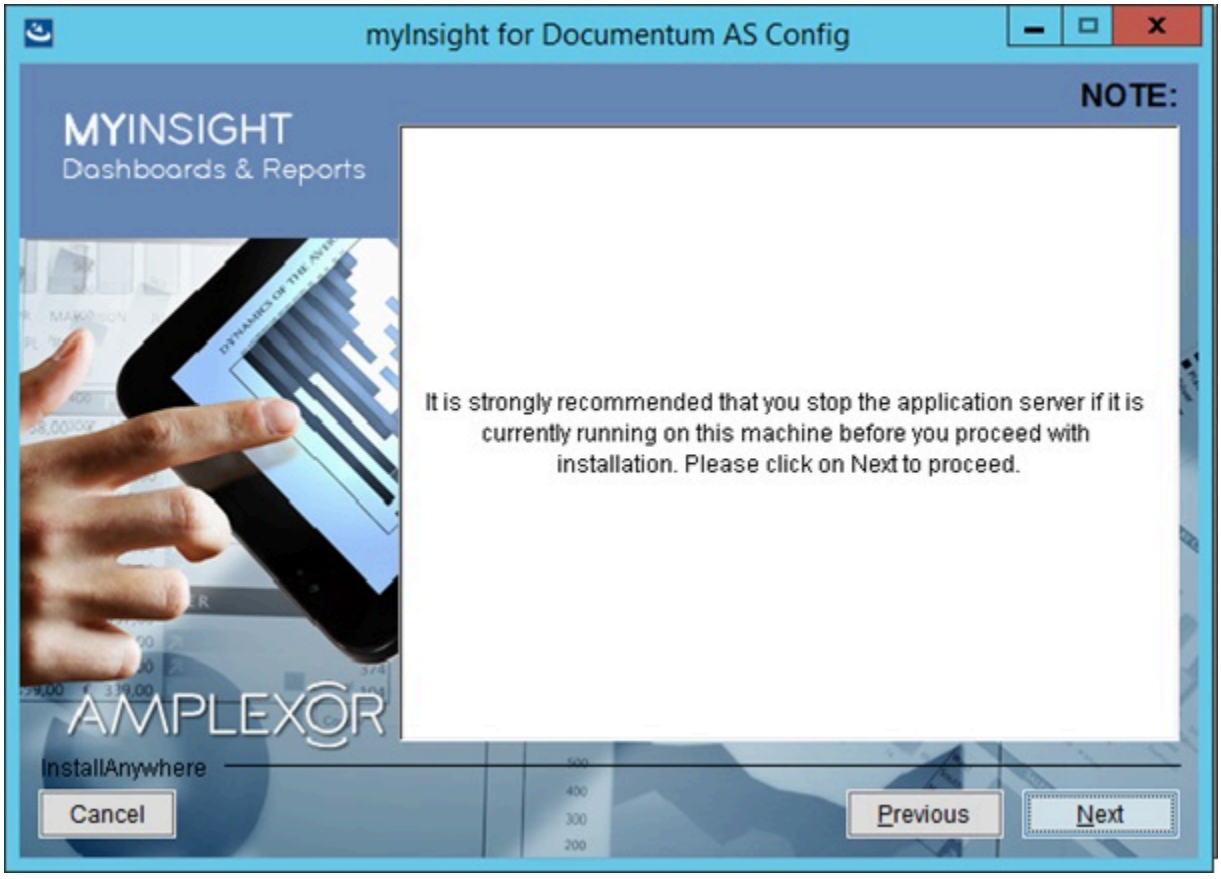

Figure 35: Recommendation to stop the application server

A recommendation screen appears, asking to stop the used application server.

If this server is still running, stop the application server and continue here.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** button to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	The application server must NOT be running during the installation. If it is still running, stop it first.

Figure 36: Specifying the cabinet name

Type the name of the cabinet that will be used by myInsight. The default value is "myInsight".

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Caution	To avoid problems, the cabinet specified above should be used for myInsight only!

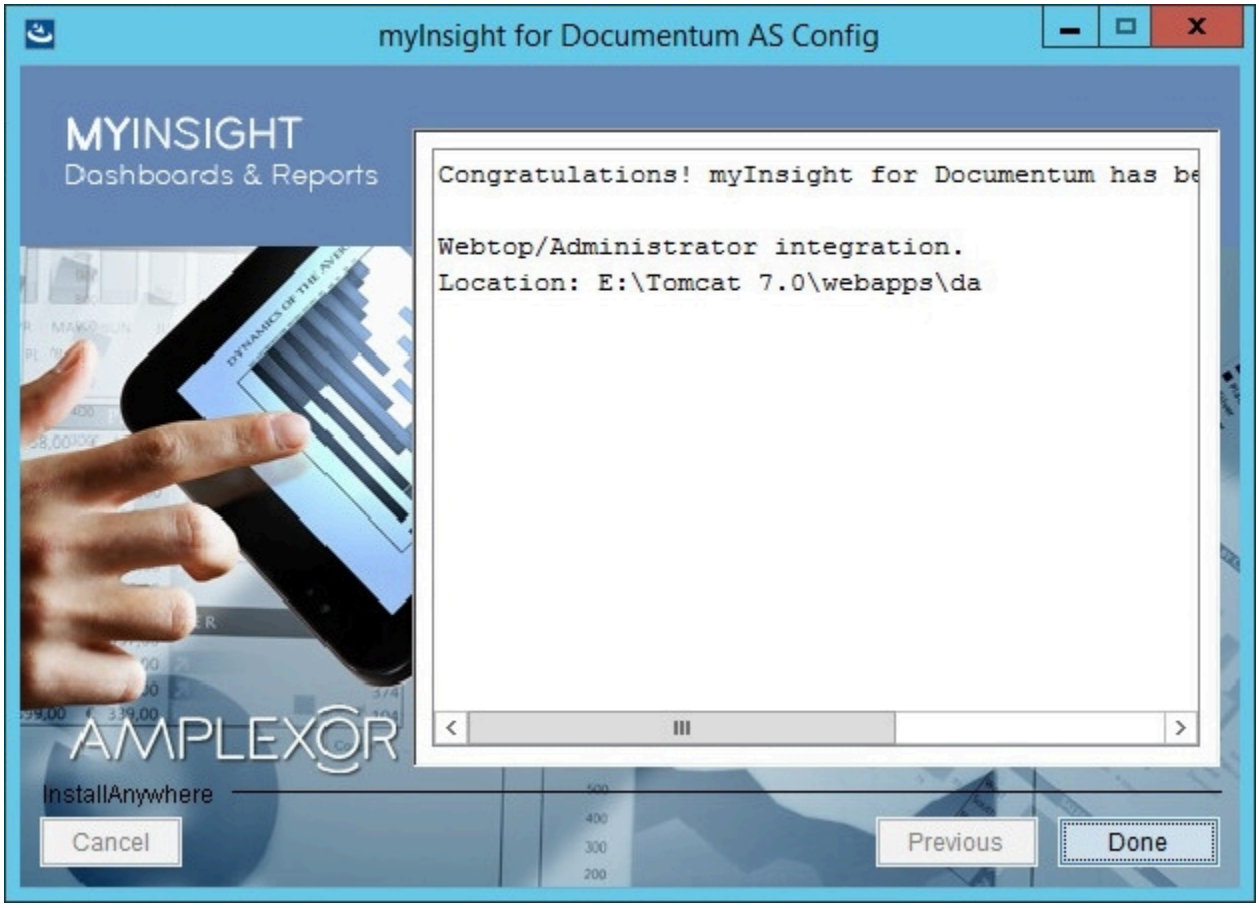

Figure 37: The installation summary

The installation summary screen is shown, listing all details of the upcoming installation.

Click **[Continue]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

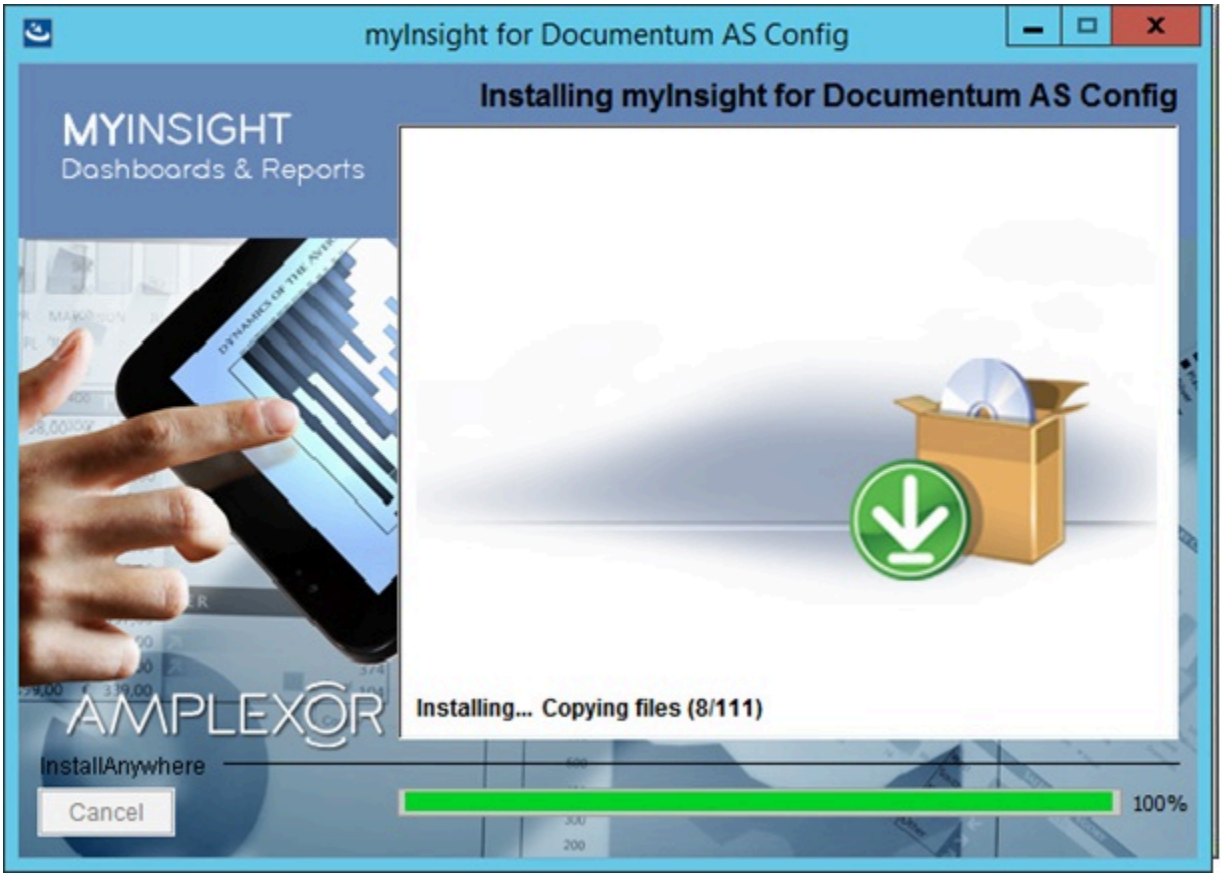

Figure 38: Installation progress

myInsight is installed into the selected location.

Wait until the installation is completed.

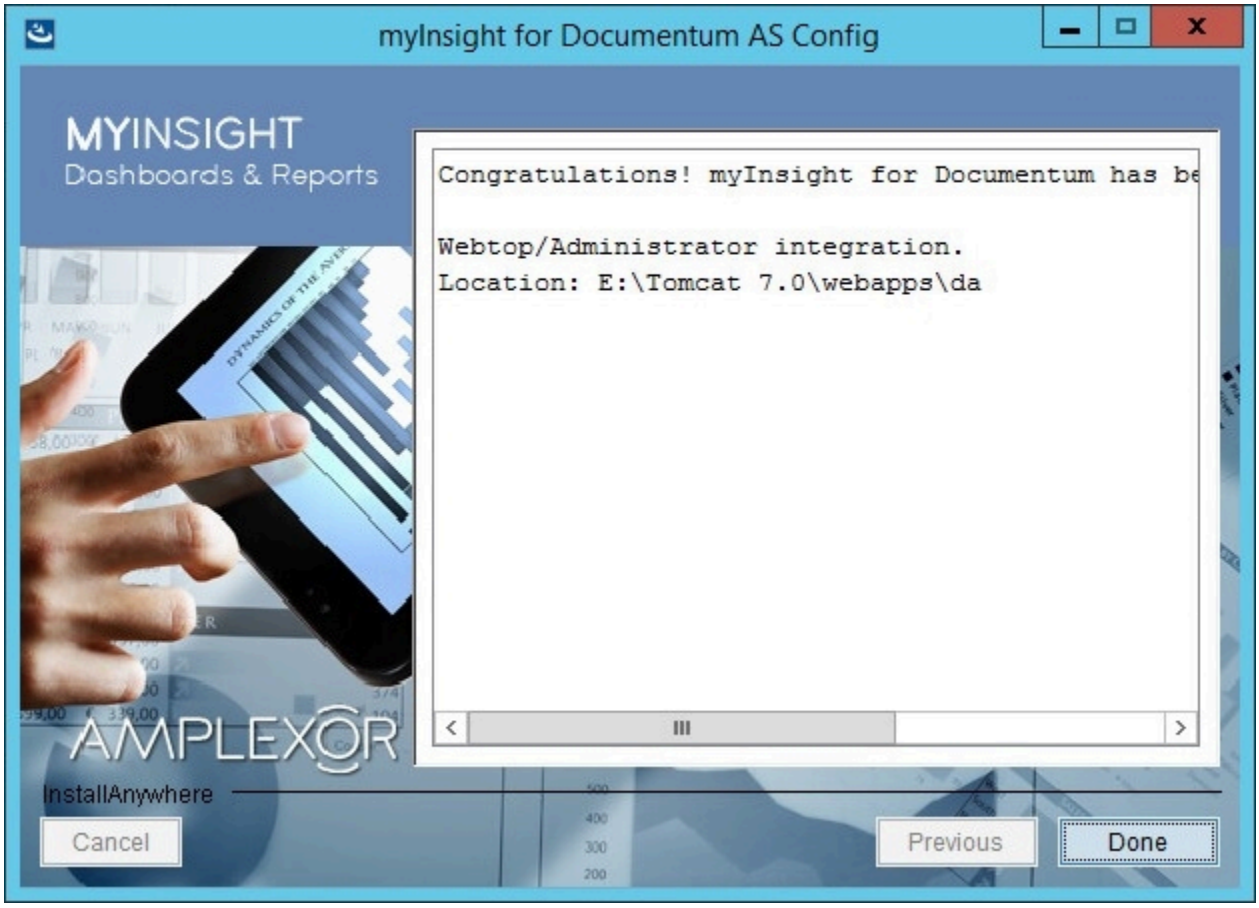

Figure 39: Installation completed

When the installation is completed, a final screen is shown.

