Administrator Solution Tools Guide

PV620 SV101

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Overview

Administrator Solution Tools provides a single dashboard to access multiple solutions, each enabling OneStream administrators to perform their role effectively and efficiently. An overview of each solution within Administrator Solution Tools is described below.

Business Rule Viewer

Allows Administrators to view current and historical business rules and member formulas. It also provides a historical audit trail of all rules that have been added, edited or deleted.

Member Formula Builder

The Member Formula Builder lets you create and maintain dynamic and stored calculations with step-by-step directions in a user-friendly interface that allows the user to avoid writing code. It also provides the ability to see all formulas for a member in one place, including the scenario and time-varying formulas.

Home Page Manager

Administrators can easily assign a default Home Page to a user or user group to display when logging into OneStream.

Log Cleaner

Provides administrators with a simple interface to manage log files by allowing them to delete any log type (Error, Logon or TaskLogs) in increments of 30 days up to 810 days.

Setup & Installation

This section contains important details related to the planning, configuring, and installation of your solution. Before you install Administrator Solution Tools, familiarize yourself with these details.

See also: MarketPlace Solution Modification Considerations

Dependencies

Component	Description
OneStream 6.2.0 or later	Minimum OneStream Platform version required to install this version of Administrator Solution Tools.

Select the Administrator Solution Tools Development Location

Before beginning installation, decide whether to build Administrator Solution Tools directly in the Production OneStream application or in a separate Development OneStream application. This section provides some key considerations for each option.

Production OneStream Application: The primary advantage of building Administrator Solution Tools in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity and not advised.

> **Note:** OneStream strongly recommends that you implement Administrator Solution Tools in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream Application: As a best practice, use the Development OneStream application to build Administrator Solution Tools.

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to Administrator Solution Tools such as workflow profiles and entities are in the production application.
2. Copy your production OneStream application to your Development environment and rename it. This development version is used for your Administrator Solution Tools project.

Application Server Settings

You may need to edit the OneStream Application Server Configuration so users can create and change data in the additional database tables used by Administrator Solution Tools. If other MarketPlace solutions (such as Planning) are already in the application, these adjustments may already exist.

See also: Solution Database Migration Advice

Configure the OneStream Application Server

Be sure that the security group settings include the users who will be working on and setting up Administrator Solution Tools before proceeding.

> **Note:** Group settings are applicable to all MarketPlace solutions; it is important to keep the group names generic.

1. Start the OneStream Server Configuration Utility as an Administrator.
2. Click **Open Application Server Configuration File > Database**.
3. Edit the following **OneStream Database Server properties**:

- **Access Group for Ancillary Tables**: Select a group that includes those who will access records.
- **Can Create Ancillary Tables**: True
- **Can Edit Ancillary Table Data**: True

- **Maintenance Group for Ancillary Tables**: Select a group who will edit and maintain tables.
- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.

4. Restart Internet Information Server.

Install Administrator Solution Tools

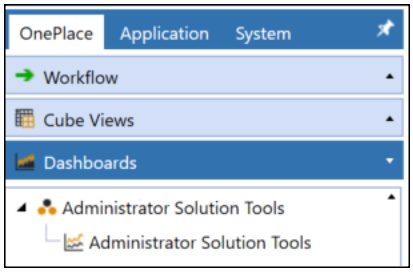
1. On the OneStream MarketPlace Dashboard, click **MarketPlace > Administrator Solution Tools**.

2. On the Administrator Solution Tools Solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and then click **Download**.
4. Log in to OneStream.
5. On the **Application** tab, click **Tools > Load/Extract**.
6. On the **Load** tab, locate the solution package using the **Select File** icons and click **Open**.
7. When the solution's file name appears, click **Load**.
8. Click **Close** to complete the installation.

Set Up Administrator Solution Tools

The first time you run Administrator Solution Tools, a guided table setup process begins.

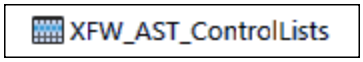
In OneStream, click **OnePlace > Dashboards > Administrator Solution Tools > Administrator Solution Tools**.



Create Tables

1. Click **Step 1: Create Tables**.

   This step may be necessary when upgrading even if tables are already present. Administrator Solution Tools will not drop any tables that already exist but will modify table structures and add any new ones if necessary.

2. When setup is complete, click **Step 2: Launch Solution** to open Administrator Solution Tools.

Package Contents

The Dashboard Maintenance Unit provides the user interface for Administrator Solution Tools and includes the required dashboard groups, components, data adapters, parameters and files.

XFW Administrator Solution Tools
This is the Dashboard Maintenance Unit that provides the user interface for the Administrator Solution Tools solution. It includes the Dashboard Groups, Components, Data Adapters, Parameters, and Files used to build the solution.

Business Rules

The following business rules are included:

AST_ClearLogsForThreshold
This is an extensibility business rule for the Log Cleaner. This rule provides low impact of clearing functions for all three major log types (Combined Error, User Logon, and Task Activity) within OneStream.

AST_HelperQueries
This is a Dashboard Data Set business rule. This rule can look up lists of user groups and dashboards.

AST_ParamHelper
This is a conditional parameter helper functions Dashboard XFBR String business rule. This rule provides conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

AST_SolutionHelper
This is a Dashboard Extender business rule that provides various helper functions for the Administrator Solution Tools solution.

AST_SolutionHelperBRV
Contains all code logic and change events for the Business Rule Viewer and Member Formula Viewer.

AST_SolutionHelperCommon
Contains common code shared by all business rules, such as working with session state and sorting functions.

AST_SolutionHelperHOM
Contains all code logic and change events for the Home Page Manager.

AST_SolutionHelperLCR
Contains all code logic and change events for the Log Cleaner, including functions that generate log analysis charts.

AST_SolutionHelperMFB
Contains all code logic and change events for the Member Formula Builder.

Settings

The **Settings** page contains the **Global Options** tab in which key properties that guide administration are set, as well as Member Formula Builder and Uninstall Options.

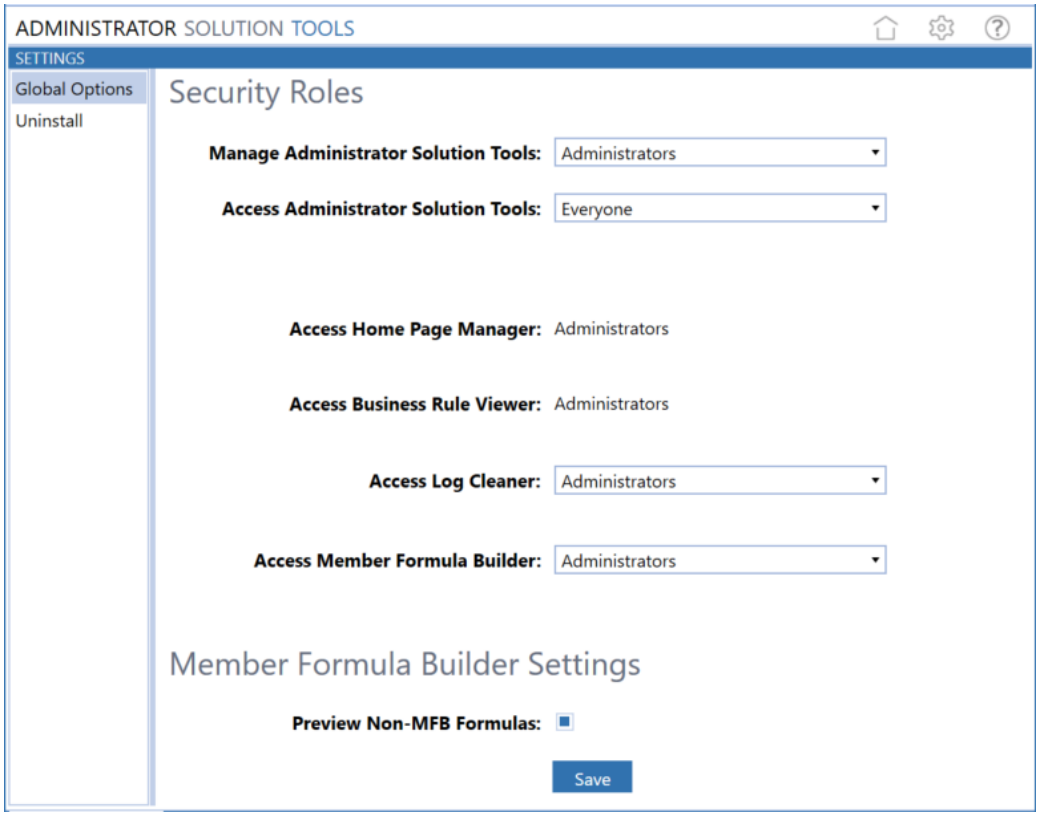
Only an Administrator Solutions Tools Administrator can access the Settings page. Configure the Administrator in Global Options, mentioned in this section and can see and make changes to any Settings page and any solution configuration. They are referenced in this document as “AST Solution Admin.”

Global Options

The **Global Options** page contains key properties that guide global Administrator Solution Tools administration. It should be the first page accessed during the initial setup and configuration of Administrator Solution Tools.

Only an Administrator Solution Tools administrator can access the Administrator Solution Tools Settings page. Set the Administrator in **Global Options**. The Administrator can see and make changes to any Settings page and any solution configuration.

> **Note:** All global option settings are retained during solution upgrades



Note: These same rights apply to any OneStream System Administrator, referred to in this document as the "OneStream Admin." See the *Design and Reference Guide* section on Security for more detail plus a description of the Local Admin concept.

Security Roles

Since security is governed at the global level, it is the assignment of the user group to the Security Role that determines who will be Administrator Solution Tools Administrators globally.

This tool kit is designed with administrators in mind. The default setting for all solutions is the standard Administrators User Group, but this can be changed. It is important to note that anyone in the Administrators User Group is a System Administrator and, by default, can perform any of the same duties as any of the individual solution admins. Therefore, System Administrators will always be able to see and access all solutions within Administrator Solution Tools.

Manage Administrator Solution Tools
Anyone assigned to this User Group is considered a super-user who can configure any aspect of Administrator Solution Tools and are referred to as the Solution Administrator. This user will have access to the Settings page to manage security set up for all tools within Administrator Solution Tools. This user will not have access to any of the individual solutions unless they are part of that solution's access group.

Example: The Administrator Solution Tools administrator may have access to 'Manage Administrator Solution Tools' however they do not have access to 'Access Home Page Manager'. This was done to allow Administrators to hide unwanted solutions from their Administrator Solution Tools Home Page. If allowing Administrator access to all Administrator Solution Tools is desired, create an Administrator Solution Tool Administrator security group located in System > Security > System Security Roles, and add each solution's security access to the Group Membership.

Access Administrator Solution Tools
This group can access the **Administrator Solution Tools** Home page. This security group supersedes any of the ensuing security groups. Therefore, any user who needs to access individual solutions within AST and is part of one, or many, of the groups below, must also be included in this security group first to gain access.

