Content Manager

Software Version 25.2

Intelligence Integration

opentext™

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Legal notices

Documentation updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

Support

Visit the MySupport portal to access contact information and details about the products, services, and support that OpenText offers.

This portal also provides customer self-solve capabilities. It gives you a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the MySupport portal to:

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- Enter into discussions with other software customers
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Many areas of the portal require you to sign in. If you need an account, you can create one when prompted to sign in.

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Introduction

The Content Manager Intelligence integration enables you to integrate Content Manager with OpenText Intelligence to design and generate reports.

The integration enables you to seamlessly design the layout of the reports and set up the Content Manager data set to use for the reports.

IMPORTANT: Integration considerations

- The saved search column order in Content Manager will not be honored in the reports of OpenText Intelligence if the chart type is table. The reports will display the columns in the order available in the Service API.
- ICONs in Content Manager, say currency etc., will not be available in the OpenText Intelligence reports.
- If the data for the report is huge and it takes long time to run the report, it is recommended to create Data Objects and schedule the Data Objects to create data files and then create reports from it.
- Make sure to restart the **OpenText Magellan BI and Reporting** service once you have installed the Content Manager Intelligence Plugin.

Intelligence integration prerequisites

1. Install the Analytic Designer, and/or InformationHub, and Intelligence System Console.

   The following exe files are bundled in **opentextintelligence-bundleforwindows-24.4.zip** and **opentextintelligence-systemconsole-24.4.zip** files:

   - **opentextintelligence-designer-24.4.exe** - install the OpenText Analytic Designer to design the reports and set the data source. The Content Manager Intelligence Plugin is integrated with this component to design and generate the reports.
   - **opentextintelligence-24.4.exe** - known as InformationHub (ihub/iportal), allows you to manage published reports.
   - **opentextintelligence-systemconsole-24.4.exe** - the Intelligence System Console helps you to manage and import the users from **LDAP/Active Directory Adapter**.
2. Run the Content Manager Intelligence Plugin (**CM_Intelligence_Plugin_x64.msi**) located at **\Content_Manager_buildnumber\64BitInstalls** to integrate with the OpenText Intelligence.
3. Restart the **OpenText Magellan BI and Reporting** service.

Installation and configuration

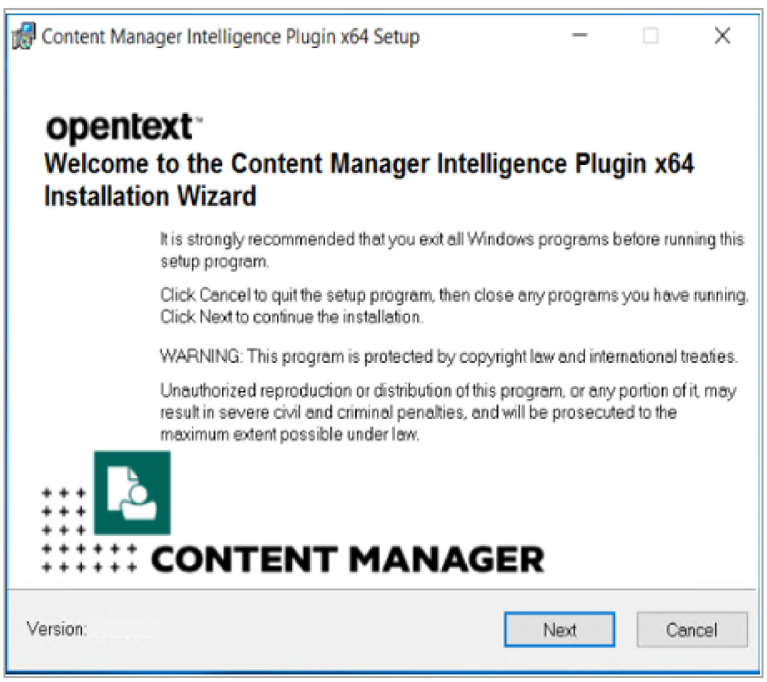
Installing the Content Manager Intelligence integration

> **NOTE:** Before you run the **CM_Intelligence_Plugin_x64.msi**, make sure that either one or both are installed:
>
> - OpenText Analytical Designer.
> - OpenText InformationHub.