Click **[Done]** to close the configuration program.

Check the log file (myInsight_for_Documentum_AS_Config_Install_...log), search for the block list the number of warnings and errors:

1599 Successes
0 Warnings
0 NonFatalErrors
0 FatalErrors

> **Note** The amount of successes can be different for your environment.

The installation of myInsight in one or more web applications is now complete!

3.4.4. Installation Options for D2 4.x

Figure 40: The welcome screen

The 'Welcome Screen' is displayed.

Click **[Next]** to continue with the installation.

or

Click **[Cancel]** to abort the installation.

Figure 41: The License Agreement screen

The Software License Agreement appears. Take time to read it completely, select the option "I accept the terms of the license agreement" when agreed and

click **[Next]** to continue with the installation.

or

Click **[Previous]** to go back to the Welcome screen.

or

When you don't agree with this license agreement, select the option "I do not accept the terms of the license agreement" and you can't continue with the installation. Click **[Cancel]** to abort the installation.

Figure 42: Selecting the type of configuration

Select the configuration type "Install or update into an existing webapplication" and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 43: Selecting an installation type

Select the D2 4.x application and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 44: Select the .war installation directory

The application server screen appears, asking for the location where the WAR file has to be installed.

Provide the complete path to the deployment directory of your webapp server.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Provide the complete path to the D2 War file.

Figure 45: Provide the path to the D2 .war file

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

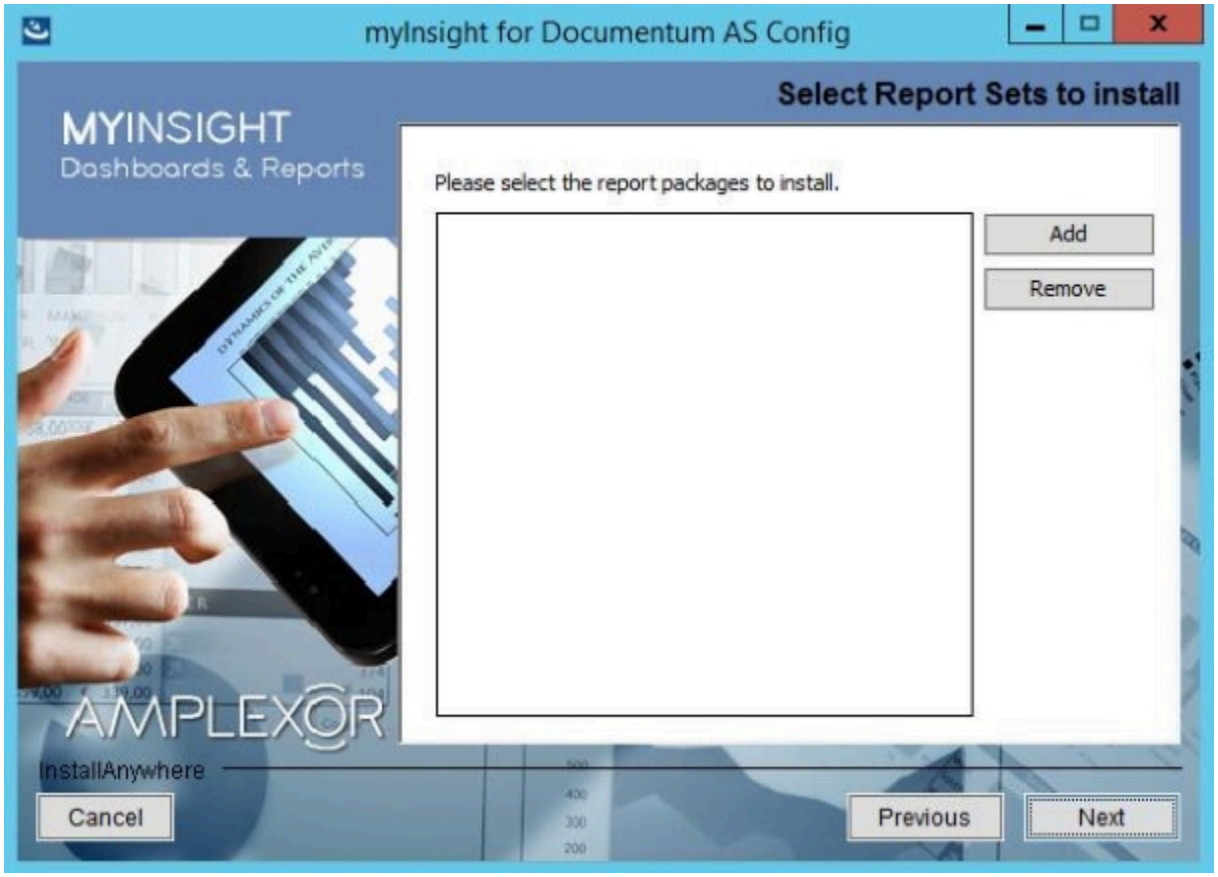

Figure 46: Selecting Report Packages to import

> **Note** Importing additional Report Packages is optional. If you do not wish to add any Report Packages, press **[Next]** to continue with the installation.

Other report packages can be included by clicking **[Add]**. This will allow you to browse in a file explorer to a local Report Package .zip file. Included Report Packages can be removed by selecting the package and pressing **Remove**.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

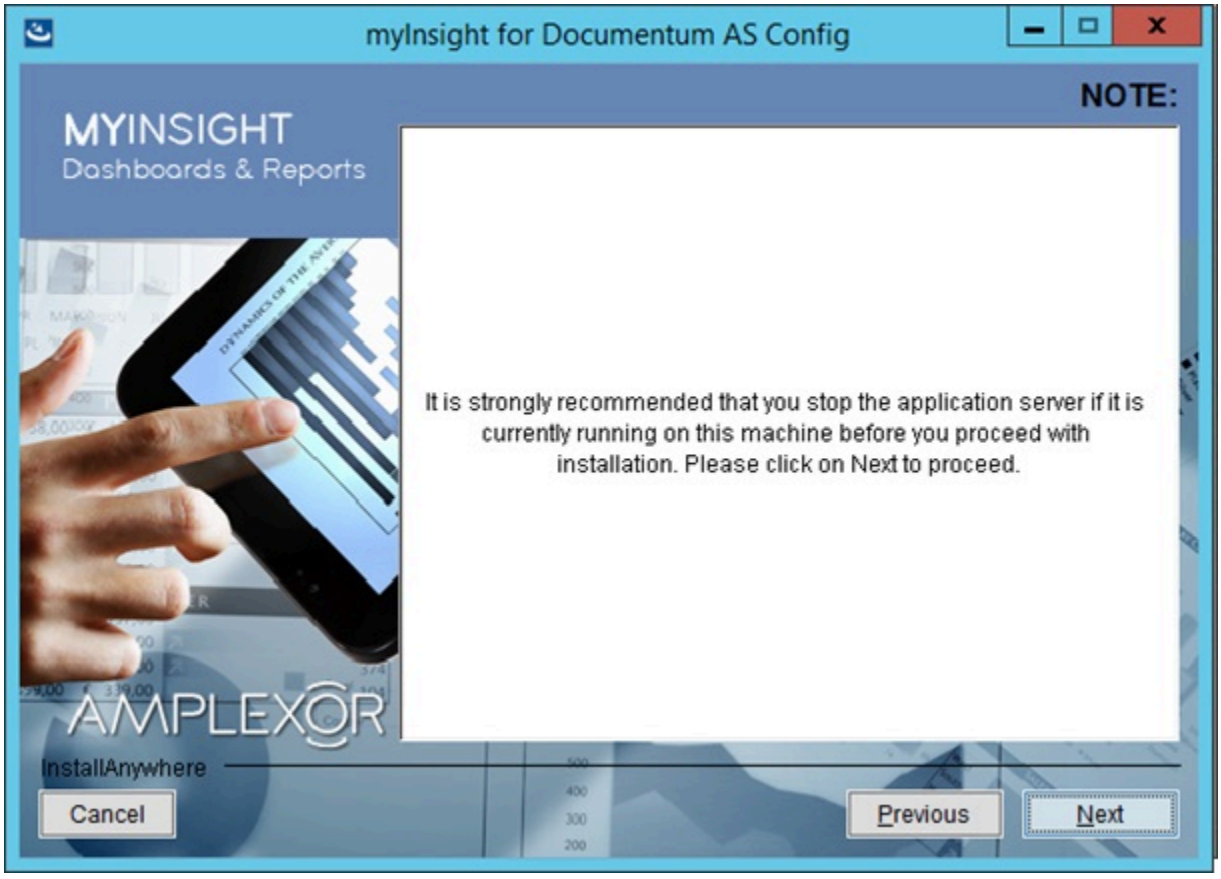

Figure 47: Recommendation to stop the application server

A recommendation screen appears, asking to stop the used application server.

If this server is still running, stop the application server and continue here.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** button to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	The application server must NOT be running during the installation. If it is still running, stop it first.

Figure 48: Specifying the cabinet name

Type the name of the cabinet that will be used by myInsight. The default value is "myInsight".

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

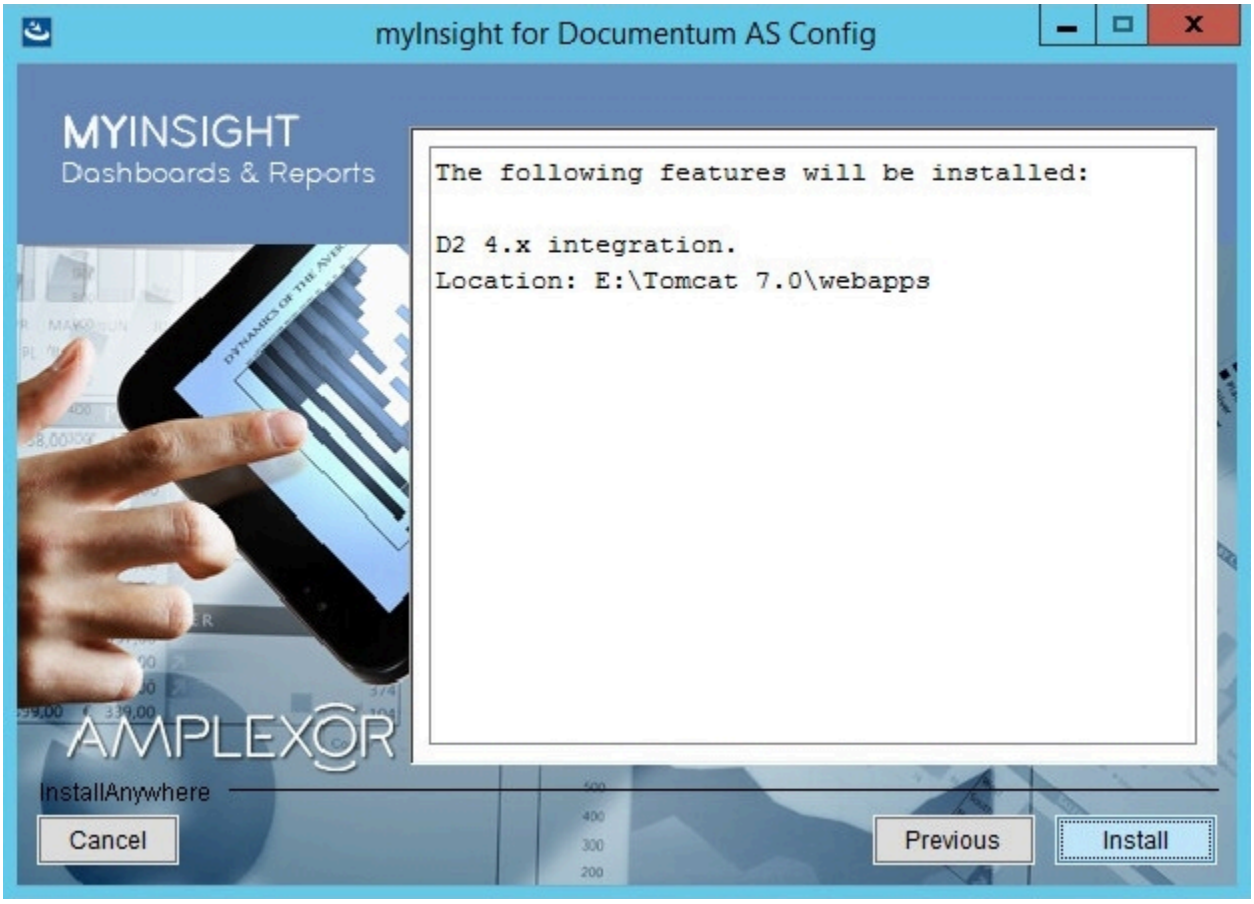

Figure 49: The installation summary

The installation summary screen is shown, listing all details of the upcoming installation.