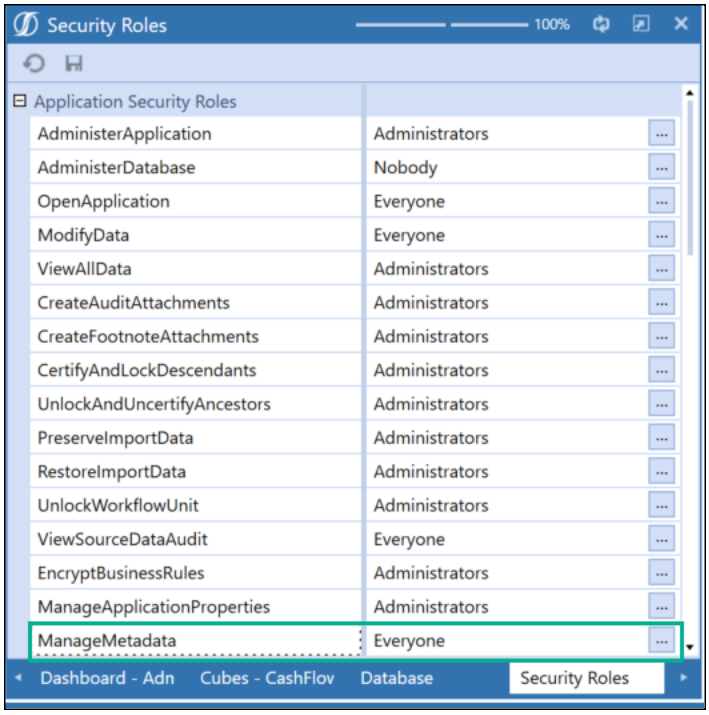
Access Home Page Manager
This group can access the Home Page Manager solution and will be able to assign home pages to users. The Administrator role is required to access and use the Home Page Manager solution, i.e. any user included in the Administrators User Group.

Access Business Rule Viewer
This group can access the Business Rule Viewer and can view Business Rules or Member Formulas. The Administrator role is required to access and use the Business Rule Viewer. The Administrator role includes any user included in the Administrators User Group.

Access Log Cleaner
This group can access the Log Cleaner solution and will be able to execute the clear logs process.

Access Member Formula Builder
This group can access the Member Formula Builder.

Creating formulas is a metadata change. Inherently, belonging to this access group does not inherently allow users to change metadata, such as the Formula property on an Account. Users in this group must also be included in the ManageMetadata security role, found under **Application > Security Roles**. Giving access to manage metadata has other system implications. Therefore it is recommended to limit the number of uses within this access group:

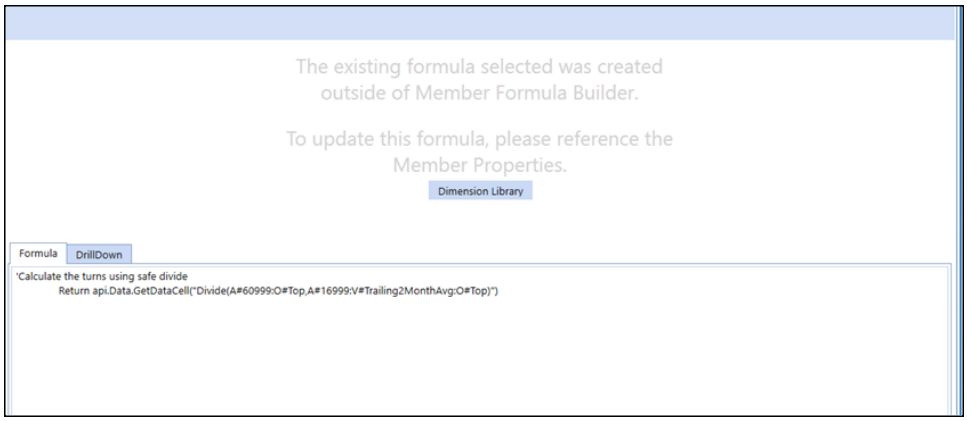


If this User Group is not included in the group for **ManageMetadata**, select the dimension in Dimension Library where edits are desired, select the **Dimension Properties** tab and ensure that this group is included in the **Maintenance Group** for that individual dimension.

Member Formula Builder Settings

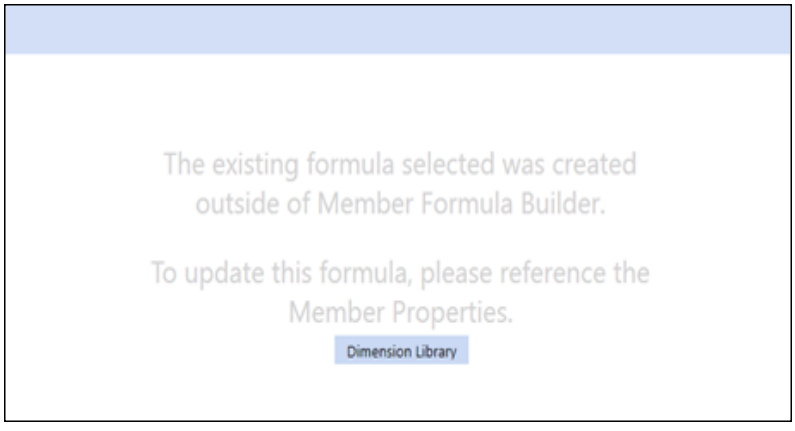
Preview Non-Member Formula Builder Formula
The **Preview Non- Member Formula Builder Formula** check box is enabled by default. When enabled it allows the user to see the formula and drilldown tabs which displays the member formula that was created outside of Member Formula Builder.

> **Note:** This interface is read-only. You can type within these sections; however, no information is saved. Go to the Dimension Library to edit the formula.



See also: The *Member Formulas* section in the *Foundation Guides* chapter of the *Design and Reference Guide* for information on Member Formula fundamentals and using OneStream to design Member Formulas.

When the **Preview Non-Member Formula Builder Formulas** check box in the Administrator Solution Tools Global Settings is not selected, the formula and drilldown tabs do not appear. You must go to the Dimension Library to edit the formula.



Uninstall

The Uninstall feature allows the Administrator Solution Tools User Interface or the entire solution to be uninstalled. Note that if part of an upgrade, any modifications performed on standard Administrator Solution Tools objects will be removed. There are two Uninstall options:

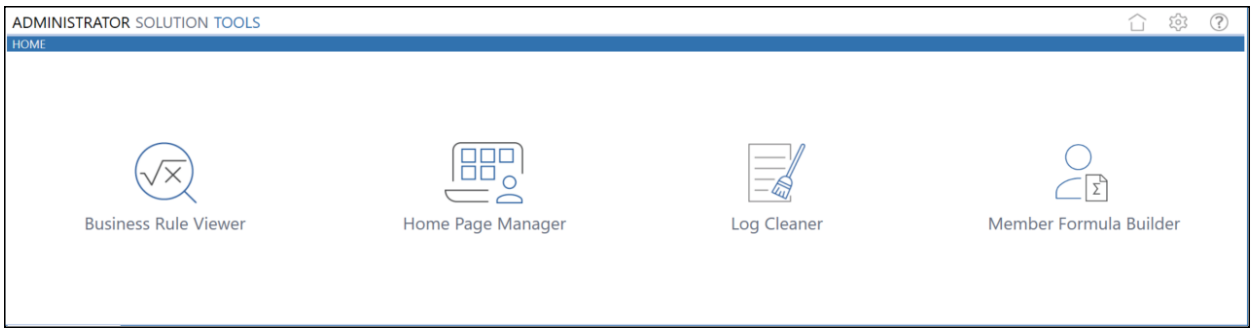
- **Uninstall UI** removes Administrator Solution Tools, including related dashboards and business rules but leaves the database and related tables in place. For some releases, this step should be performed before accepting any new version of Administrator Solution Tools since some of the Dashboards or other objects may have been modified.
    - **Choose this option** if you want to accept a Administrator Solution Tools update without removing the data tables.
    - The Administrator Solution Tools Release Notes will indicate if an overinstall is supported.
- **Uninstall Full** removes all the related data tables, all data, Administrator Solution Tools Dashboards, and Business Rules.
    - **Choose this option** to completely remove Administrator Solution Tools or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

Caution: Uninstall procedures are irreversible

Administrator Solution Tools Dashboard

Access the Administrator Solution Tools dashboard by navigating to **OnePlace > Dashboards > Administrator Solution Tools > Administrator Solution Tools**.

Starting Administrator Solution Tools opens the Administrator Solution Tools Home Page. The icons that display on this page are based on security roles specified in **Global Options**. Use this page to start the different tools in Administrator Solution Tools that you have permission to access. To go back to the Administrator Solution Tools Home page, select the **Show Home Page** icon in the top toolbar.



View Business Rules and Member Formulas

The Business Rule Viewer lets you view any business rule or Member Formula created in OneStream.

To launch the Business Rule Viewer, select the Business Rule Viewer icon on the Administrator Solution Tools home page.

Business Rules

A Business Rule is a VB.Net class that performs a function or set of functions in OneStream. Each Business Rule is an independent object encapsulating VB.Net code. Business Rules are created using the Business Rule Editor found under Application Tools. Any business rule created in OneStream can be viewed in the Business Rule Viewer.

See also:

- The *Business Rules* section in the *Foundation Guides* chapter of the *Design and Reference Guide* for information on Business Rule fundamentals, organization, framework, and other details.
- The *Business Rules* section in the *Application Tools* chapter of the *Design and Reference Guide* for details on using OneStream to design Business Rules.
- The *OneStream API Overview Guide*, *OneStream API Details*, and database documentation from MarketPlace for Business Rule engine details.

Member Formulas

A Member Formula is assigned to a Dimension Member and executes in the Finance Engine during Cube processing.

Member Formulas are created directly on a Dimension Member in the Dimension Library or with the Administration Solution Tools Member Formula Builder. Member formulas created using the Member Formula Builder can be edited in the Member Formula Builder, but Member Formulas created using the Formula Editor in the Dimension Library can only be edited in the Dimension Library.

See also:

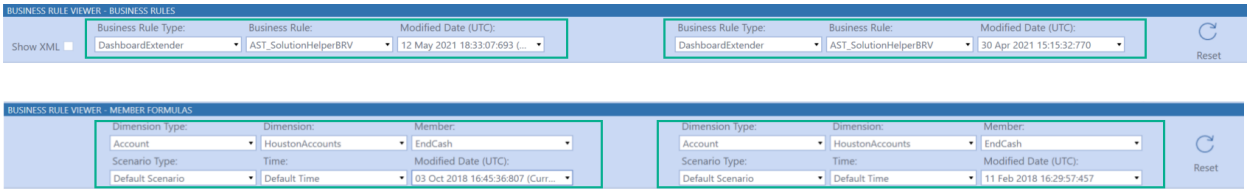
- Build Simple Member Formulas in OneStream
- The Member Formulas section of the Foundation Guides chapter of the *Design and Reference Guide* for information on Member Formula fundamentals and using OneStream to design Member Formulas.

Select a Business Rule or Member Formula to View

The Business Rule viewer lets you view Business Rules or Member Formulas side-by-side. It's most useful for viewing two versions of the same Business Rule, Member Formula, or similar rules or formulas.

Use the dropdowns in the Business Rule Viewer's Business Rules and Member Formulas pages to select the Business Rule or Member Formula you want to view. The dropdowns are filters to help organize and quicken your search. Selecting a value in a dropdown filter determines the available values in the next dropdown. For example, if you are searching for a Member Formula to view and you select **Flow** as the dimension type, only the dimensions belonging to that dimension type display in the Dimensions dropdown.

The following shows the Business Rule Viewer dropdown list boxes for Business Rules and Member Formulas.



The left and right areas are connected, so when you select a value on the left, the Business Rule Viewer automatically populates the same field on the right with the same value.

See also: Connected and Disconnected Viewing Panes for more information on how the viewing area works.