1. On your installation medium, locate the installation file and run it as administrator:

   CM_Intelligence_Plugin_x64.msi

   The Welcome to the Content Manager Intelligence Plugin x64 Installation Wizard dialog appears:

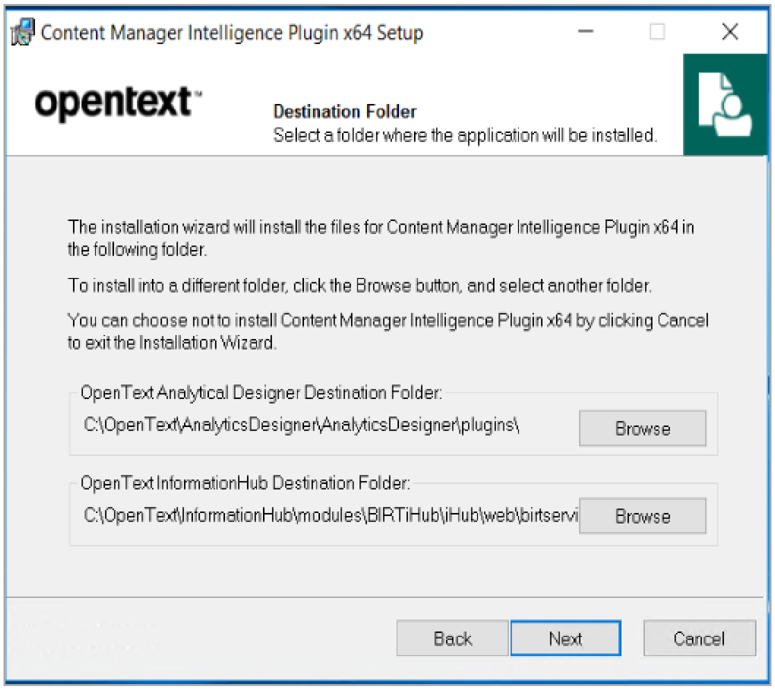
   

2. Click **Next**.

   The License Agreement dialog appears.

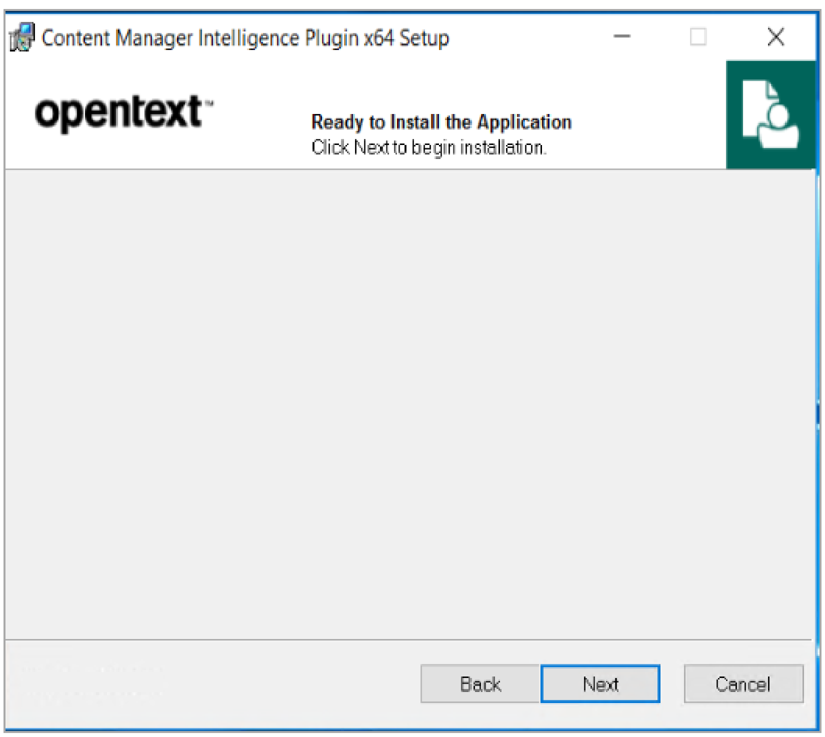
3. Select **I accept the license agreement** and click **Next**.