Click **[Continue]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

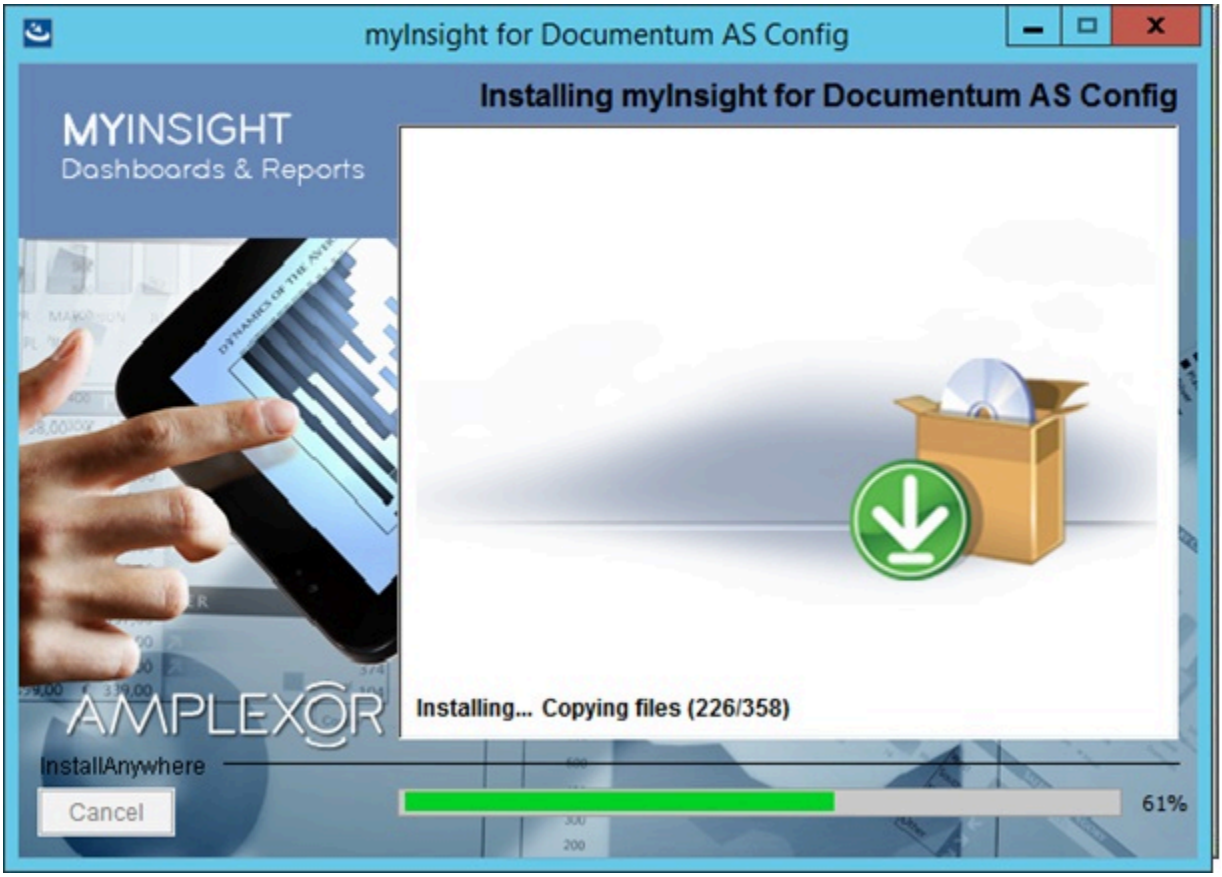

Figure 50: Installation progress

myInsight is installed into the selected location.

Wait until the installation is completed.

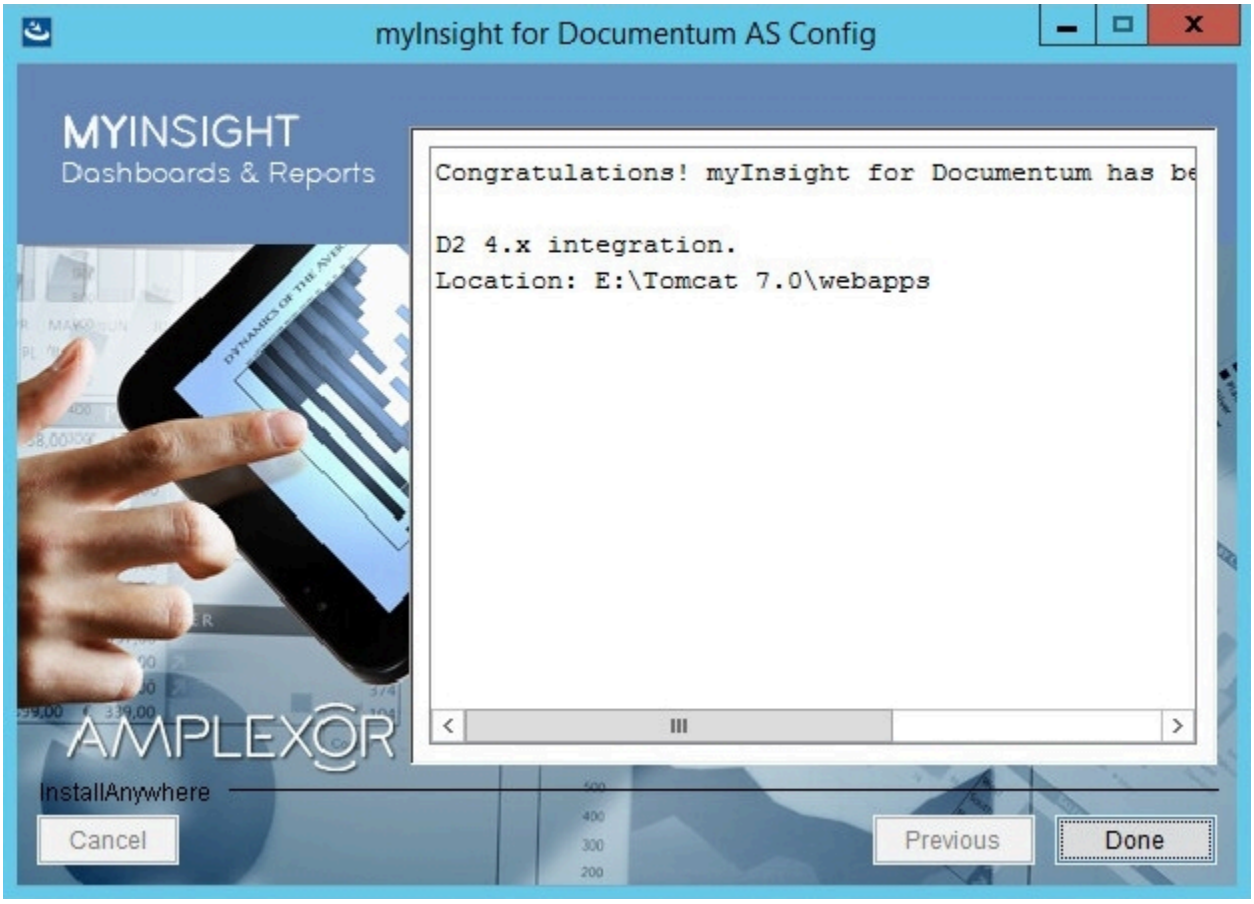

Figure 51: Installation completed

When the installation is completed, a final screen is shown.

Click **[Done]** to close the configuration program.

Check the log file (myInsight_for_Documentum_AS_Config_Install_...log), search for the block list the number of warnings and errors:

1599 Successes

0 Warnings

0 NonFatalErrors

0 FatalErrors

> **Note** The amount of successes can be different for your environment.

The installation of myInsight in one or more web applications is now complete!

Note

If you are installing myInsight on a webserver with Tomcat 8.0.x, you will need to edit the 'catalina.properties' file. See **Configuring Tomcat for myInsight in D2** on page 96.

3.4.5. Installation Options for xCP

Figure 52: The welcome screen

The 'Welcome Screen' is displayed.

Click **[Next]** to continue with the installation.

or

Click **[Cancel]** to abort the installation.

Figure 53: The License Agreement screen

The Software License Agreement appears. Take time to read it completely, select the option "I accept the terms of the license agreement" when agreed and

click **[Next]** to continue with the installation.

or

Click **[Previous]** to go back to the Welcome screen.

or

When you don't agree with this license agreement, select the option "I do not accept the terms of the license agreement" and you can't continue with the installation. Click **[Cancel]** to abort the installation.

Figure 54: Selecting the type of configuration

Select the configuration type "Install or update into an existing webapplication" and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 55: Selecting an installation type

Select the xCP Integration and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 56: Select the .war installation directory

The application server screen appears, asking for the location where the WAR file has to be installed.

Provide the complete path to the deployment directory of your webapp server.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Provide the complete path to the xCP War file.

Figure 57: Provide the path to the xCP .war file

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Provide the complete path to the DFS SDK and the dfc.properties file.