When you select a value for **Modified Date (UTC)** on the left, the Business Rule Viewer displays the rule or formula you want to view in the left textbox. It also selects and displays the next most recent version (if one exists) in the right text box. If the next most recent version of the Business Rule or Member Formula shows as deleted, the next most recent version displays on the right. The Business Rule Viewer assumes that you want to view a selected rule's most recent version and the next most recent version in the side-by-side viewing areas.

> **Note:** If a Business Rule or Member Formula does not have an earlier version to display, or there is only one version of the Business Rule or Member Formula, the text **No previous business rule to display** appears in the viewing area.

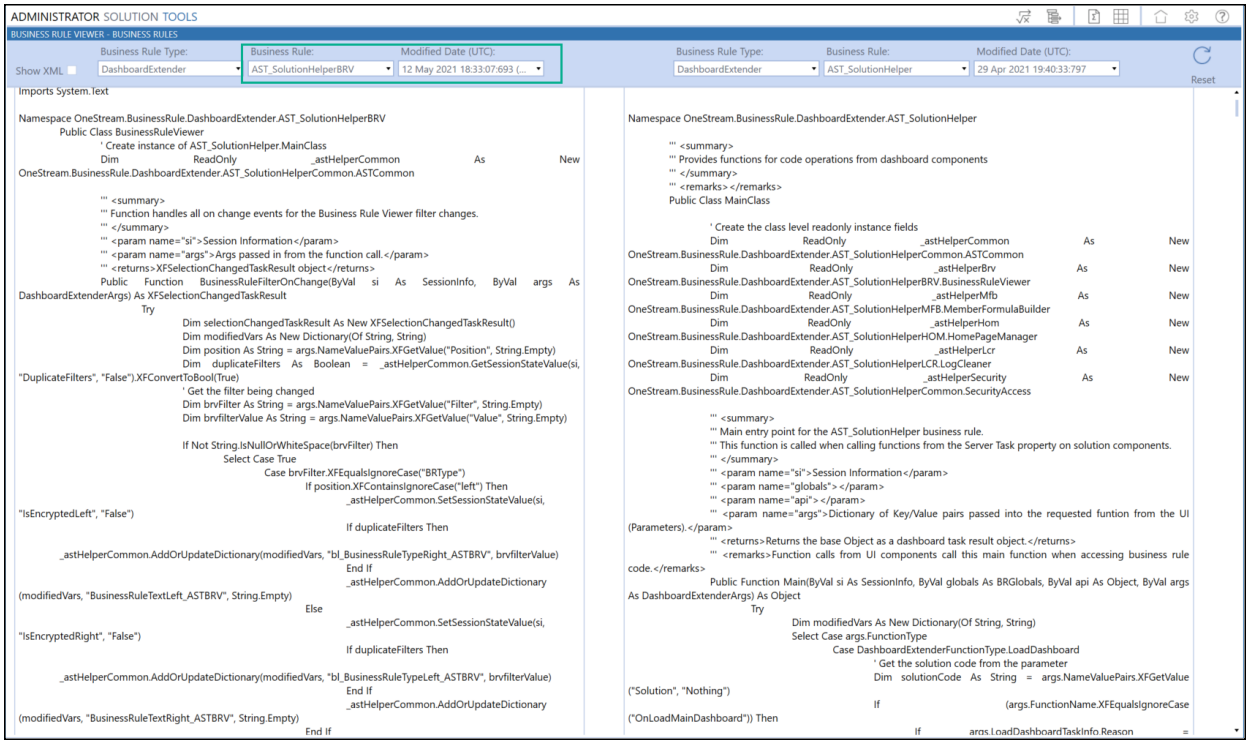
Connected and Disconnected Viewing Panes

When you select a Business Rule or Member Formula to view, the left side shows the selected version and the right side shows the next most recent version. The views are connected, so the left and right side scroll together.

If you change a dropdown value on either side, the sides are no longer connected and work independently. When the left and right sides are disconnected, you can can use the filters independently to view different Business Rules or Member Formulas.

> **Note:** The sides scroll together even when viewing different Business Rules or Member Formulas.

The following image shows different Business Rules displayed in the left and right views of the Business Rule Viewer.



Click **Reset Filters** to reconnect the left and right views. This clears the dropdown filters on both sides, initiating the connection of the left and right views.

View a Business Rule

1. In the left Business Rule Type dropdown, select the type of the Business Rule you want to view.

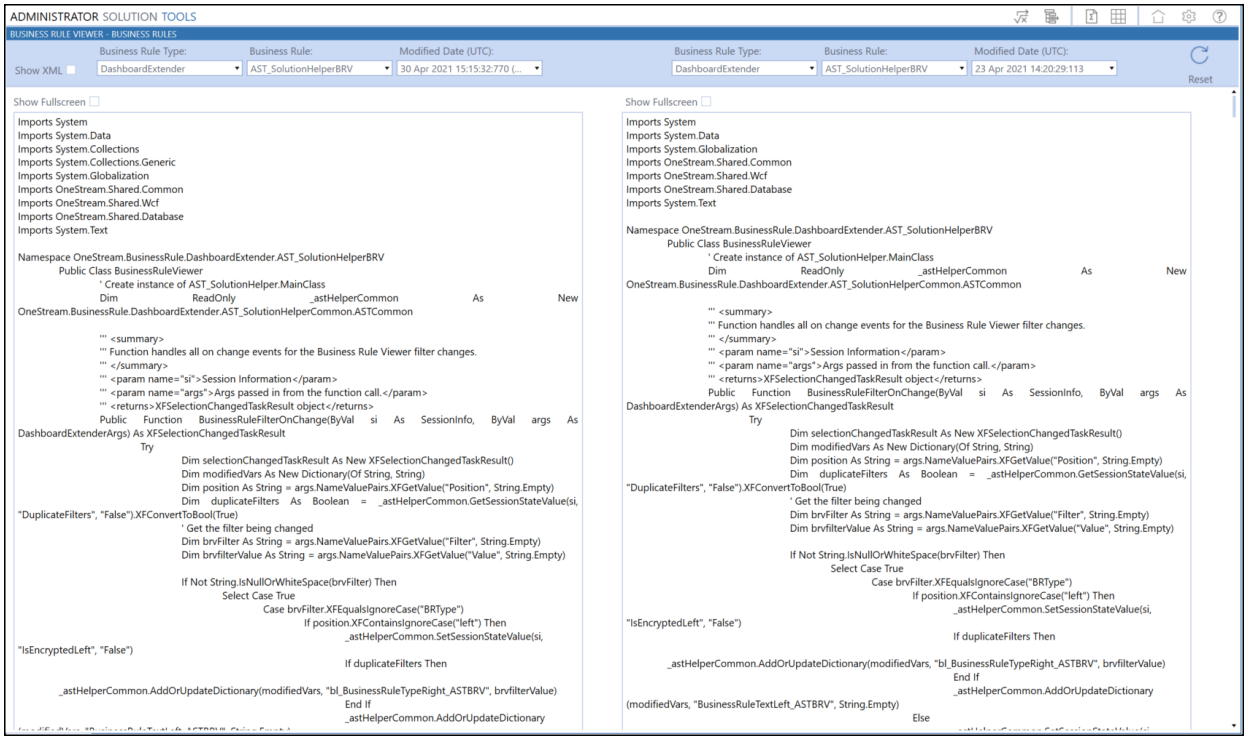
   See also: *Business Rule Properties* in the *Design and Reference Guide* for a detailed description of each Business Rule type.

2. In the left Business Rule dropdown, select the Business Rule to view. Only Business Rules belonging to the specified rule type display in the list.

3. In the left Modified Date (UTC) field, select the version of the business rule you want to view.

> **Note:** Business Rules that are encrypted include the text **(encrypted)** in the Modified Date (UTC) value. Encrypted business rules do not display in the Business Rule Viewer. When you select an encrypted business rule, the text **Selected business rule is encrypted** displays in the viewing area.
>
> **See also:** *Business Rule Encryption (Decryption)* in the *Application Tools* section of the *Design and Reference Guide* for more information on encrypting and decrypting a Business Rule.

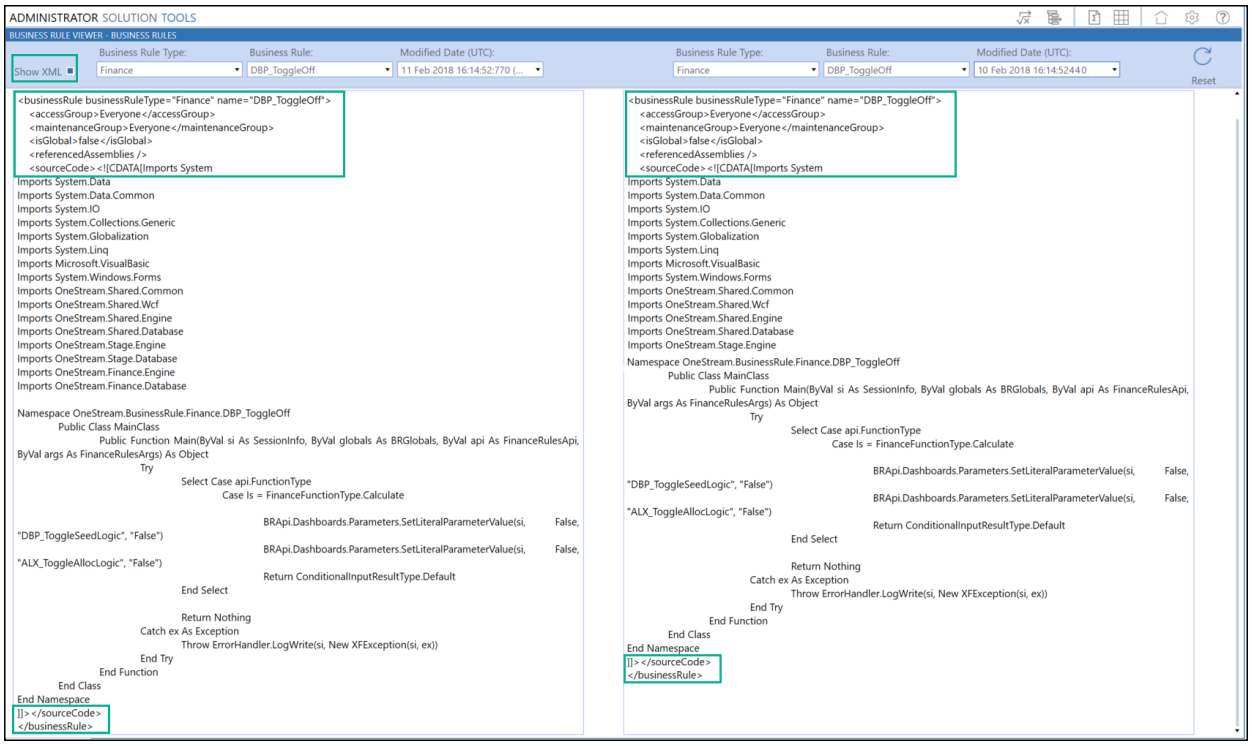
In the following example, the most recent version of the AST_SolutionHelperBRV Business Rule displays on the left, with the next most recent version of the same rule on the right.



The left and right sides are connected and scroll together, making it easy to view them.