   The Destination Folder dialog appears:



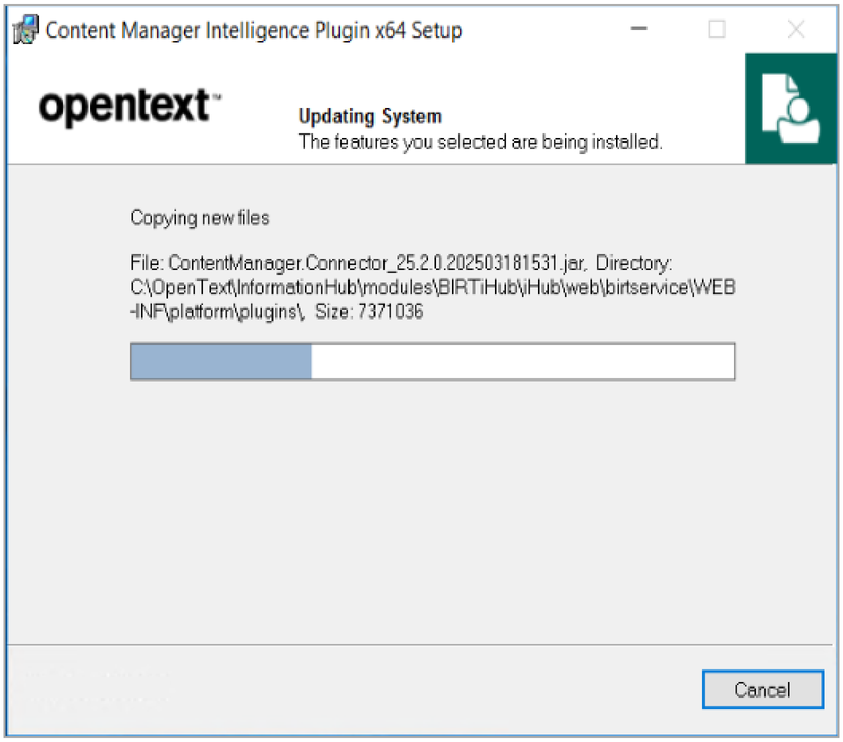
4. Click **Next**.

   The Ready to Install the Application dialog appears:

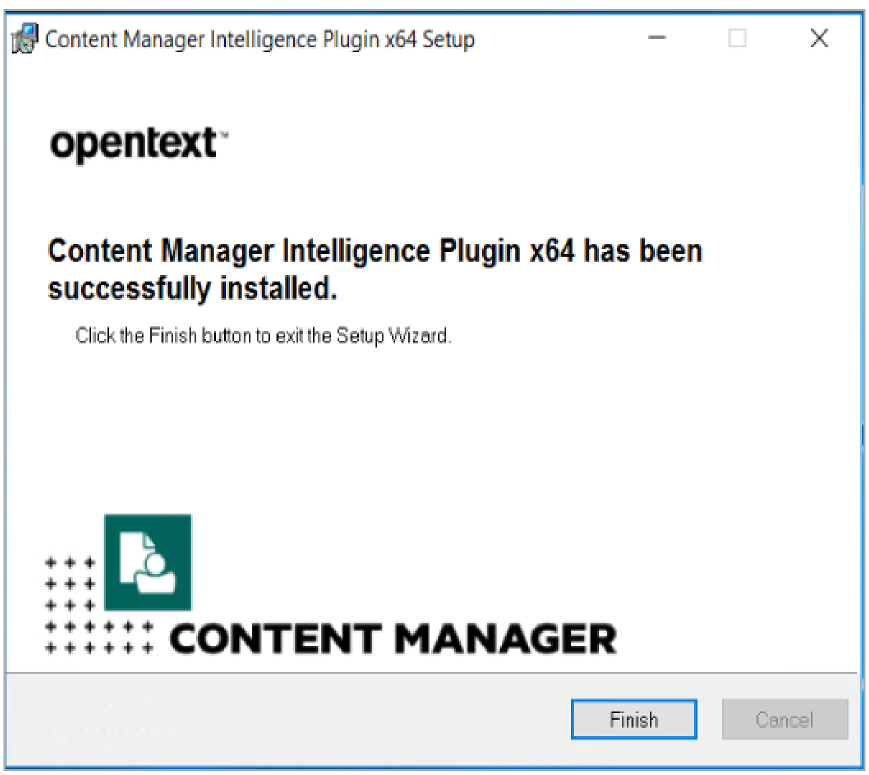


5. Click **Next**.

   The Updating System dialog appears:



A message indicating setup status is displayed.