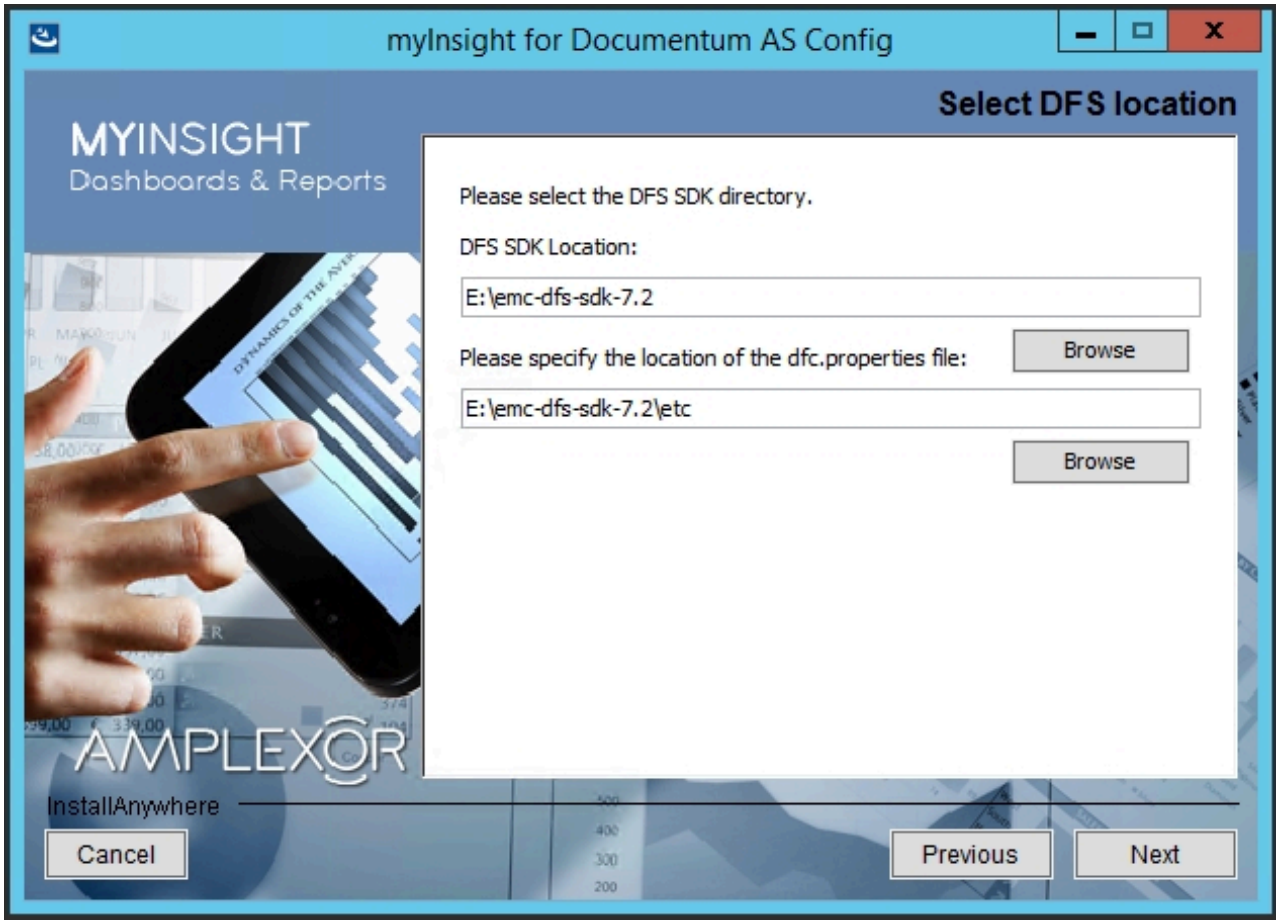

Figure 58: Provide the path to the DFS SDK and the dfc.properties file

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

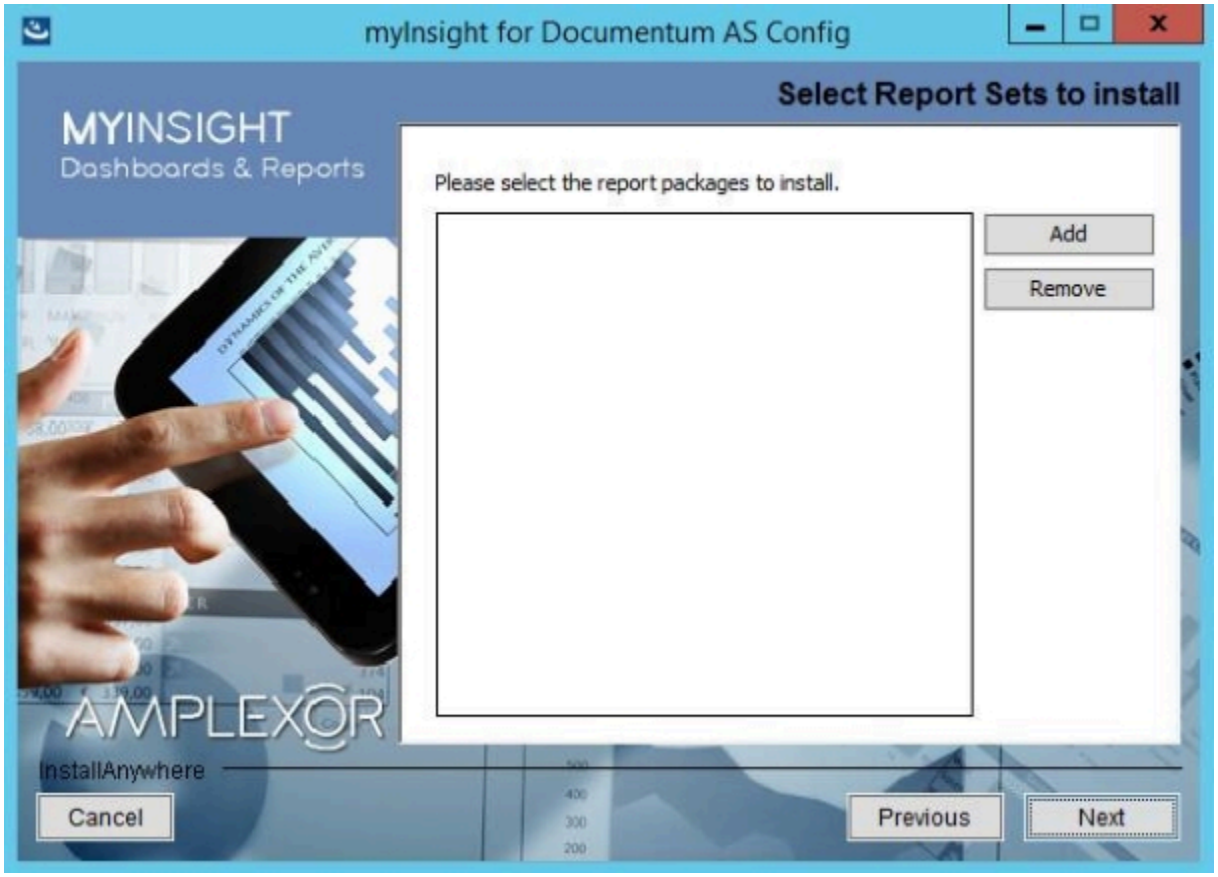

Figure 59: Selecting Report Packages to import

Note	Importing additional Report Packages is optional. If you do not wish to add any Report Packages, press **[Next]** to continue with the installation.

Other report packages can be included by clicking **[Add]**. This will allow you to browse in a file explorer to a local Report Package .zip file. Included Report Packages can be removed by selecting the package and pressing **Remove**.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

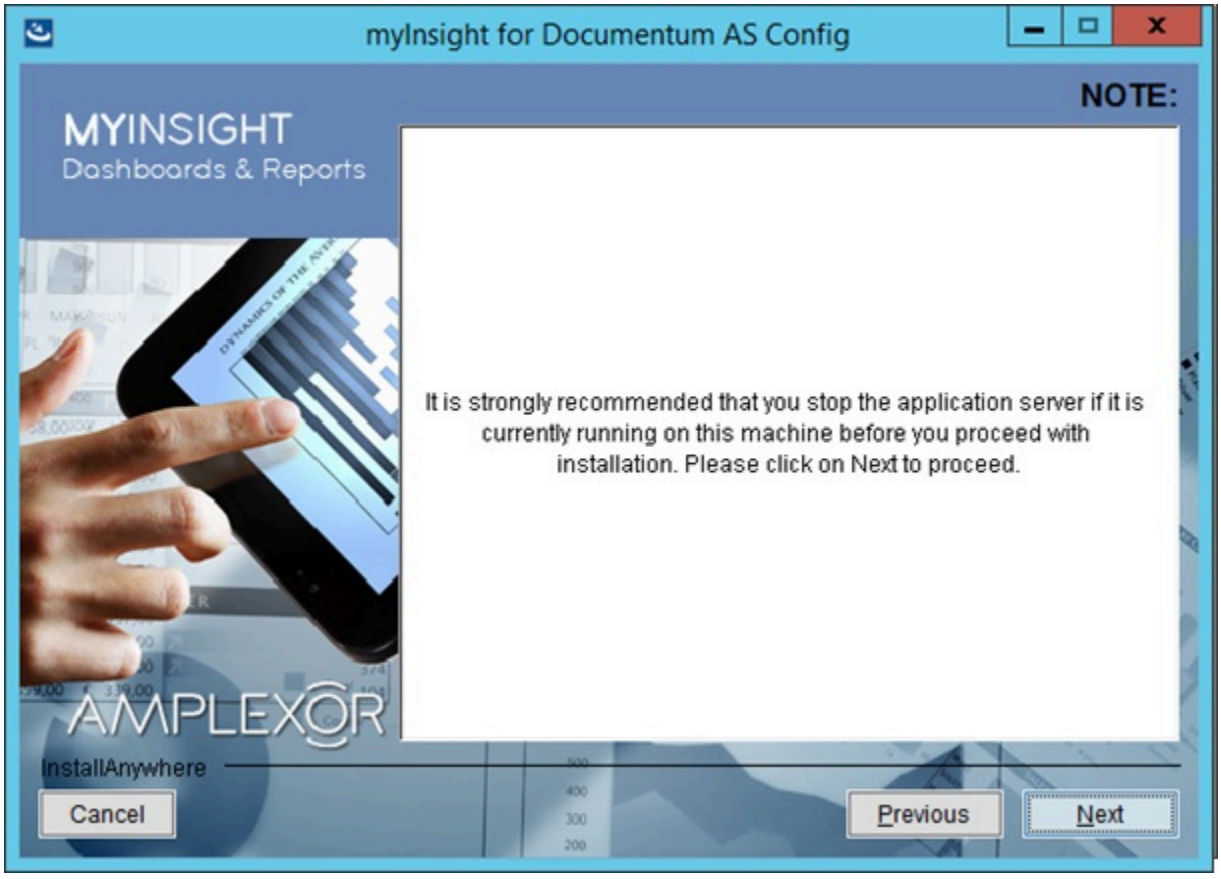

Figure 60: Recommendation to stop the application server

A recommendation screen appears, asking to stop the used application server.

If this server is still running, stop the application server and continue here.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** button to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	The application server must NOT be running during the installation. If it is still running, stop it first.

Figure 61: Specifying the cabinet name

Type the name of the cabinet that will be used by myInsight. The default value is "myInsight".

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

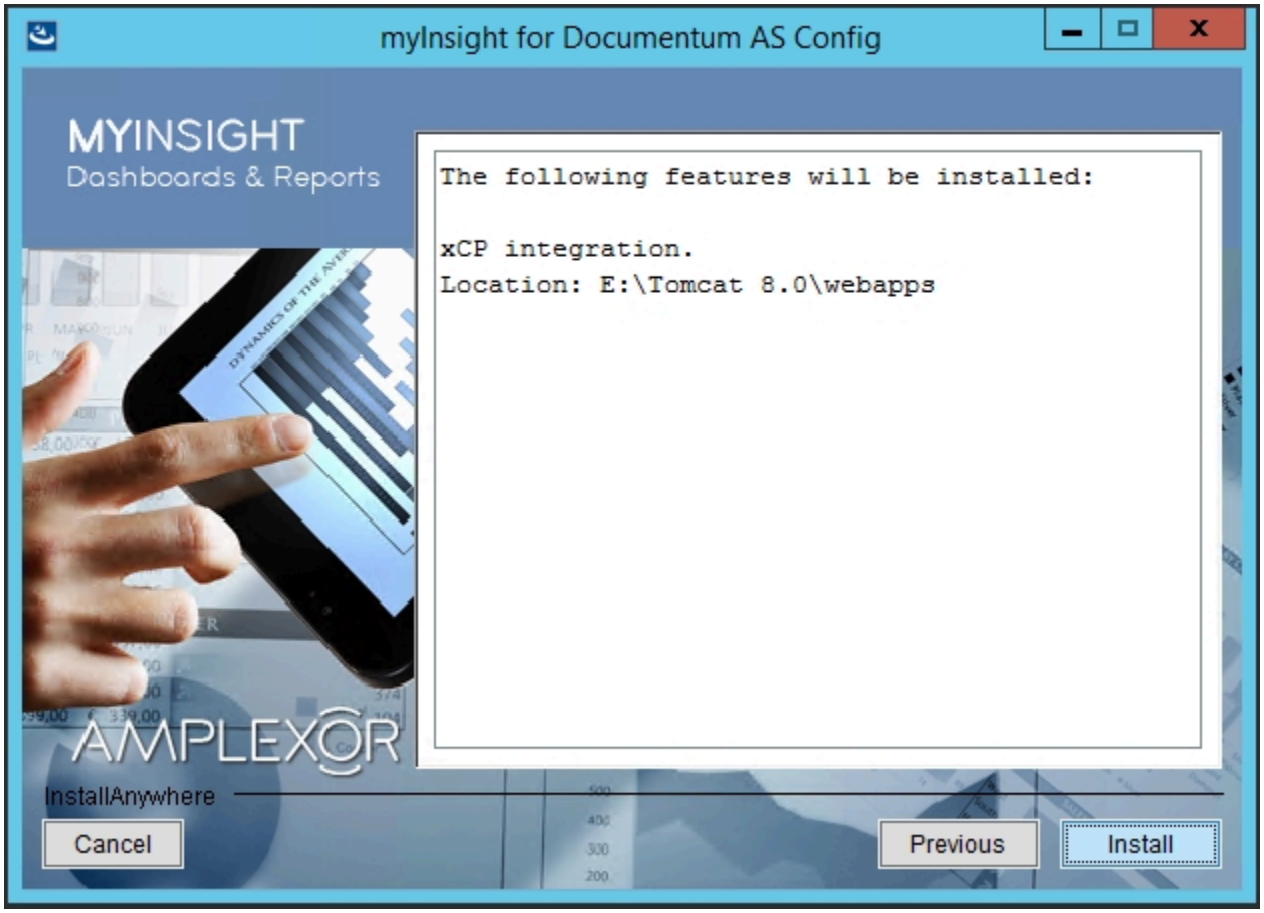

Figure 62: The installation summary

The installation summary screen is shown, listing all details of the upcoming installation.

Click **[Continue]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

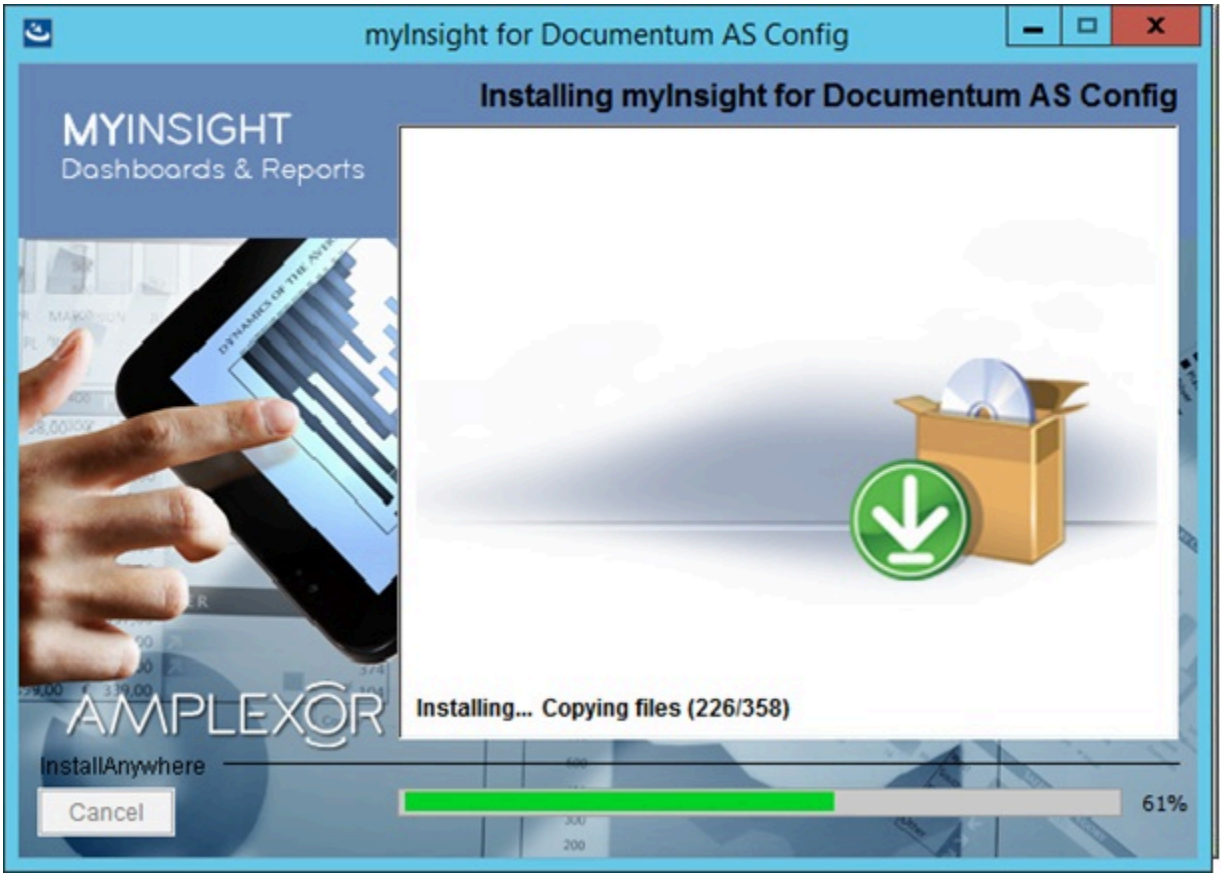

Figure 63: Installation progress

myInsight is installed into the selected location.

Wait until the installation is completed.