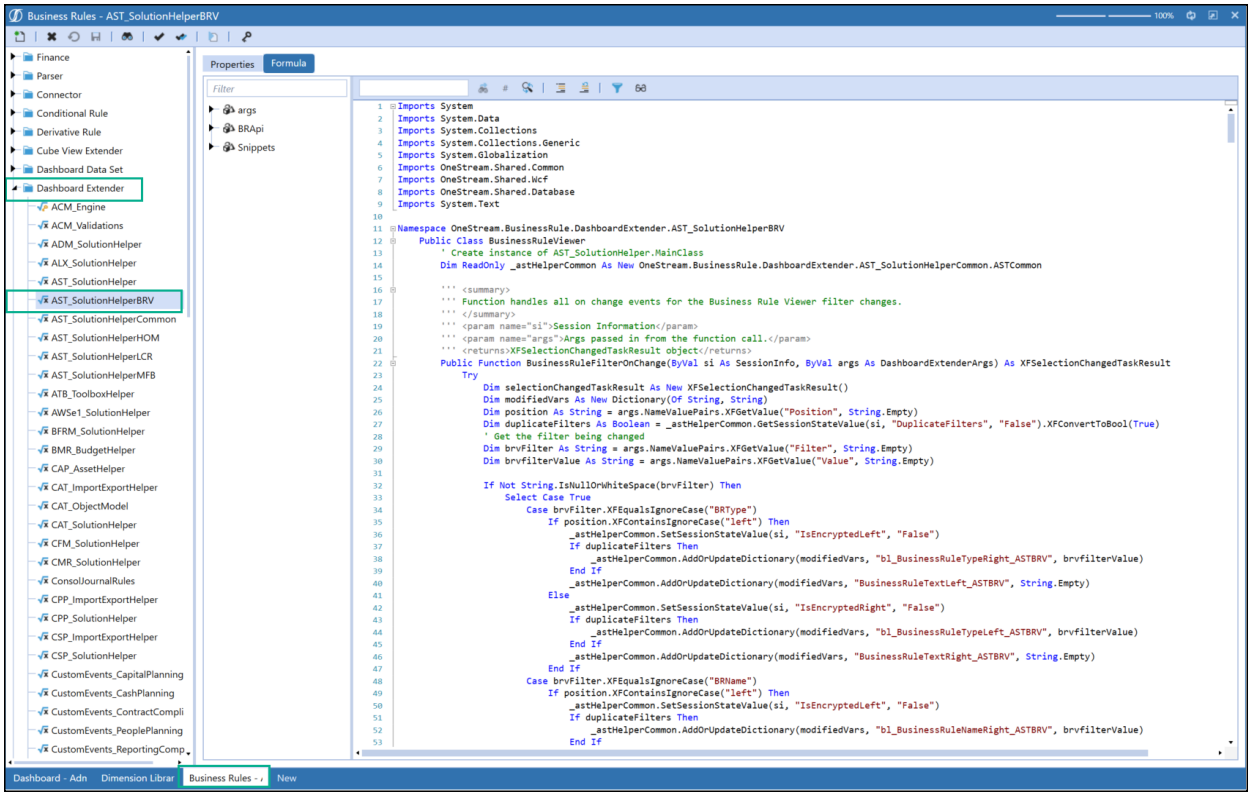
View Business Rule XML

By default, Business Rules do not show the XML code at the beginning and end of the rule. You can display the XML code for selected Business Rules by clicking **Show XML** in the desired view. The Business Rule Viewer keeps the displayed rules connected if you show the XML code.



Access the Business Rule Source

When viewing Business Rules, you may want to make edits to the rule itself. To do this, click the **Show Business Rule Page** button. The **Business Rule** page displays in a separate tab. Use CTRL + A to highlight the rule to copy and paste, then navigate to the business rule you want to edit.



See also: *Business Rules* in the *Application Tools* chapter of the *Design and Reference Guide* for information on using the **Business Rule** page in OneStream to create and edit Business Rules.

View a Member Formula

Use the Member Formula viewer to view all current and historical Member formulas.

To view a Member Formula in the Member Formula Viewer, specify filtering information in the left side dropdowns to find and display the Member Formula.

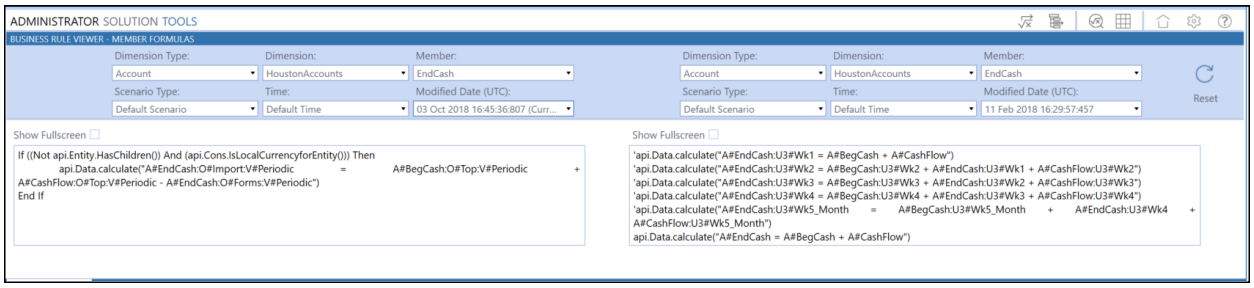
Important: You can only access the Member Formula Viewer from the Business Rule Viewer.

1. To access the Member Formula Viewer click the **Show Member Formula Viewer Page** button.
2. In the left Dimension Type dropdown, make selections from these options for the member formula you want to view:

   - **Dimension Type:** Select the dimension type for the member whose member formula you want to view.

     Dimension Types are used to group dimensions and includes User-Defined dimensions. Only Dimension Types used display in the list.

   - **Dimension:** Select the Dimension containing the member whose formula you want to view. Only dimensions belonging to the specified Dimension Type display in the list.
   - **Member:** Select the member of the Member Formula you want to view.
   - **Scenario Type:** Select the Scenario Type associated with the member formula you want to view. Select**Default Scenario**if the Member Formula applies to all scenario types. A scenario type can contain multiple scenarios.
   - **Time:** This list contains the Time Profile for the selected Scenario Type. Select the Time for the Scenario Type containing the Member Formula you want to view.
   - **Modified Date (UTC):** Select the version of the Member Formula you want to view.

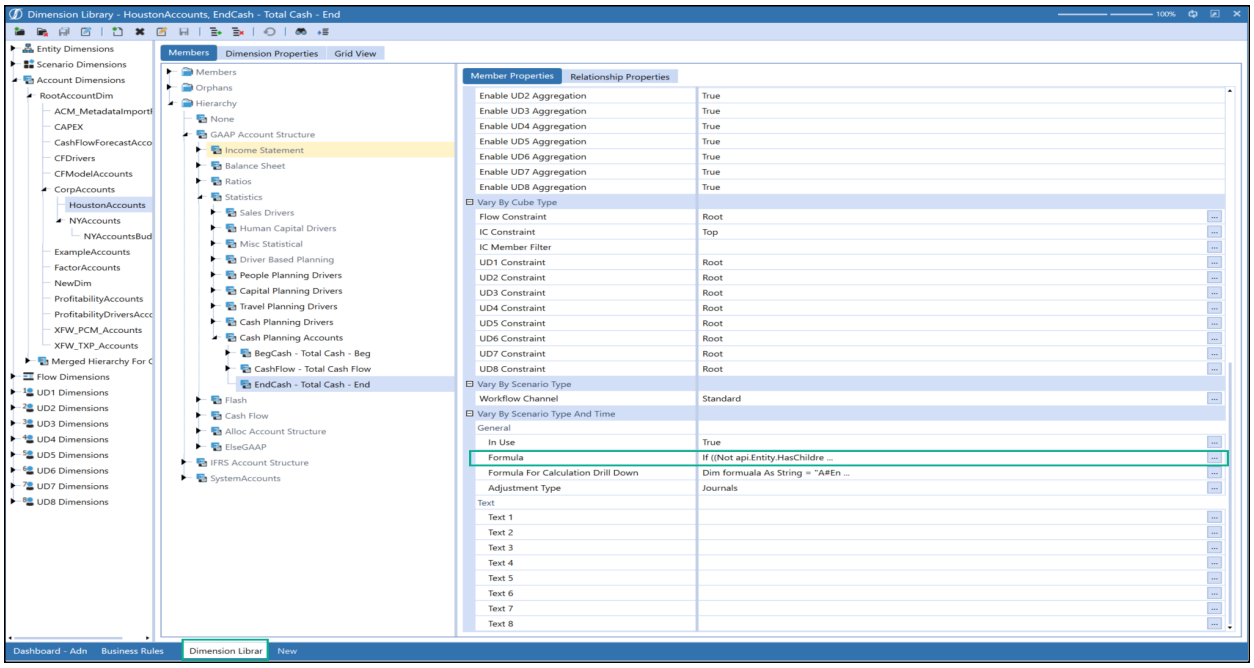


The left and right sides are still connected, so the left and right sides scroll together, making it easy to compare them.

Access the Member Formula Source

When viewing a member formula, you may want to make edits to the member Formula.

You can access the Dimension Library while working in the Member Formula Viewer. Copy the text using CTRL + A then click the **Show Dimension Library Page** button. The Dimension Library displays in a separate tab, and displays the most recently accessed member properties. In the Members tab of the Dimension Library, navigate to the member formula you want to edit.



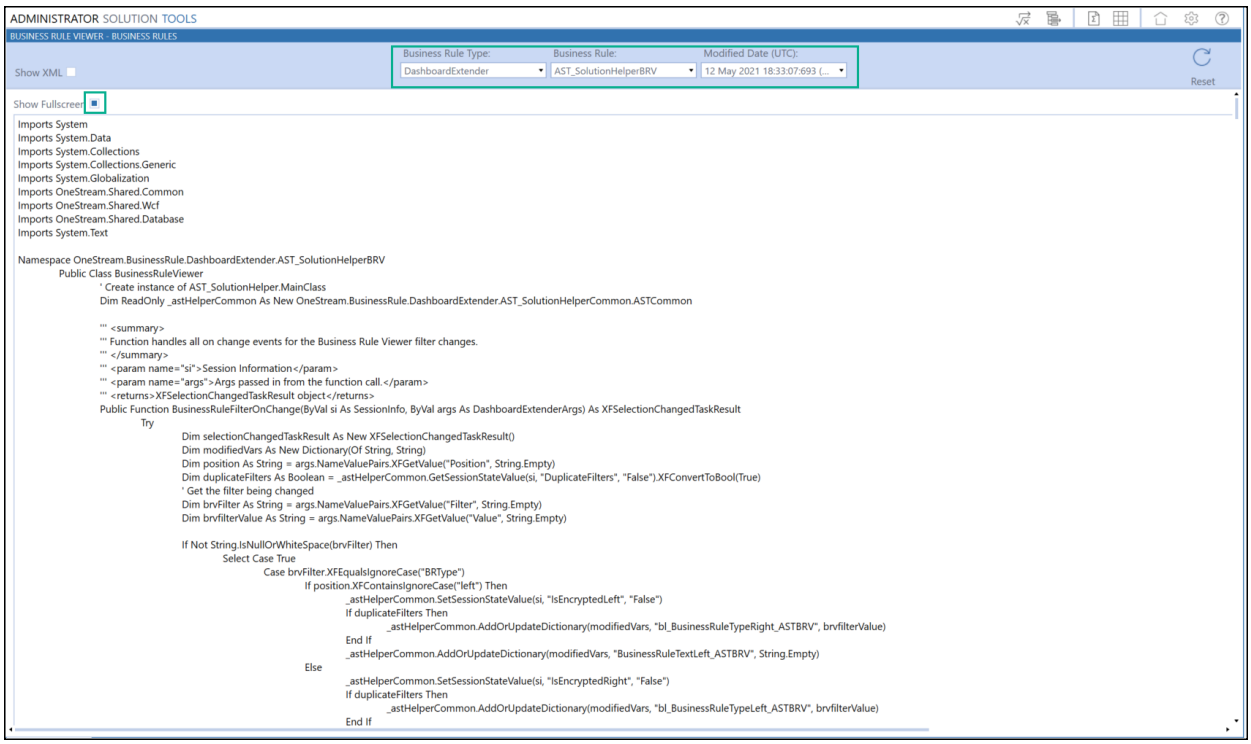
See Also: *Member Formulas* in the *Foundation Guides* chapter of the *Design and Reference Guide* for information on using the Member Formula Editor in OneStream.