6. Click **Finish** to exit the wizard.

Once the installation is complete, verify that:

1. The Content Manager jar files, **ContentManager.Connector_25.2.0.*buildnumber*.jar** and **ContentManager.Connector.ui_25.2.0.*buildnumber*.jar**, are available at OpenText Analytical Designer and/or InformationHub installation folder. For example, **C:\OpenText\AnalyticsDesigner\AnalyticsDesigner\plugins** and/or **C:\OpenText\InformationHub\modules\BIRTiHub\iHub\web\birtservice\WEB-INF\platform\plugins**
2. Entries of the Content Manager jar files are made in the **bundles.info** file available at the following location: ***install folder*** **\OpenText\AnalyticsDesigner\AnalyticsDesigner\configuration\org.eclipse.equinox.simpleconfigurator**
3. The Content Manager license (**acserverlicense.xml**) is available at location ***install folder*\OpenText\InformationHub\modules\BIRTiHub\iHub\shared\config**

Configuration

Importing users and groups to OpenText Intelligence

1. Run the **opentextintelligence-systemconsole-24.4.exe** and install the Intelligence System Console.

   Once installed an icon is available on your desktop.

2. Double-click the icon to open the user interface in a browser.
3. Log in to Intelligence System Console, navigate to the cluster, and then to the **User Management** tab.
4. In the **User management setting** section, select the directory service from the drop-down for the **Select User Management**.
5. Enter the configuration details for the connection setting and mapping required to import the users.

   For detailed information on what to fill in for the configuration, see OpenText Intelligence System Console help.

6. Click **Save**.

   The users are imported to the Information Hub under the directory/folder you specified during the configuration.

Designing the reports in OpenText Analytical Designer

Creating the report

1. Open the Analytic Designer.
2. Create a workspace and then create a project for the reports.

   While creating a project, in the New Project dialog, make sure to select **BIRT Project** from the list.

3. Right-click on the project where you want to create reports and then click **New > Report**.
4. Select the folder (Location) for the reports.
5. Enter a name for the **File name**.
6. Click **Finish**.

   A blank canvas or layout is displayed.

Creating the Data Source

1. In the **Data Explorer** tab, right-click on the **Data Source**, and then select **New Data Source**.
2. In the New Data Source dialog, select **Create from a data source type in the following list**.
3. From the list, select **Content Manager Data Source**. Click **Next**.
4. Enter the Service API end point URL in the **Workgroup server API end point URL**. For example, https://00.000.000.00/CMServiceAPI.
5. Enter details for Authentication - **Trusted user authentication** or **OpenID connect** and click **Test Connection**.
6. Click **OK** in the status message dialog.
7. Enter the **Page Size**. It is the number of records to fetch per page when you query the API. The possible values are from 1 to 999.
8. Enter the number of threads to be used for processing in the **Number of processing threads**. Default is 1 and the maximum number of threads possible are 5.
9. Click **Finish**.

Creating the Data Sets

1. In the **Data Explorer** tab, right-click on the **Data Sets**, and then select **New Data Set**.
2. For the **Data Source Selection**, select **Content Manager Data Source > <*data source*>** from the list.
3. For the **Data Set Type**, select **Content Manager Data Set**.
4. Enter a name for the **Data Set Name** and click **Next**.
5. For the **Query**, enter query text to be executed. Enter the URI of the saved search in the query. For example, ExecuteSavedSearch/909 where 909 is the URI of saved search in Content Manager.
6. Click **Finish**.

   The Edit Data Set window is displayed.
7. In the Edit Data Set dialog, the **Output Columns** includes all the columns from the Saved Search of the Content Manager.

   The Preview Results populates the saved search records from Content Manager.
8. Click **OK**.

Designing the report

1. In the **Layout** tab, right-click on the canvas, and select **Insert**.
2. Insert the required elements, such as **Text**, **Label**, **Image**, **Grid**, **Table**, **Chart** etc. and design your report.

For elements like Table, Grid, Chart etc, you need to select the type and provide the data source. You can preview the report.

Once the design is complete, right-click the report and select **Report > Run Report**.

Publishing the report

For the users to access the report you created, you need to publish the report to InformationHub.