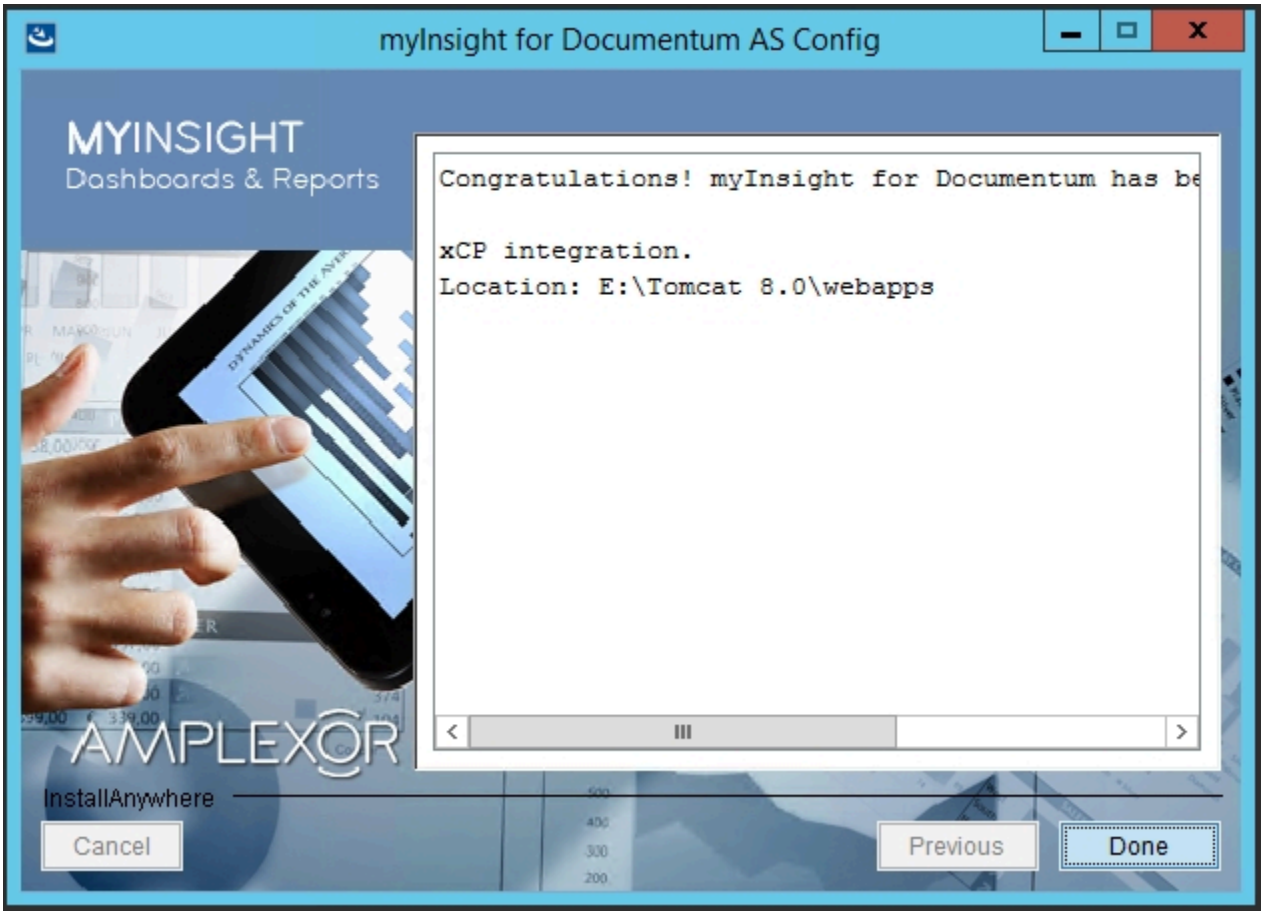

Figure 64: Installation completed

When the installation is completed, a final screen is shown.

Click **[Done]** to close the configuration program.

Check the log file (myInsight_for_Documentum_AS_Config_Install_...log), search for the block list the number of warnings and errors:

1599 Successes

0 Warnings

0 NonFatalErrors

0 FatalErrors

> **Note** The amount of successes can be different for your environment.

The installation of myInsight in one or more web applications is now complete!

Note

If you are installing myInsight on a webserver with Tomcat 8.0.x, you will need to edit the 'catalina.properties' file. See **Configuring Tomcat for myInsight in D2** on page 96.

3.4.6. Installation Options for Webservice

Figure 65: The welcome screen

The 'Welcome Screen' is displayed.

Click **[Next]** to continue with the installation.

or

Click **[Cancel]** to abort the installation.

Figure 66: The License Agreement screen

The Software License Agreement appears. Take time to read it completely, select the option "I accept the terms of the license agreement" when agreed and

click **[Next]** to continue with the installation.

or

Click **[Previous]** to go back to the Welcome screen.

or

When you don't agree with this license agreement, select the option "I do not accept the terms of the license agreement" and you can't continue with the installation. Click **[Cancel]** to abort the installation.

Figure 67: Selecting the type of configuration

Select the configuration type "Install or update into an existing webapplication" and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 68: Selecting the Webservice installation option

Select themyInsight Webservice and click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

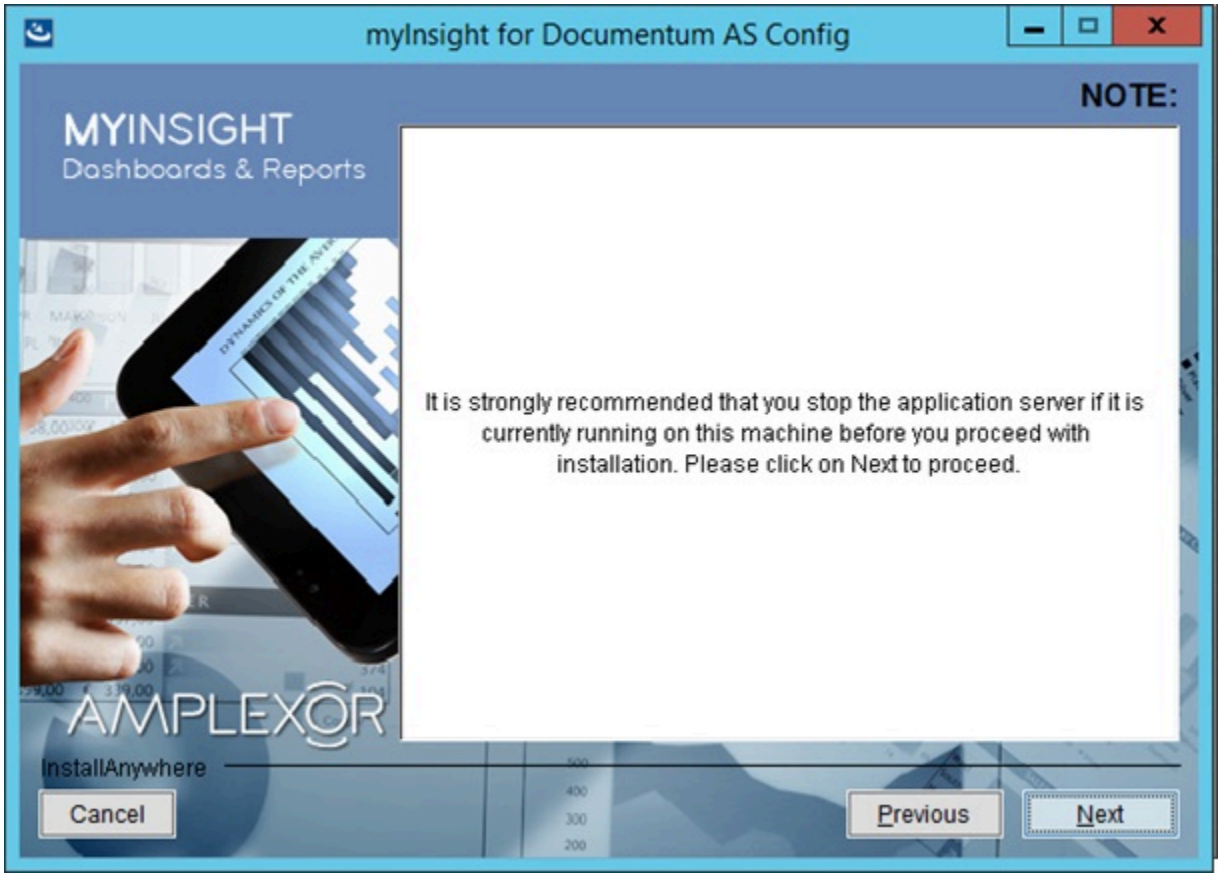

Figure 69: Recommendation to stop the application server

A recommendation screen appears, asking to stop the used application server.

If this server is still running, stop the application server and continue here.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** button to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	The application server must NOT be running during the installation. If it is still running, stop it first.

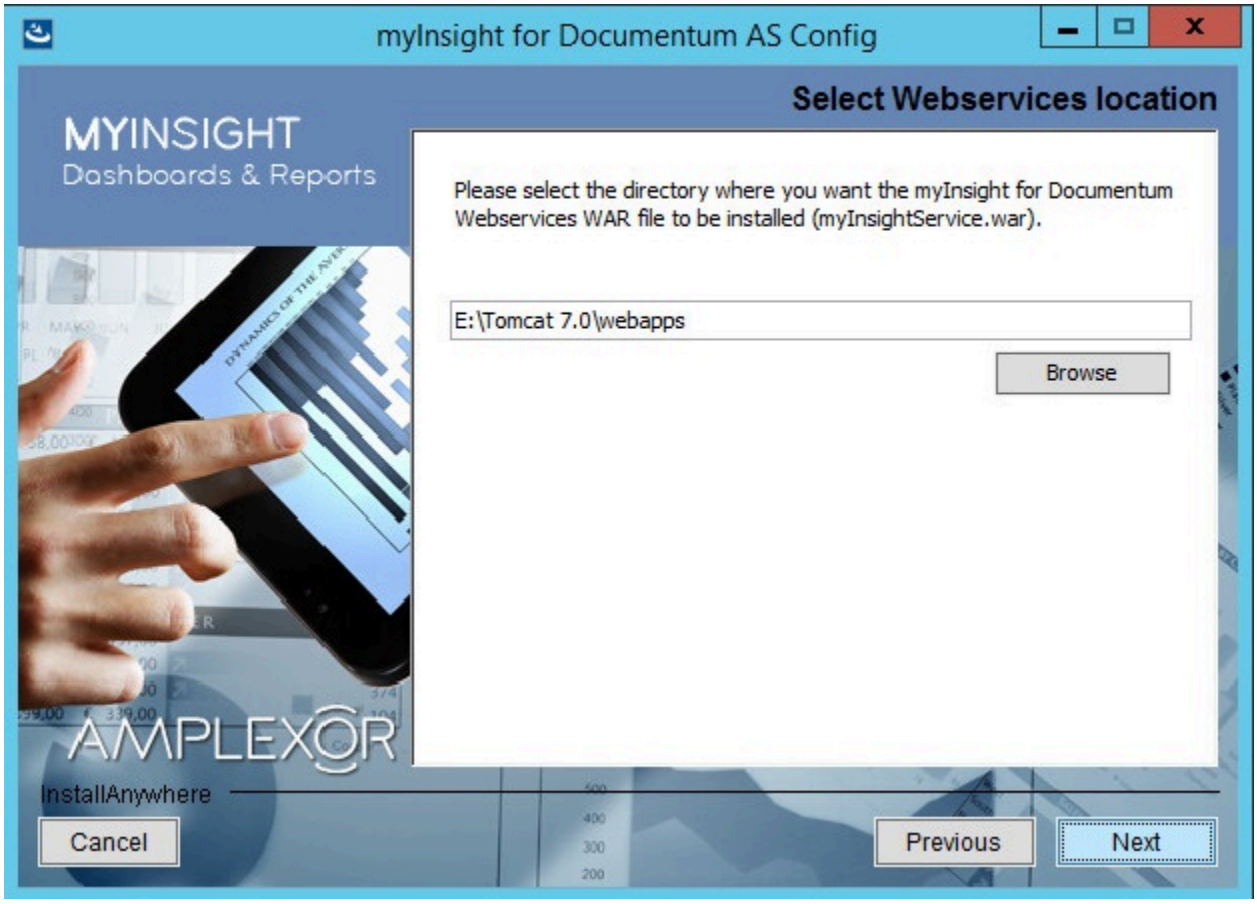

Figure 70: Select the .war installation directory

The application server screen appears, asking for the location where the WAR file has to be installed.

Provide the complete path to the deployment directory of your webapp server.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 71: Provide the directory path for the Documentum DFS installation

The Documentum DFS directory selection appears, asking for the location where Documentum DFS is installed.