View a Single Business Rule or Member Formula

The text box sizes for the side-by-side view in the Business Rule viewer may cause lines in a Business Rule or Member Formula to display on two or more lines, making it difficult to read.

You can show the Business Rule or Member Formula in Fullscreen mode providing more room for the Business Rule or Member Formula to display.

To do this, click the **Show Fullscreen** checkbox at the top of the viewer.



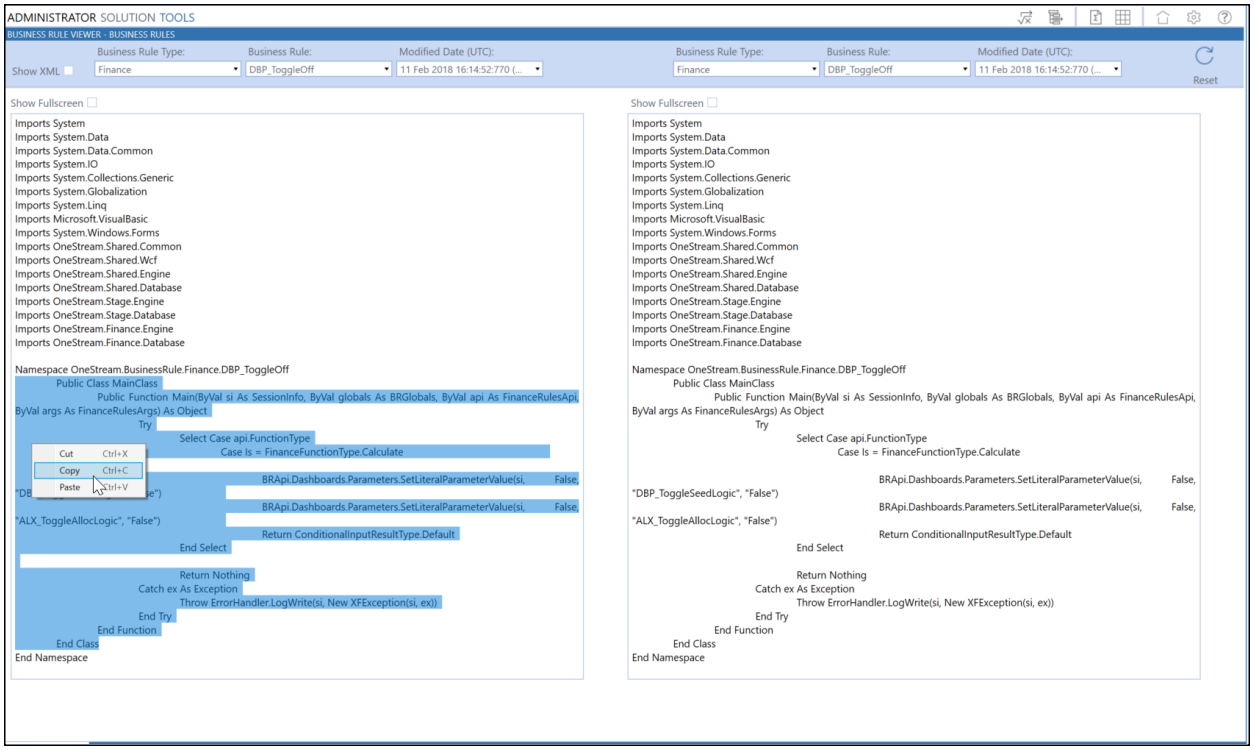
Only the dropdown fields used to select the individual Business Rule or Member Formula are visible.

Toggling between Fullscreen view and the standard view does not disconnect the left and right side filter values. For example, if you reset the filter values and then switch back to the standard view,, the left and right sides scroll together.

Copy a Business Rule or Member Formula

You can copy any text in the left or right view. This is useful when you want to edit or replace a Business Rule or Member Formula .

To copy text in a Business Rule or Member Formula, select the text, and then CTRL+C to copy. To select the entire rule use CTRL+A.



Viewing Business Rule and Member Formula Change Histories

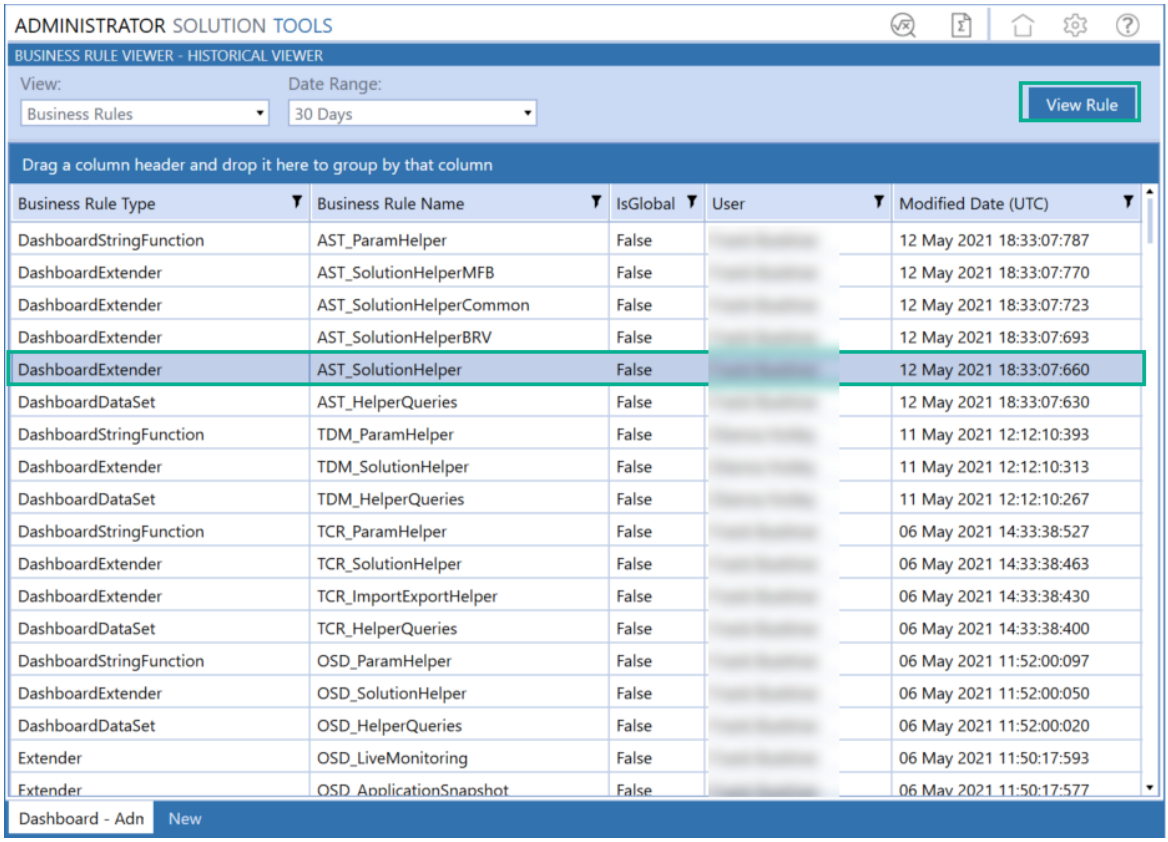
Use the Business Rule Viewer - Historical Viewer to determine when Business Rules or Member Formulas were updated and who made the updates.

From the Business Rule Viewer for Business Rules or Member Formulas pages, click **Show History Page** to display the viewer and access the change histories.

Clicking the **Show History Page** icon while viewing Business Rules displays the Business Rule history. Clicking the **Show History Page** icon while viewing Member Formulas displays the history for Member formulas. Historical data displays in a grid, allowing you to group records using the grid capabilities.

1. From **View**, select Business Rules or Member Formulas.
2. In the **Date Range** field, select the number of days from today to display historical records. For example, to display the last 30 days of changes, select 30 from the list.

> **Tip:** The records listed in the grid change based on your selections.



3. To view a Business Rule or Member Formula, select it in the grid and click the **View** button. This lets you view the Business Rule or Member Formula in the respective viewer.

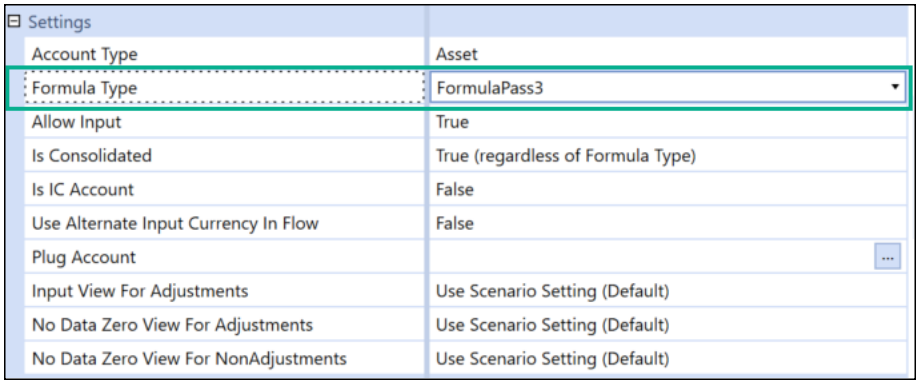
Build Simple Member Formulas

The Member Formula Builder lets you create basic member formulas. If you need a complex formula, create it in the Dimension Library.

See also: The *Member Formulas* section in the *Foundation Guides* chapter of the *Design and Reference Guide* for information on Member Formula fundamentals and using OneStream to design Member Formulas.

To launch Member Formula Builder, select the Member Formula Builder icon on the Administrator Solution Tools **Home** page.

Before building a member formula, the member must already exist and the Formula Type, either stored or dynamic, must be established as part of the Member properties settings. To select the Formula Type, navigate to **Application > Dimensions**, select the member, select the **Member Properties** tab, and then select the Formula Type under **Settings**.



Use FormulaPass1 – FormulaPass16 for stored formulas. Use DynamicCalc and DynamicCalcTextInput for dynamic formulas.

Formula Build Process

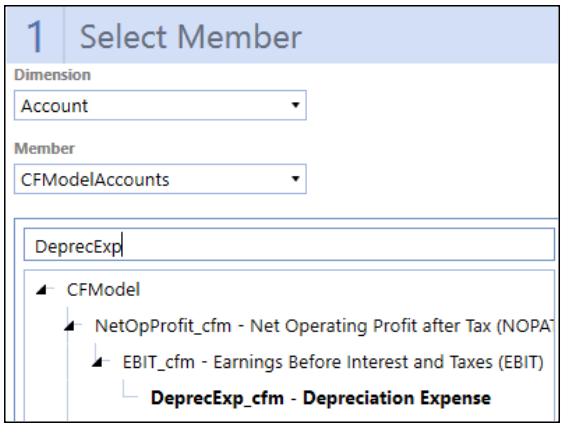
To build a Member Formula:

- Select the dimension, member, and account you want to create the member formula.
- Select Scenario Type and Time properties for the formula.
- Build the formula and add calculation filters.