1. Navigate to the report you want to publish, right-click and select **Publish**.

   Since the reports are published on the InformationHub, you need to add the InformationHub details.
2. In the **Publish Files** tab, for the **Server Profile**, click **Add**.
3. In the Server Profile dialog, enter the details - **Profile name**, **Server URL**, **User Name** and **Password** - and click **Finish**.
4. In the **Publish Files** tab, select **Publish Files**.
5. For the Destination, select the folder where you want to store the published reports.
6. Click **Publish**.
7. Open the InformationHub and navigate to the folder where you have published the report.
8. Click the report name to run it and the report is opened in a new tab.

Applying the access control

You can apply access control on the folder level for the users to access and view the report.

1. In the InformationHub, click More option of the folder where you want to apply access control.
2. Click **Share**.
3. Add the user and/or the user group(s) from the **Available** list to **Selected** list.
4. Select the privileges.

   Visible, **Execute**, **Grant**, **Secure Read**, **Write**, **Read**, **Delete**, and **All** are the different types of privileges.

   For details on privileges, see *Working with file privileges* section in *OpenText Intelligence Information Console Application User Guide*.
5. Select the following options:
   - **Apply these privilege settings to the content of the folder**
   - **Recursively include subfolders and their content**
   - **Replace existing privilege settings**
6. Click **OK**.

Data Objects

If you have huge amount of data, use data objects to schedule the report generation.

Creating the data object

1. In the **Analytical Designer > Project Navigato**r, right-click on the project where you want to create data object, and select **New > Data Object**.

   The New Data Object window is displayed.

2. Enter a name for the **File Name**.
3. Click **Finish**.

   The Components tab is displayed with Data Sources, Data Sets, Data Models, Shared Dimensions etc.

4. Right-click on the Data Sources component space and select **New Data Source**.
5. Select **Content Manager Data Source** from the list.
6. Enter the details for end point URL, authentication, page size, and processing threads.
7. Click **Test Connection** to test the connection.
8. Click **Finish**.
9. Right-click on the Data Sets component space and select **New Data Set**.
10. Provide details for **Data Source**, **Data Set Type**, and **Data Set**.
11. Click **Next**.
12. Enter the query text for the **Query**.
13. Click **Finish**.

    The Edit Data Set window is displayed.

    The columns you entered in the query are displayed in the **Output Columns**.

14. Click **OK**.
15. Click **Save** to save the Data Object settings.

Publishing the data object

1. To publish the Data Object, right-click the Data Object, and then select **Publish**.

   You need to add the InformationHub details.

2. In the **Publish Files** tab, for the **Server Profile**, click **Add**.
3. In the Server Profile dialog, enter the details - **Profile name**, **Server URL**, **User Name** and **Password** - and click **Finish**.

4. In the **Publish Files** tab, select **Publish Resources**.
5. Select the Data Object to be published and click **Publish**.

   The Data Objects you publish are available under the **Resources > Data Objects** folder in the InformationHub.

   You can now create a schedule for the data object to run.

Scheduling job for the data object

1. To create a schedule, click More option of the data object and select **Schedule**.
2. Provide necessary details in the Schedule tab for the **Priority**, **Executable version**, and **Scheduling Options**.
3. Click **Next**.
4. In the **Save As** tab, provide required details and click **Finish**.

   A status message with Job ID is displayed.

Viewing the status of the job

1. In the InformationHub, click **My Jobs**.
2. Click **Scheduled**, **Waiting for Event**, **Pending**, **Running**, or **Completed** tab to view the job status.

Once the scheduled job is executed successfully, you can create report from the data object.

Creating report from the data object

1. In the InformationHub, in the right panel, select **Create > New Report**.

   The OpenText Analytical Studio is opened with **Data** and **Visualization** tabs.

   The Select Data dialog is displayed
2. Add the data objects from the **Available Data** list to the **Selected Data** list.
3. Select the required version of the data object and click **OK**.
4. In the Visualization tab, add the report elements like table, grid, chart etc and design the report.
5. Click **OK**.
6. Click the save icon to save the report.
7. Select the folder for the report to be saved.
8. Enter a name for the **File Name**.
9. Click **OK**.
10. Go to InformationHub and navigate to the folder where the report is saved.
11. Click the report to display the report.