Click **[Choose...]** to browse to the path to the deployment directory of Documentum DFS.

or

Click **[Restore Default]** to revert the directory selection back to the default directory path of Documentum DFS

then

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

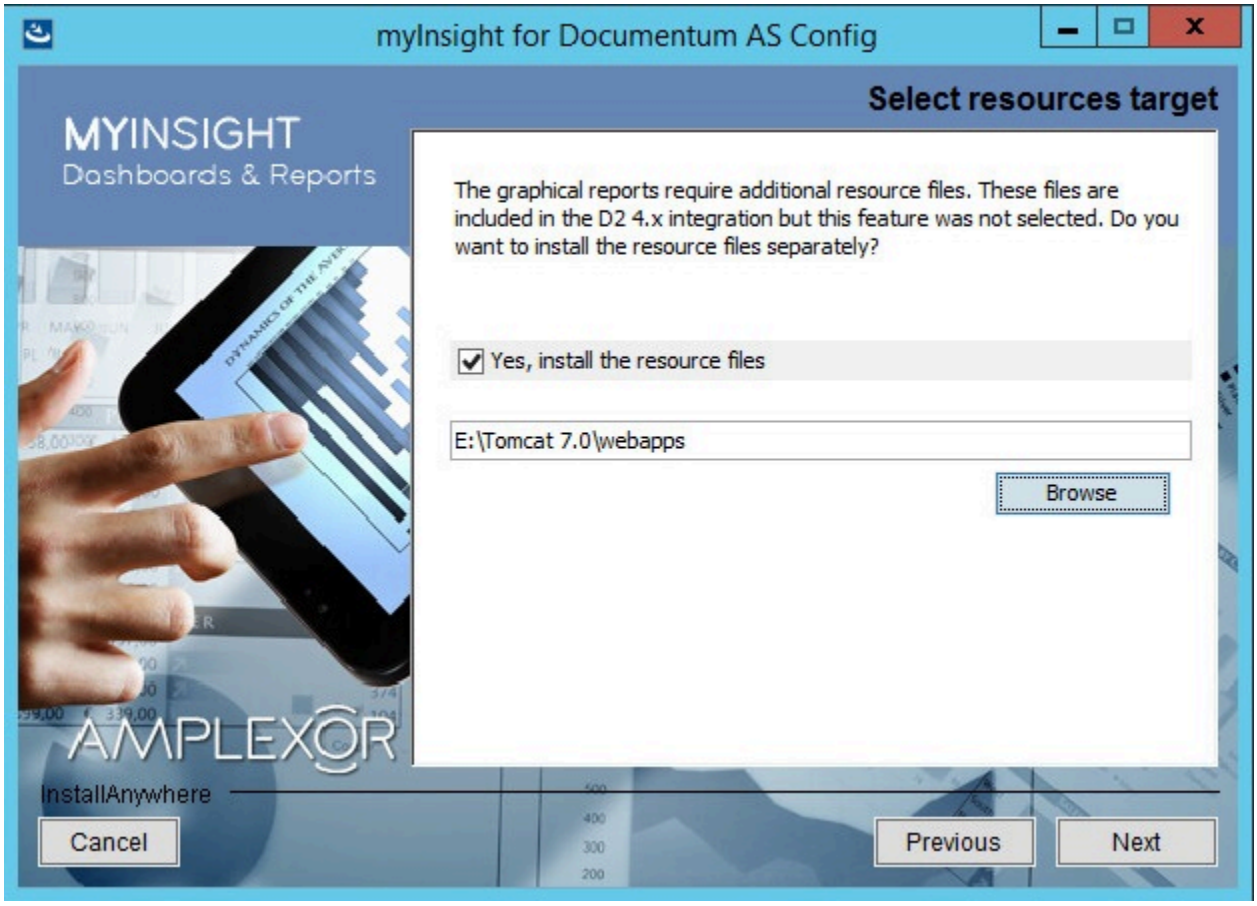

Figure 72: Specify separate resources and target directory

Select if you want to install the resources application for the graphical reports.

Enter the directory where you want to install the resources application. A .war file named myInsight.war will be installed at this location. The URL to this application needs to be entered during the installation on the content server

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Note	myInsight integration for D2 4.x application is also named myInsight.war and also contains the resources for the graphical reports. Do not install the resources for the graphical reports application if you are also installing myInsight integration for D2 4.x on the same server.

Note

The following screen is only shown if you have checked the box earlier to include additional resources.

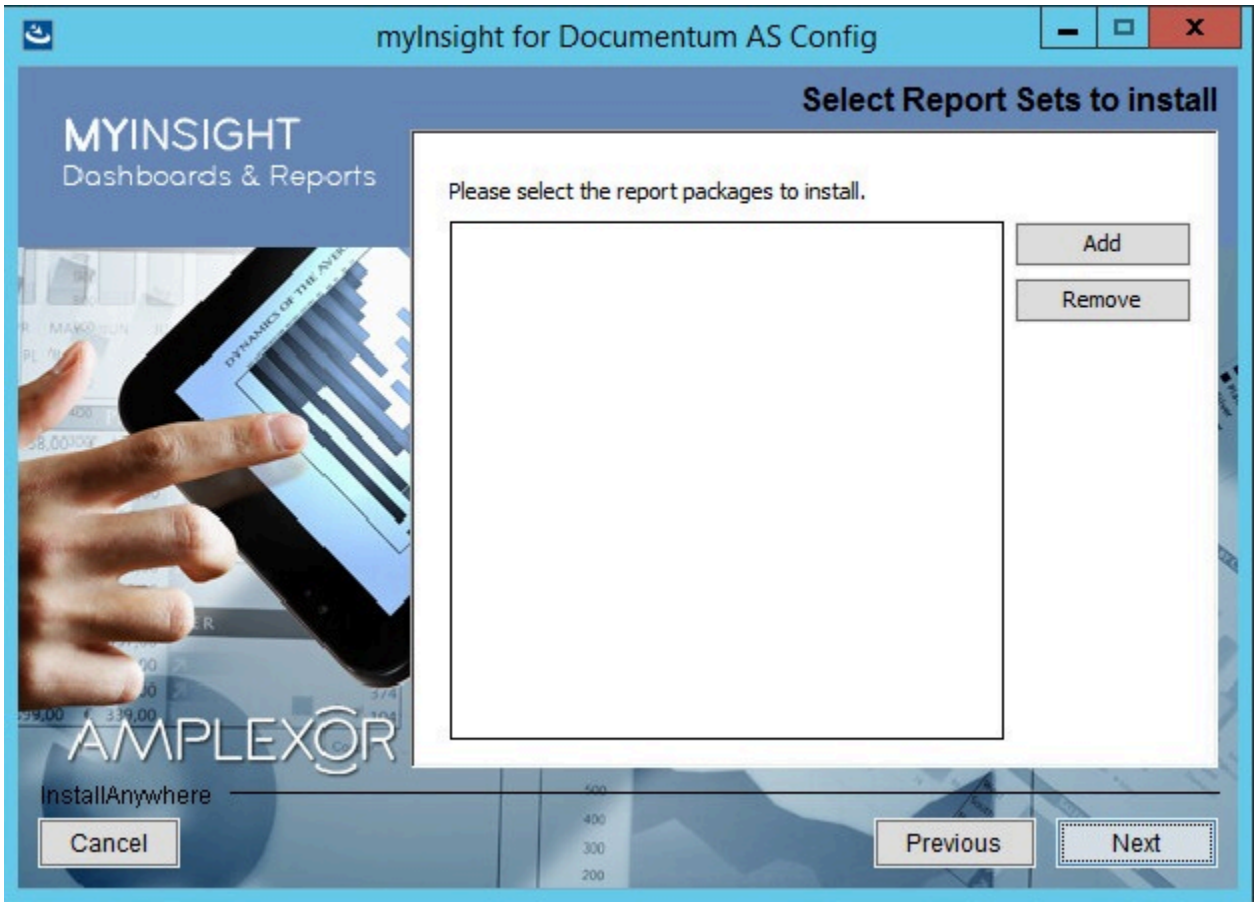

Figure 73: Selecting Report Packages to import

Note

Importing additional Report Packages is optional. If you do not wish to add any Report Packages, press **[Next]** to continue with the installation.

Other report packages can be included by clicking **[Add]**. This will allow you to browse in a file explorer to a local Report Package .zip file. Included Report Packages can be removed by selecting the package and pressing **Remove**.

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

Figure 74: Specifying the cabinet name

Type the name of the cabinet that will be used by myInsight. The default value is "myInsight".

Click **[Next]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

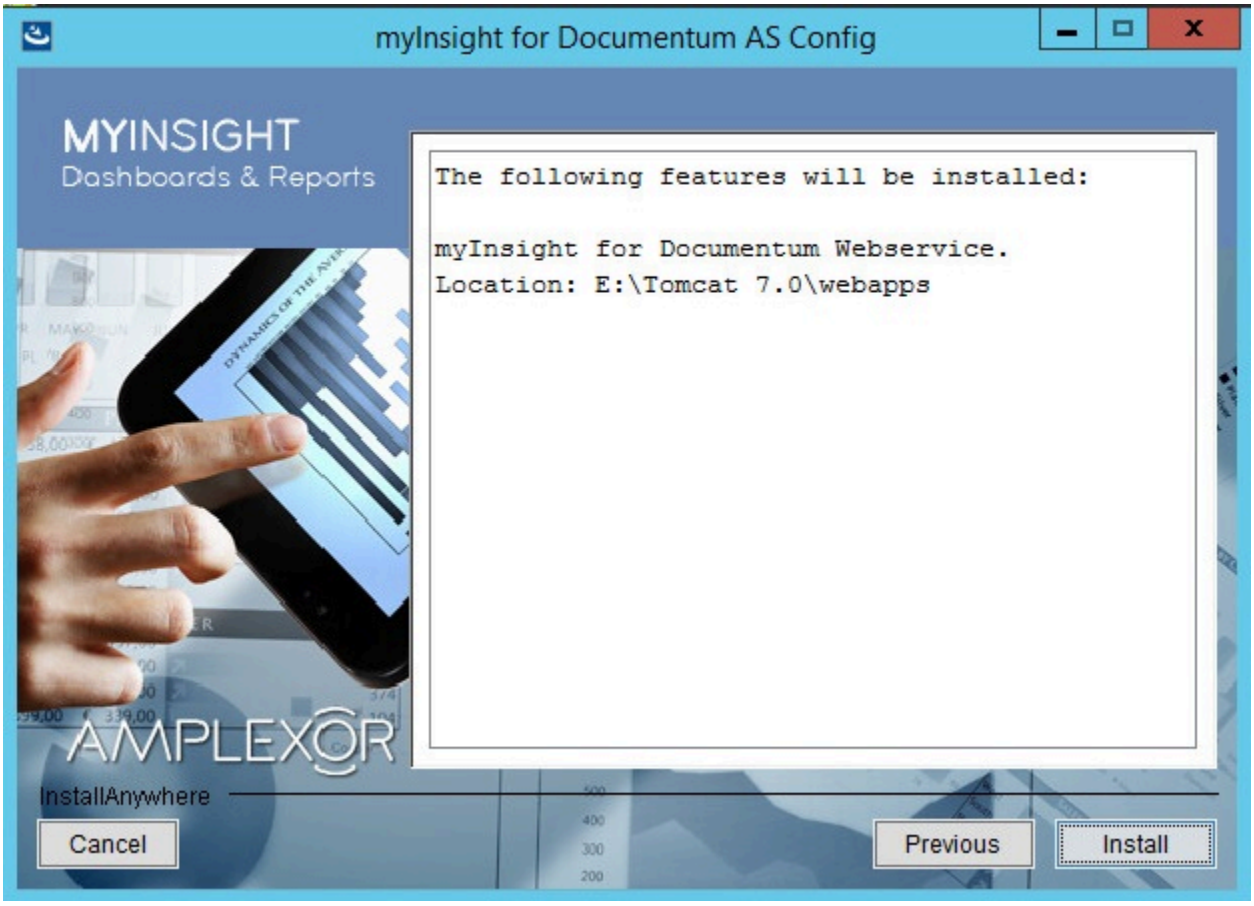

Figure 75: The installation summary

The installation summary screen is shown, listing all details of the upcoming installation.

Click **[Continue]** to continue with the installation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the installation.

3.4.7. Web Application Configuration - Upgrade/Update

Important If you're upgrading from eDRG pre 3.6, you need to use the uninstallers from that version to uninstall the application server **installation.**

The steps for the upgrade of myInsight in a Web Application are identical to the installation steps.

See chapter **Web Application Configuration - Installation** on page 37

If you are upgrading myInsight from a previous version and any of the files of myInsight have been changed since the last installation, you will get warnings in the log file.

The changed files will be overwritten by the upgrade. The installer will log the changed files in the log file of the installer.

The upgrade of myInsight in one or more web applications is now complete!

3.4.8. Aborting/Cancelling Installation/Update/Uninstallation

Whenever during the installation process the **[Cancel]** button is clicked, the following confirmation screen appears.

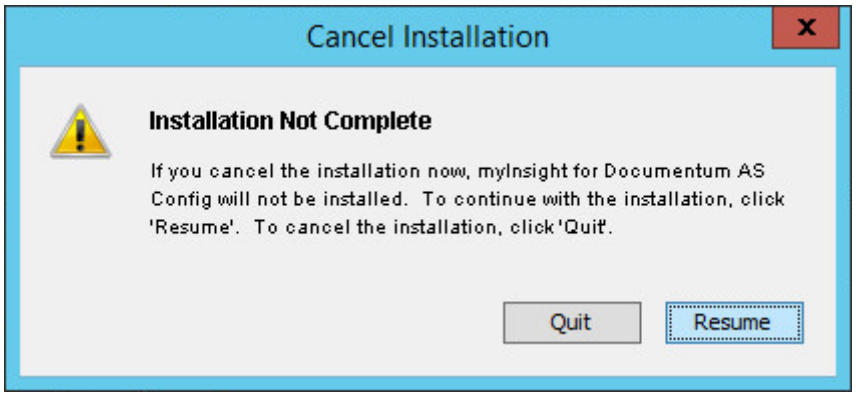

Figure 76: Cancel confirmation screen

By clicking **[Yes]**, you confirm the aborting/cancellation of the installer. The installer will be closed.

By clicking **[No]**, you dismiss the abortion trigger and return to the previous screen.

3.4.9. Silent/Unattended Installation

The installation software can also be executed in a silent/unattended mode.

Create a file name installer.properties and place it in the same directory as the installation software.