Select the Member

Select the dimension from the drop-down and then select the member.

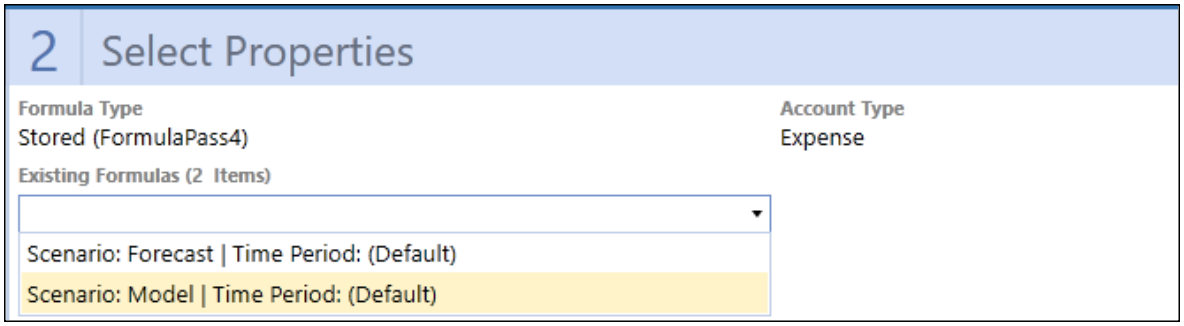
> **Tip:** To access a known member, use the search bar at the top of the Select Member pane to find the member or you can navigate through the hierarchy to find the appropriate member.



After you select a dimension, member, and account member for your formula, the other panes of the Member Formula Builder appear and you can continue the formula build process.

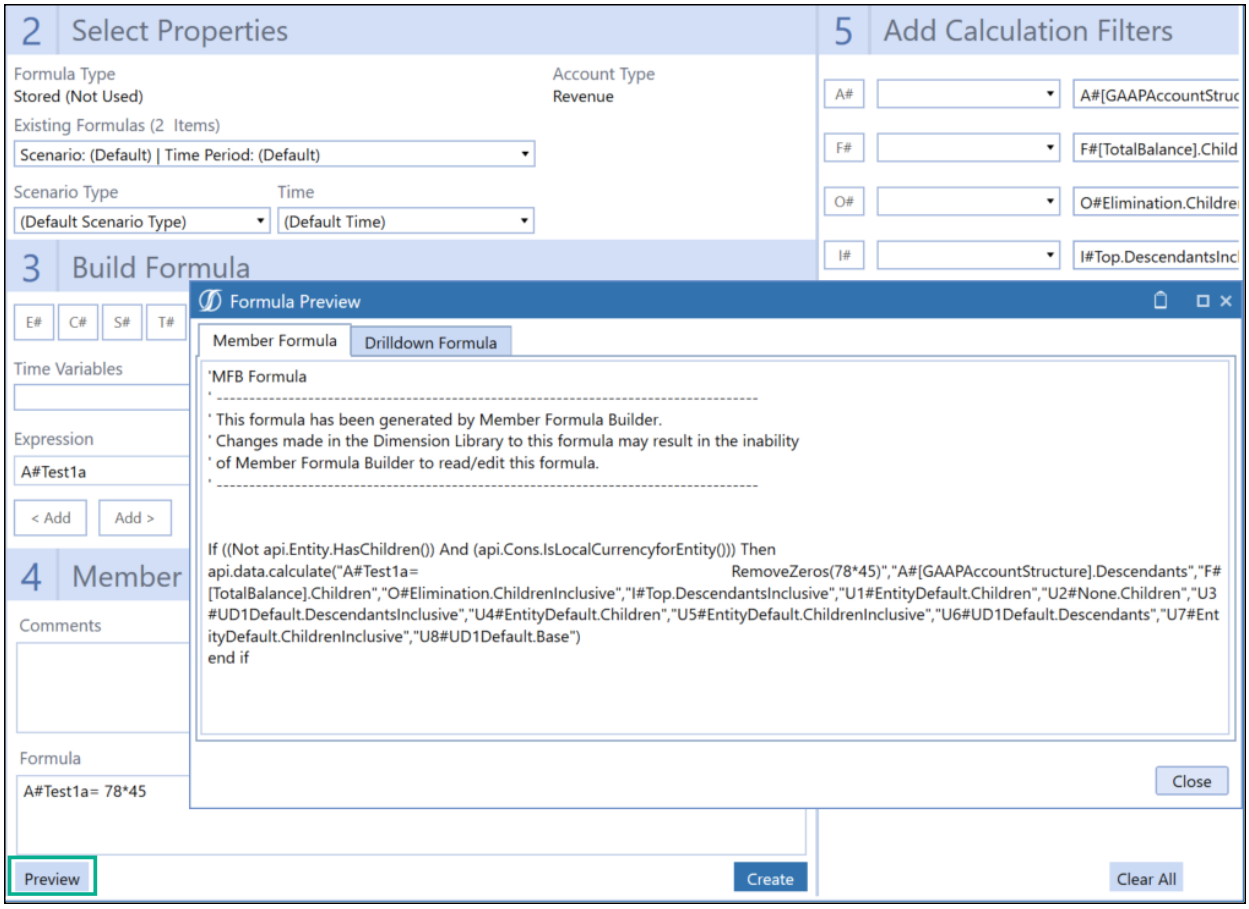
Select the Properties

In the Select Properties pane, the Formula Type and Account Type labels show the formula or account type currently assigned to the selected member. The Existing Formulas dropdown defaults to show **Scenario: (Default)|Time Period: (Default)** and displays other existing formulas on the selected member. If you select the default Scenario and Time formula, the Scenario Type and Time display as (Default Scenario Type) and (Default Time) respectively.

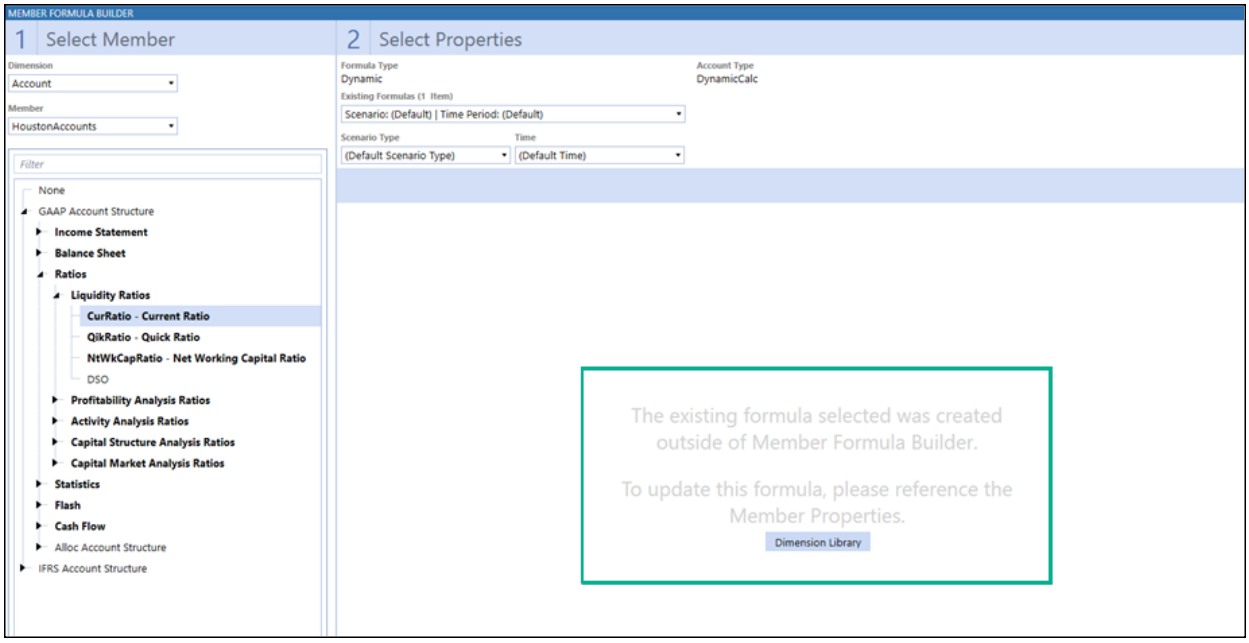


Select the scenario and time to apply to the formula.

If there is already a formula associated with the member, you can preview the formula before making any changes. Click **Preview** to display the existing formula.

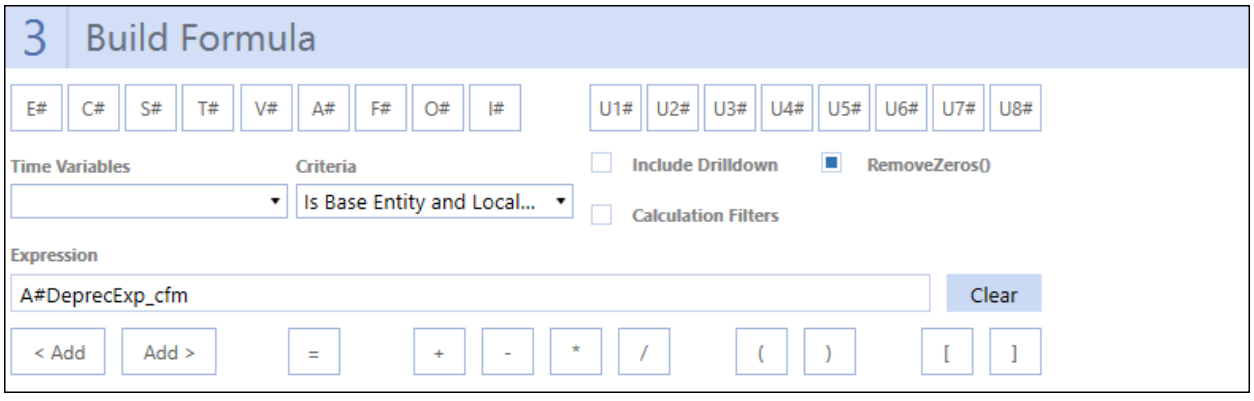


You cannot edit a formula in the Member Formula Builder if it was created outside of the Member Formula Builder. Users in the Administrator role can edit formulas created outside of the Member Formula Builder in the Dimension Library. Click the Dimension Library button to go to the Member Properties, where you can edit the formula. Those that do not have access to edit in the Dimension Library do not have access to this button.