Fill in the following properties in the created file:

INSTALL	Set this property to 1
CHOSEN_FEATURE_LIST	Use the following value: FeatureD24x
CHOSEN_INSTALL_FEATURE_LIST	Same as CHOSEN_FEATURE_LIST
D2_TARGET_DIR	The full path to the folder where myInsight.war file should be placed
INSTALL_GRAPHICAL_RESOURCES	Always set this to false

CABINET_NAME	The name of the cabinet myInsight is installed in
D2_WAR_FILE	The full path to the D2.war application
D2FS_WAR_FILE	For 4.0: The full path to the D2FS.war application For 4.1 and newer: The full path to the D2.war application (same as D2_WAR_FILE)
SELECTED_REPORTSETS	The full path to the report set you want to import (optional)

```
INSTALL=1
CHOSEN_FEATURE_LIST=FeatureD24x
CHOSEN_INSTALL_FEATURE_LIST=FeatureD24x
D2_TARGET_DIR=D:\\Tomcat\\webapps
INSTALL_GRAPHICAL_RESOURCES=false
D2_WAR_FILE=D:\\Tomcat\\webapps\\D2
D2FS_WAR_FILE= D:\\Tomcat\\webapps\\D2
CABINET_NAME=myInsight
SELECTED_REPORTSETS=C:\\Users\\dmadmin\\Desktop\\demo.zip
```

INSTALL REMOVE ROLLBACK	Set this property to 1
CHOSEN_FEATURE_LIST	Use the following value: FeatureWDK The features to install separated by a comma. The following features are available: FeatureLang_de_DE – The German language pack FeatureLang_es_ES – The Spanish language pack FeatureLang_fr_FR – The French language pack FeatureLang_nl_NL – The Dutch language pack FeatureLang_ar_AR - The Arabian language pack
CHOSEN_INSTALL_FEATURE_LIST	Same as CHOSEN_FEATURE_LIST
WDK_TARGET_DIR	The full path to the Webtop, DA application
INSTALL_GRAPHICAL_RESOURCES	true – To install the resources for the graphical reports application false – To not install the resources for the graphical reports application

GRAPHICAL_RESOURCES_DIRECTORY	The full path to the directory where the resources for the graphical reports application should be installed (only used if INSTALL_GRAPHICAL_RESOURCES is true)
CABINET_NAME	The name of the cabinet myInsight is installed in
SELECTED_REPORTSETS	The full path to the report set you want to import (optional)

```
INSTALL=1
CHOSEN_FEATURE_LIST=FeatureWDK,FeatureLang_fr_FR,FeatureLang_de_DE
CHOSEN_INSTALL_FEATURE_LIST=FeatureWDK,FeatureLang_fr_FR,FeatureLang_de_DE
WDK_TARGET_DIR=D:\\Tomcat\\webapps\\da
INSTALL_GRAPHICAL_RESOURCES=true
GRAPHICAL_RESOURCES_DIRECTORY= D:\\Tomcat\\webapps
CABINET_NAME=myInsight
```

Start the installation software from the command line with the -i silent switch:
WebAppConfiguration.exe -i silent

Or

./WebAppConfiguration.bin -i silent

These commands will complete immediately and the installation will run in the background.

Check the logfiles after the installation completes.

Note If want to you use a \ character in the installer.properties file you need to enter it twice: \\ .

3.5. Post Installation Tasks

3.5.1. Using myInsight Widgets in D2 4.x

You need to have a workspace where widgets can be loaded. You can create 2 type of myInsight widgets:

A widget where myInsight is loaded and from where you can run a report.

Use these settings;

- Type: ExternalWidget
- Bidirectional communication: checked

Example:http://172.25.180.125:8080/myInsight/?user=$LOGIN&repository=$DOCBASE&ticket=$TICKET

> **Note** When using D2 version 4.5 or higher, it's recommended to remove '&ticket=$TICKET' from the URL.

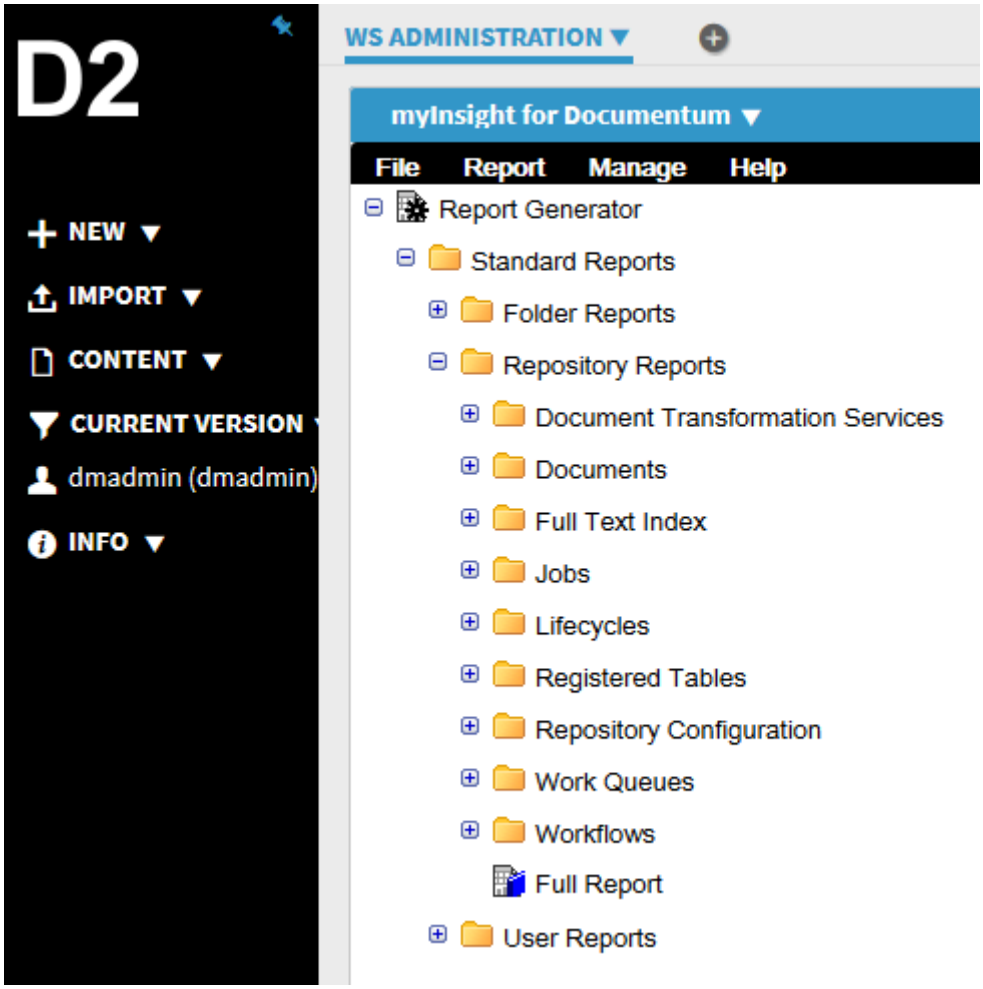

Figure 77: myInsight screen from which reports can be run

Use these settings;

- Type: ExternalWidget
- Bidirectional communication: checked
- Example For 4.1 and higher: http://172.25.180.125:8080/myInsight/?user=$LOGIN&repository=$DOCBASE&op enreport=<path to report>&ticket=$TICKET

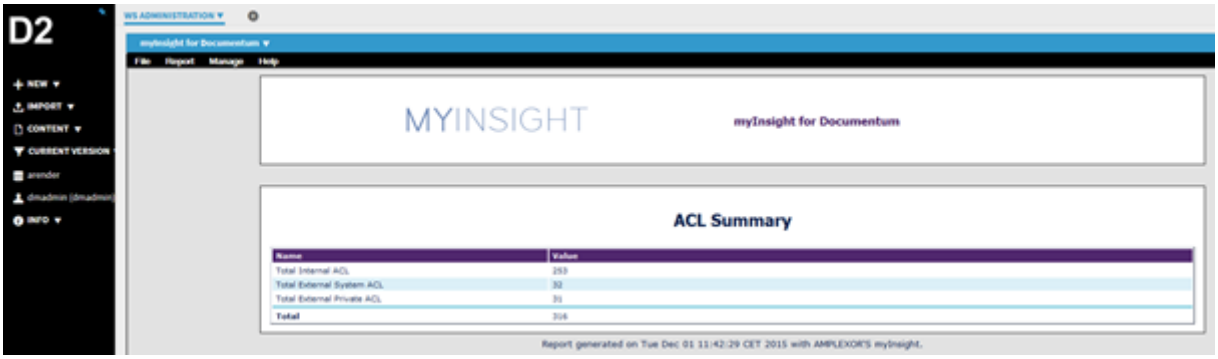

Figure 78: myInsights reports loaded directly into the widget

> **Note** When using D2 version 4.5 or higher, it's recommended to remove '&ticket=$TICKET' from the URL.

Replace the **<path to report>**with the full path to the report definition or the object id of the report definition.

To hide the myInsight menubar add the parameter "hidemenu=true" to the URL Example: http://172.25.180.125:8080/myInsight/?hidemenu=true&user=$LOGIN&repository=$DOCBASE&openreport=<path to report>&ticket=$TICKET

To give myInsight widget a name for use in the report to myInsight communication add the parameter "name" to the URL.

Example: http://172.25.180.125:8080/myInsight/?name=myInsightWidget&user=$LOGIN&repository=$ DOCBASE&openreport=<path to report>&ticket=$TICKET

3.5.2. Using myInsight Widgets in xCP

After myInsight for xCP is installed, you can find the myInsight widget under custom. To add it to a page, simply drag it into the designer.

Next is to configure the myInsight widget. The properties screen of the widget will look like the following:

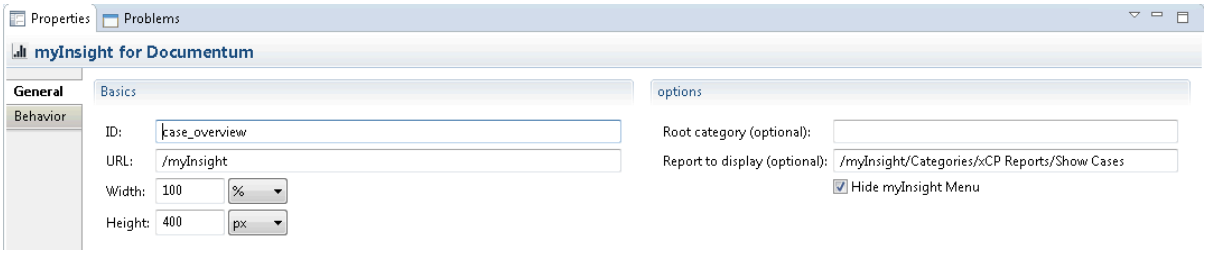

Figure 79: myInsight Widget properties screen

Under basics, besides the widget's width and heigth two fields can be figured:

- ID. This is an ID of the widget.
- URL. This is the relative path that myInsight is located. This will most likely be */myInsight*.

Under Options you can configure what part of myInsight will be displayed in the widget. The default configuration is to display the report tree (if the user has access to it). The three settings that can be configured are:

- Root category. In this field you can enter the path to a specific Report Category. This would look like: */myInsight/Categories/…*. This will reduce the amount of relevant reports.
- Report to display. Automatically runs the selected report. This would also look like: */ myInsight/Categories/…*
- Hide myInsight menu. When enabled, myInsight's menu bar will not be displayed in the xCP widget.

3.5.2.1. Register a myInsight click event in xCP

Follow these general steps to configure a behavior for the myInsight widget:

1. Select the object that will 'receive' the event.
2. Add a subscription in the object's behaviour tab.
3. Add a new behavior trigger.
4. Select any of the my_event1-5 or myselectobject.
5. In inputs, refer to value of the same event.

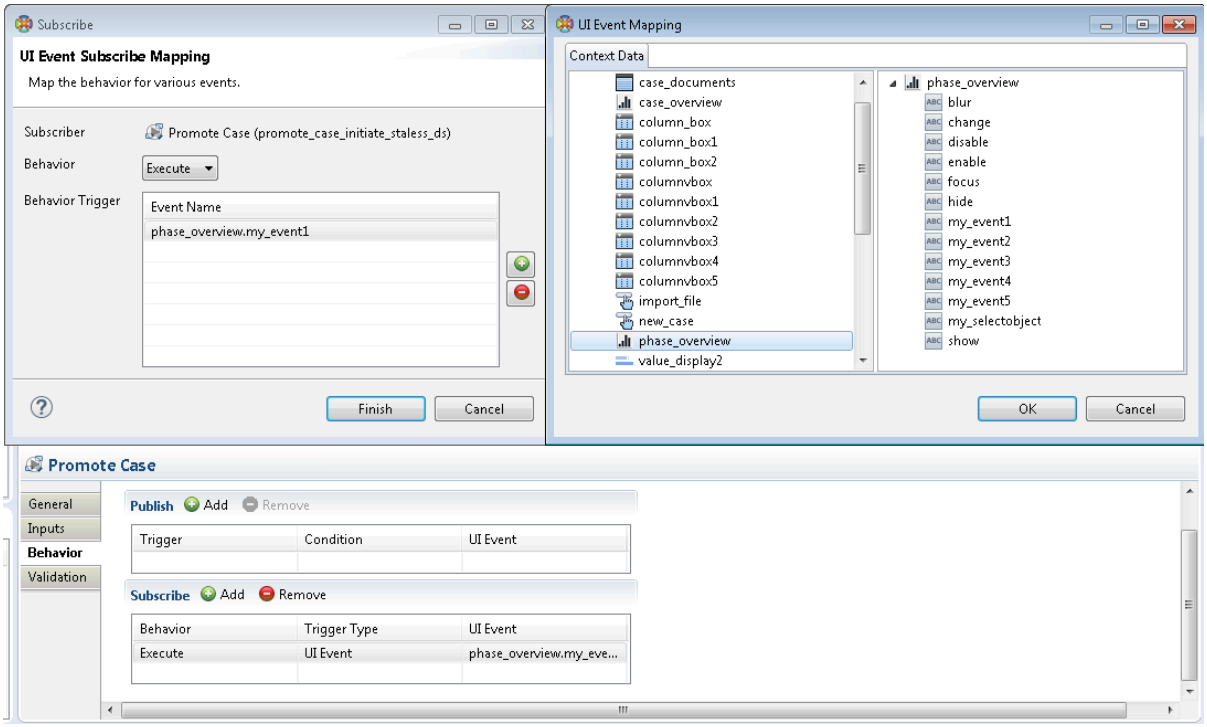

Figure 80: Registering a myInsight click event in xCP

Apart from starting a process, possible responses include refreshing result list widgets and going to an object page. To know which event can be used depends on the report and presentation. The following reports can be used to send events:

- Folder reports. For these always use the myselectectobject.

- FusionInterface reports. The used event(s) can be defined with the xcpActions variable. See the FusionInterface user guide for more info.
- For other implementations, a custom XSL stylesheet that calls the xCP Action is required.

3.5.2.2. Responding to the myInsight widget click event

Follow the following steps to use the object that was clicked on for your intended behaviour. In this example, the object ID is used to promote a case.

1. Select the myInsight widget.
2. In Behavior, choose *Selected Object*.
3. In the field below, select the object ID returned by the event.
4. In Behavior Trigger, add the trigger supplied by the event.

Apart from responding to a process, possible responses include responding to a click on a result list widget or an xCP event in another myInsight widget.

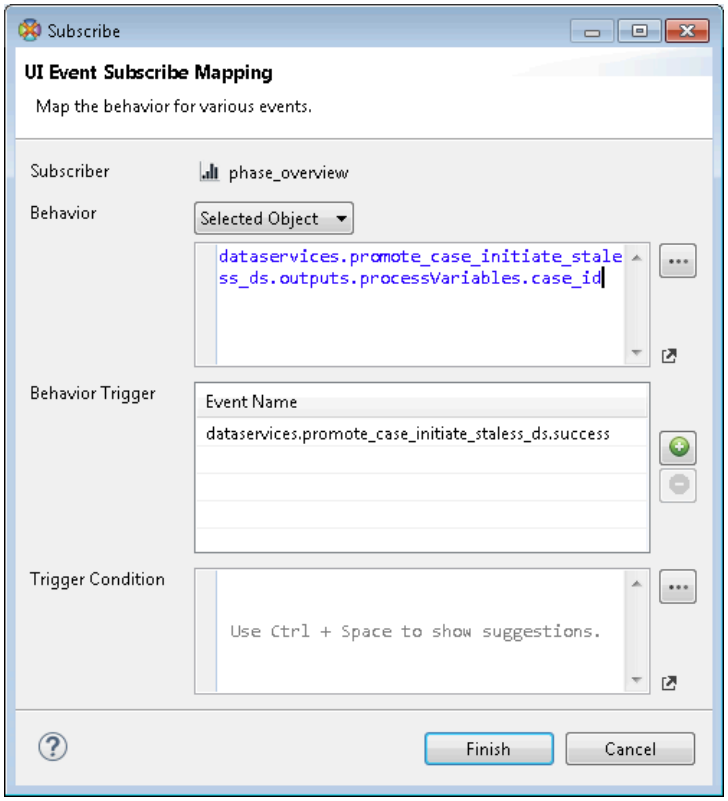

Figure 81: Using the returned Object ID

3.5.3. Additional Installation Steps for D2 4.1 and D2 4.2 Only

This step is optional if you only use myInsight widgets with bi-directional communication enabled.

Edit this file on the application server webapps\myInsight\WEB- INF\classes \applicationContext.xml and change these settings:

- Link the defaultUri property to the correct D2 URL: http://<HOST_NAME>:<PORT>/D2/ws (E.g. <property name="defaultUri" value="http://localhost:8080/D2/ws"/>).

Stop the Application server.

Remove the application server cache/work folder.

Start the application server.

3.5.4. Object Types

Sometimes Documentum will not immediately pick up the changed object types after installation. In this case you can verify that the DataDictionaryPublisher job has run and remove the cache folder from the application server. After this, the server can be restarted. The cache folder is located on the application server (the location of this folder depends on the system configuration). The cache folder can be removed completely; it will be recreated automatically.

3.5.5. Logging Errors in XSL-FO and SVG

XSL-FO and SVG can be used to create PDF reports but because of the logging method used by Apache FOP (XSL-FO) and Batik (SVG) to log errors, we cannot place those messages in the myInsight log file.

Add the following to the file DFC_USER_DIR\config\log4j.properties on the content server, to write the error messages to a separate log file:

```
log4j.logger.org.apache.batik=WARN, FOP_LOG
log4j.logger.org.apache.fop=WARN, FOP_LOG
log4j.appender.FOP_LOG=org.apache.log4j.RollingFileAppender
log4j.appender.FOP_LOG.File=D\:/Documentum/UserDir/logs/fop.log
log4j.appender.FOP_LOG.MaxFileSize=10MB
log4j.appender.FOP_LOG.layout=org.apache.log4j.PatternLayoutlog4j
    .appender.FOP_LOG.layout.ConversionPattern=[%d{ISO8601}
    |%-5p|%-22t|%C]%m%n
```

With these settings, all errors and warnings from Apache FOP and Batik are written to the file fop.log.

3.5.6. Roles

To enable users to use myInsight, they must be added to one of the three myInsight roles.

Note

The user that runs the Java Method Server (usually the installation owner) needs to be a member of the report_administrator role. The user used during the installation of myInsight is automatically added to this role.

3.5.7. Demo Reports

The demo reports (any reports in the category 'Standard reports') are overwritten when you install a new version of myInsight. To use the demo reports:

1. Copy the reports you want to make available to a new category.
2. Hide the other reports.

3.5.8. Silent import of Report Package

You can use the libraries from the myInsight webapplication (for example the myInsight D2 Widget) to import a myInsight Report Package from the command line.

The command line is a java call, use the following syntax:

```
java -cp <all the jars from the application + the classes
 directory>  com.acolad.myinsight.cmdline.ImportReportPackage
 --repository <repository> --username <username> --password
 <password> --domain <domain(optional)> --reportpackage <full path
 to the report package to import>
```

3.5.9. Using the Saxon XSLT Processor

The Report Generator will automatically use the Saxon-HE, Saxon-PE (Saxon B) or Saxon-EE (Saxon-SA) XSLT processor if it's available on its classpath. To place the Saxon XLST processor on the classpath you can copy the Saxon jar file (available from their website) to the folder

```
…/jboss?.?.0/server/DctmServer_MethodServer/deploy/ServerApps.ear/
APP-INF/lib
```

on the content server and restart the Documentum Java Method Server.

Note

The demo reports included with myInsight do not work when the Saxon XSLT processor is installed.

3.5.10. Setting a default dashboard for the myInsight Mobile Application

You can configure a default dashboard to show to myInsight Mobile users who connect to the repository. If the user has not yet configured his personal dashboard in the mobile application, this default dashboard will be presented.

To set a default dashboard, edit the "standard_dashboard_mobile.xml". This file is located in the root of the myInsight cabinet.

Note

standard_dashboard_mobile.xml is a hidden file. It can be viewed via DQL Tester, or in DA with 'view hidden' enabled.

The following syntax should be used in your XML file:

```
<ReportDefinition id='{{object id of the report definition}}'
 title='{{label for the dashboard in the mobile client}}'
 index='{{index of the presentation to use}}'>
  <variable id='{{Name of the variable to set}}'>
    <value>{{Value for the variable}}</value>
    <value>{{Second value for the variable (only for repeating
 variables)}}</value>
    ...
  </variable>
  ...
</ReportDefinition>
...
```

For example:

```
<?xml version="1.0" encoding="UTF-8"?>
<DefaultTiles>
    <ReportDefinition id='090004d280000e79' title='User task per
 status' index='0'>
        <variable id='$exclude_users$'>
            <value>demo</value>
            <value>dm_bof_registry</value>
        </variable>
    </ReportDefinition>
    <ReportDefinition id='0901e240800d5a13' title='Reports Created
 Today' index='0'>
    </ReportDefinition>
</DefaultTiles>
```

3.5.11. Configuring Tomcat for myInsight in D2

If you are installing myInsight for D2 on a webserver with Tomcat 8.0.x, you will need to edit the 'catalina.properties' file to prevent a 'Error retrieving the repositories' error message.

1. Locate the file **catalina.properties** at '<CATALINA_HOME>/conf/'
2. Open the file **catalina.properties** in a text editor
3. Add the following line of text at the end of the file:
   `jnlp.com.rsa.cryptoj.fips140loader=true`
4. Save and close the file.
5. Restart the Tomcat webserver for the effects to take place.

3.5.12. Configuring Tomcat for myInsight on mobile

To use myInsight on mobile devices, add the following parameter to your Tomcat CorsFilter:

1. Locate the config file. You can find it at '$CATALINA_BASE/conf/web.xml' for **all** web apps, or you can use '$CATALINA_BASE/webapps/*myInsightService*/WEB-INF/web.xml' for only the myInsight web app. Note that the service name (*myInsightService*) may be different in your situation.
2. Open the file and set cors.allow.nullorigin to true for your CorsFilter.

```
<filter>
   <filter-name>CorsFilter</filter-name>
   <filter-class>org.apache.catalina.filters.CorsFilter</filter-
class>
   <init-param>
      <param-name>cors.allow.nullorigin</param-name>
      <param-value>true</param-value>
   </init-param>
   </filter>
<filter-mapping>
   <filter-name>CorsFilter</filter-name>
   <url-pattern>/*</url-pattern>
</filter-mapping>
```

3.5.13. Configuring JBoss for myInsight

D2 4.7 and xCP 2.3 support JBoss 6.4.x. When installing myInsight for JBoss 6.4.x the following steps must be followed to ensure myInsight functions correctly.

1. If available, delete the dfc.keystore file in <JBoss Home>\bin
2. Move the dfc.keystore file from <WebApp Root>\WEB-INF\classes to the bin folder of the <JBoss Home> directory.
3. Edit the standalone.xml file under <jboss-home>/standalone/configuration and replace 127.0.0.1 with the JBoss host IP address in the <wsdl-host> section and in the <interfaces> section as follows:

```
<wsdl-host>${jboss.bind.address:<jboss-host-ip>}</wsdl-host>
<interfaces>
    <interface
        name="management"><inet-address
        value="${jboss.bind.address.management:<jboss-host-
ip>}"/></interface><interface
        name="public"><inet-address
        value="${jboss.bind.address:0.0.0.0}"/></
interface><interface
        name="unsecure"><inet-address
        value="${jboss.bind.address.unsecure:<jboss-host-ip>}"/
>
    </interface>
</interfaces>
```

4. Extract the myInsight.war file to a myInsight folder and rename the folder to myInsight.war;

5. Place the myInsight.war folder into the JBoss Deployment location;
6. Create a file in the Deployments folder called myInsight.war.dodeploy;
7. Start the JBoss application server again, the myInsight.war.dodeploy will change to myInsight.war.deployed when the application is deployed correctly;
8. Navigate to http://<applicationserver:portnumber>/myInsight and check if you're able to login into the application without any issues and if you can generate some reports.

3.5.14. Configuring myInsight Server

After installing the myInsight Server, the configuration can be changed at a later stage. The configuration file can be found at 'myInsightServer/WEB-INF/classes/myInsightServer.xml'. The contents would look like the following:

```
<?xml version="1.0" encoding="UTF-8"?>
<config>
    <superuser_session repository="myInsightDev01">
        <username>user1</username>
        <password>abcde12345=</password>
        <domain/>
    </superuser_session>
    <superuser_session repository="myInsightDev02">
        <username>user2</username>
        <password>12354abcde</password>
        <domain>some_domain</domain>
    </superuser_session>
    <logfolder>logs</logfolder>
    <max_log_days>14</max_log_days>
    <storage_folder>storage</storage_folder>
</config>
```

superuser_session: the myInsight server can connect to multiple repositories. Each repository that is added requires its own superuser connection.

logfolder: the folder that is used for session-specific logs. This can be a hard path or a path relative to the server that myInsight server is running on.

Logging is done in folders seperated by date under the designated logfolder. Each session will create a different file. Any logging that can not be attributed to a session is added to the logs of the server on which myInsight server is installed.

If an automatically scheduled report fails, the log is send to the superuser home cabinet in the repository.

max_log_days: how long session-specific log is kept.

storage_folder: this folder is used for temporary storage when the 'Do not store report' option is used.

Note

The storage_folder variable should be the same for all myInsight installations that have shared access via a load balancer.

4. Uninstallation myInsight for Documentum

4.1. Repository

To remove myInsight from a repository:

Use the Repository Configuration program.

Choose the Remove an existing installation from a repository configuration type.

Note	You need to use the installation owner of the repository during uninstall. This user must be a member of the report_administrator role (this user is added to this role during installation).
Caution	This action will remove all objects related to myInsight, including generated Reports and ALL objects in the specified cabinet.

Figure 82: Selecting the uninstallation option

Figure 83: Uninstallation summary

At the final step you'll have to click **[Continue]** to proceed with the uninstallation of myInsight.

Click **[Continue]** to continue with the uninstallation.

or

Click **[Previous]** to go to the previous screen.

or

Click **[Cancel]** to abort the uninstallation.

4.2. Web application

To remove the web application files from a web application:

- For D2 4.x: Remove the installed myInsight.war file from your application server.
- For all other clients: Use the Web application Configuration program

4.2.1. Completely Uninstall

To remove the web application files from a web application, use the Web application Configuration program:

Figure 84: Selecting the uninstallation option

Select the option "Remove an existing installation from a webapplication".

Figure 85: Selecting the webapplication to uninstall

If the uninstallation was successful then you should manually remove the file myinsight/myInsight_install_log.dat

> **Note** Some files will not be removed completely because they might contain other customizations or might be referenced from other files.

4.2.2. Rollback Last Installation

The Web application Configuration program contains a rollback function. This will revert all changes made to the web application to the state before the installation. This rollback works better than the normal uninstall (described in **Completely Uninstall** on page 103) but there are some limitations:

If myInsight is installed and later upgraded to a newer version, the rollback must be run twice (or more if more upgrades are installed).

The rollback might fail if modification(s) were made to the web application after myInsight was installed or if the backup files generated by the installer, are removed.

Important Rollbacks to versions prior to 5.0 are not supported.

To roll back the installation of myInsight, use the Web application Configuration program:

Figure 86: Selecting the rollback option

Select the option "Rollback the last installation"

5. Upgrading Underlying Platform or Components

5.1. Upgrading Documentum Platform

Upgrading your Content Server and Webtop:

1. First, complete the normal upgrade as described in the manuals provided by Documentum.
2. Run the **Web Applicaton Configuration** on the application server to include myInsight interface.

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