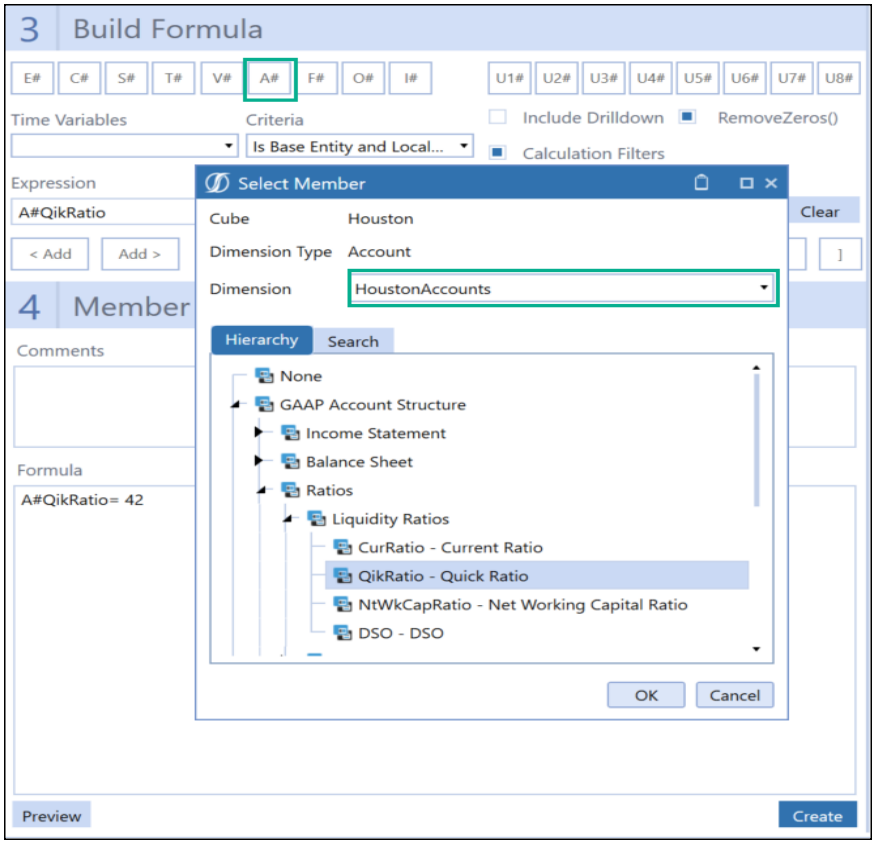
Build the Formula

Use the Build Formula section to create a simple member formula.



Dimension Icons

When you select a dimension icon, the **Select Member** dialog appears so you can select the appropriate member from the hierarchy.



Time Variables

These are sample Time Functions that can be used to create a formula and were included for ease of formula creation. Items selected from this dropdown are added to the Expression. For more information on Time Functions and their use, see the *Design and Reference Guide*.

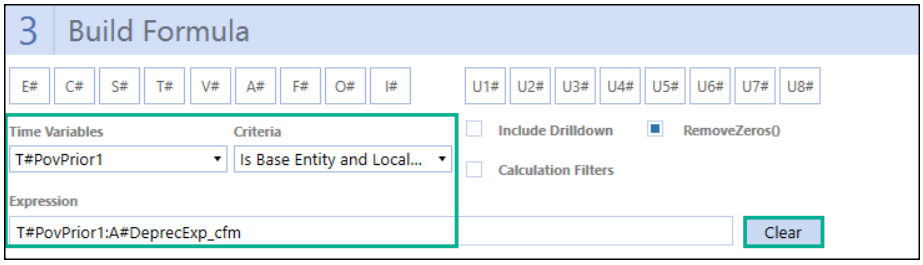
Criteria

Defines the dimension to which the formula is applicable. If a criteria is selected from the dropdown, it will not show in the Member Formula text box but can be seen in the **Preview** dialog.

Expression

This text box shows the selected dimensions or time functions selected. For stored formulas, the expression automatically populates for the member selected in the Select Member pane to help start the stored formula creation. Any text that is entered here can be cleared using the **Clear** button.

Clear
The **Clear** button is used to clear the **Expression** text box.



Add
There are left and right **Add** buttons which determine whether to place the expression before or after the Member Formula. Click the appropriate **Add** button to add the content currently in the **Expression** text box to the specified place in the **Member Formula**.

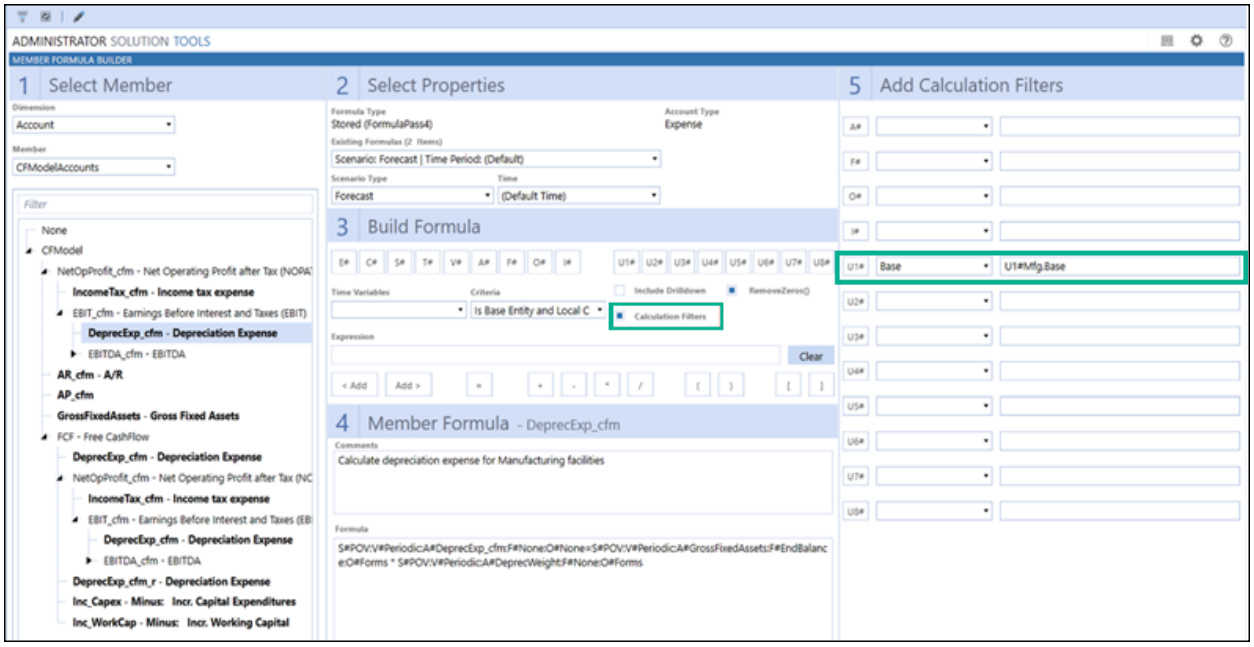
Calculation Filters
Only appears for stored formulas. This option lets you build calculation filters based on dimensions. Selecting this check box displays the Add Calculation Filters pane that lets you add filters that are calculated only if certain criteria are met.

To add a calculation filter:

1. Under **Build Formula**, select the **Calculation Filters** check box to open the **Add Calculation Filters** pane.
2. In the **Add Calculation Filters** pane, click on the the desired dimension button. The **Select Member** dialog displays.
3. Use navigation in the **Hierarchy** and **Search** tabs to select a member to apply the calculation filter to.

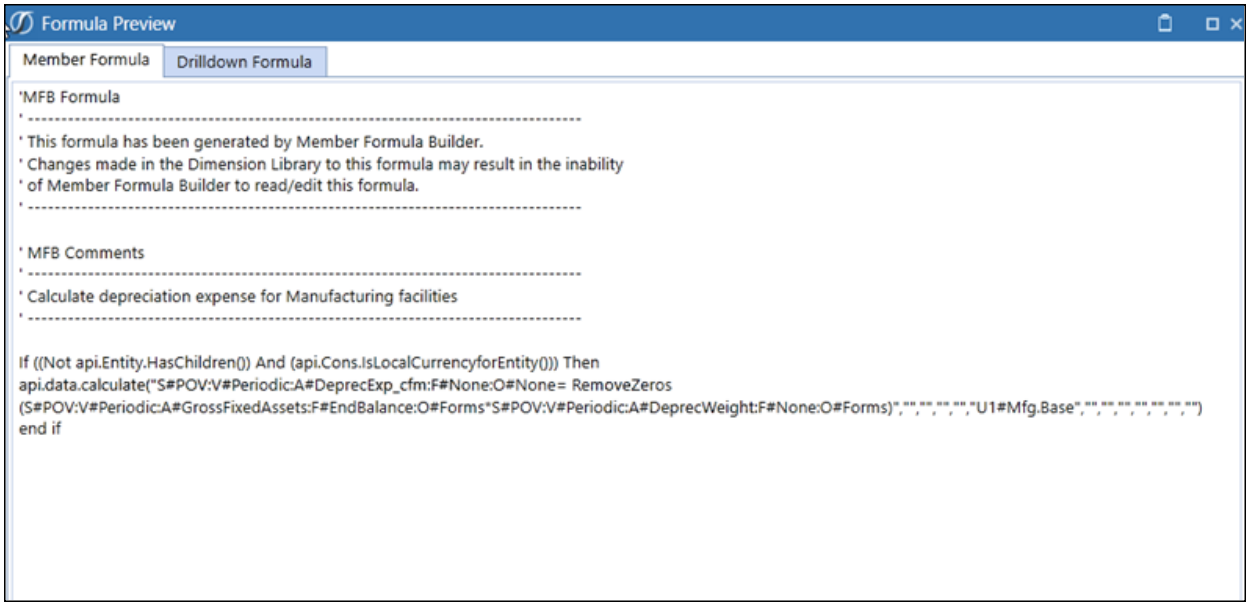
   Tip: You can use the **Select Member** dialog to select multiple members to apply a calculation filter to.

4. Click **OK** to close the **Select Member** dialog and return to the **Add Calculation Filters** pane. Selected members are added to the calculation filter.
5. Select the expansion from the dropdown next to the selected dimension.



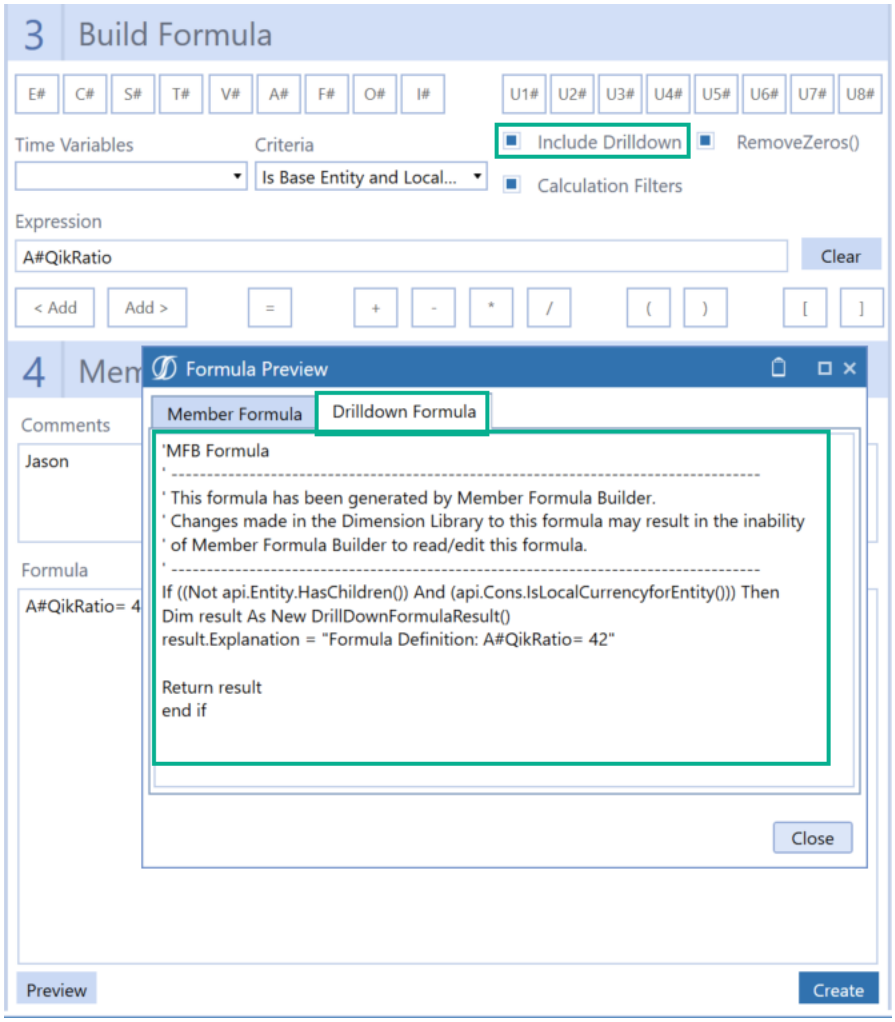
In the previous example, the formula first runs on the UD1 base members under the **U1#Mfg.Base** dimension. The calculation filter is added by selecting the U1# icon, then selecting the member from the Select Member dialog. The appropriate expansion is added by selecting from the drop-down .

Criteria defined in the text boxes are automatically saved and are part of the formula creation. You can see the calculation filters as part of your formula by clicking **Preview**.



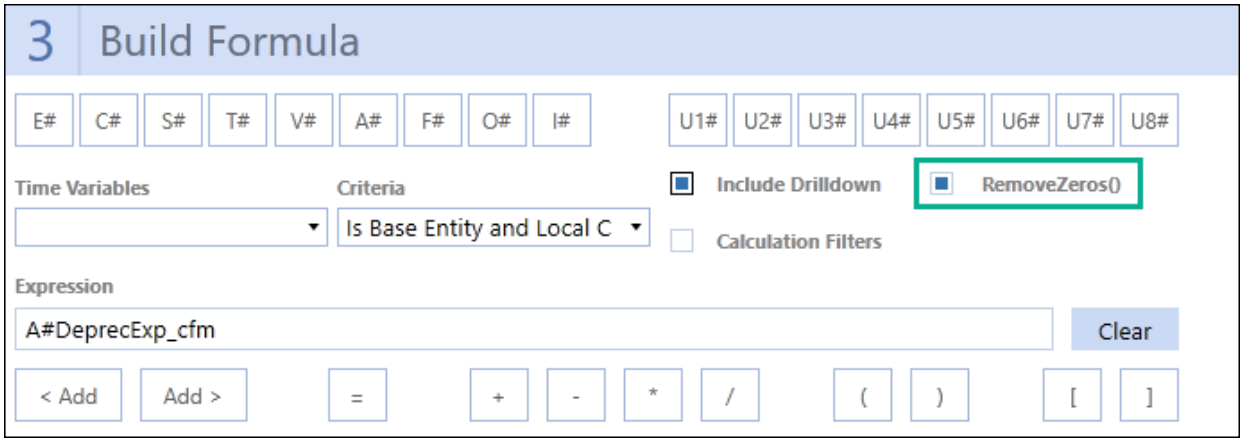
Comments
Use this to include a description for the formula.When you preview the formula, you can also review the comments.

Include Drilldown
Selecting this checkbox allows drilldowns on the field for which the formula is being created. This also allows you to edit the drilldown formula, which displays in the Drilldown Formula tab of the Formula Preview.



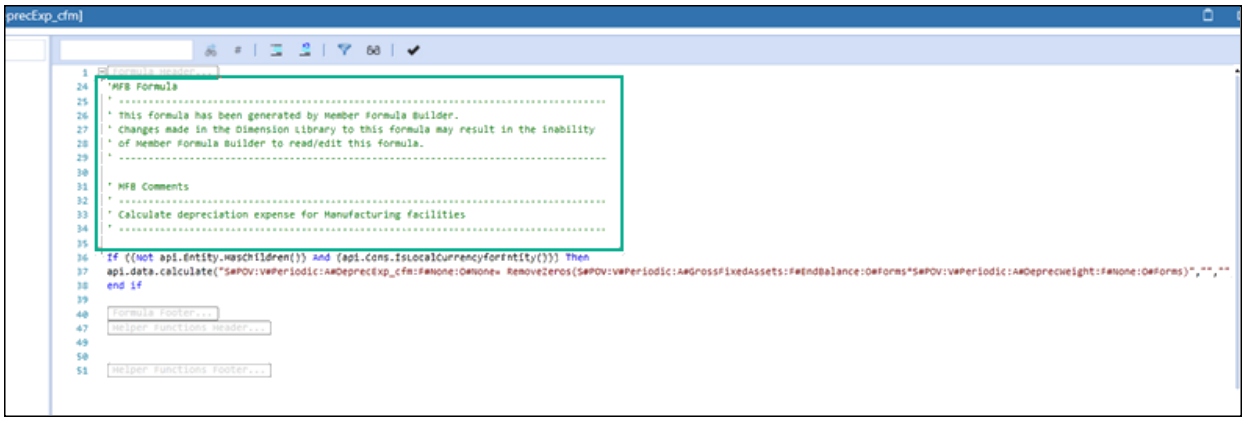
RemoveZeros()
The RemoveZeros() function can be used to evaluate a source data buffer and remove all zeros in cells where the amount is zero whether or not it is flagged as a NoData cell. This function is important to use for performance purposes and therefore is enabled by default.

See also: The *Design and Reference Guide* for more information on the RemoveZeros() function.

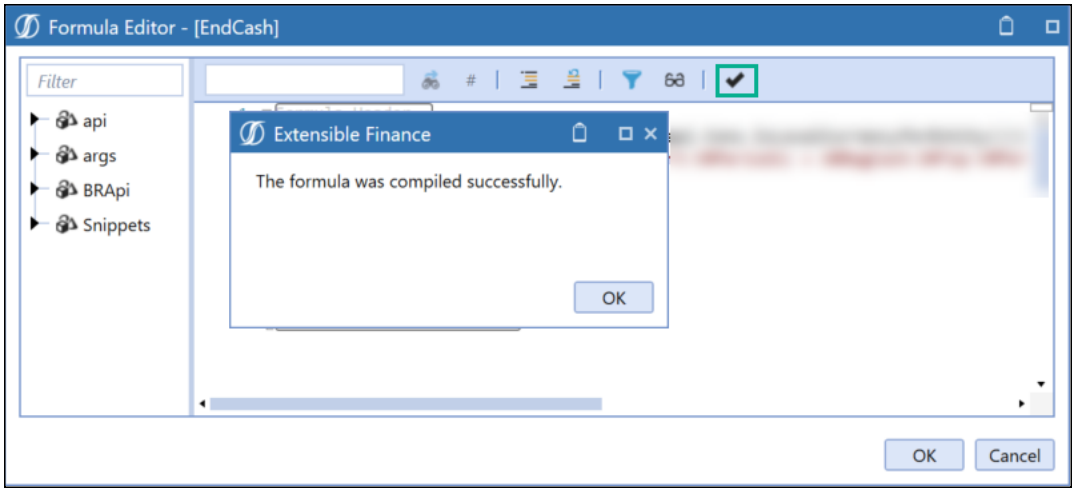


Add Formula Complexity

You can use the Formula Editor to add complexity to a formula originally created in Member Formula Builder outside of the solution (such as creating multi-line rules). It is recommended that you remove the Member Formula Builder syntax within the business rule. This removes the ability for formula creators to see and update complex rules in the Member Formula Builder.



Note: It is recommended after building a formula, to go back to the Dimension Library and performing a compile using the **Compile** button on the Formula Editor's toolbar to make sure that the VB.NET syntax is correct.


Formula Editor - [EndCash]
Filter
api
args
BRApi
Snippets
Extensible Finance
The formula was compiled successfully.
OK
OK
Cancel

Manage Home Pages for Users

The **Home Page Manager** page allows Administrators to assign users or user groups to a default Home Page that displays when logging onto OneStream. To launch **Home Page Manager**, select the icon on the **Adminstrator Solution Tools** home page.

The Home Page Manager lets you assign a default page to any user or user group. By default, only users who are part of the Administrators User Group can access the Home Page Manager, and only Administrators can change this setting.

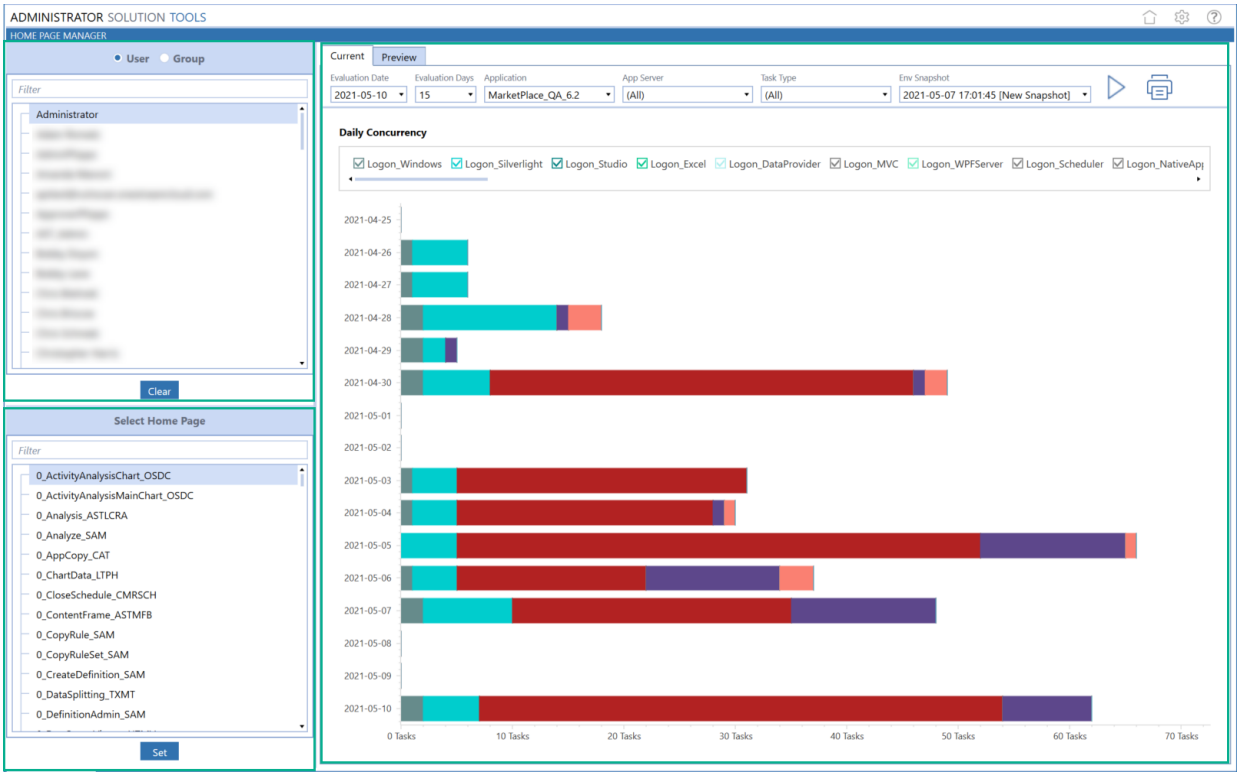
See also: The Access Home Page Manager setting in Settings for more information.

Users and User Groups are part of system security and are defined in OneStream.

See also: *System Security Users and Groups* in the *System Administration* chapter of the *OneStream Design and Reference Guide* for more information about creating users and user groups.

The Home Page Manager includes the following:

- A User/User Groups pane where you indicate if you are making an assignment for a single user or all users belonging to a specified user group.
- The **Select Home Page** pane, where you select the home page and assign it to the user or user group.
- The Home Page Viewer pane shows the currently assigned home page for a user (if any) in the **Current** tab, and a **Preview** tab that displays the currently selected home page. You can easily switch between these tabs to see current user home page assignments and preview other home pages to assign.



Assign a Home Page

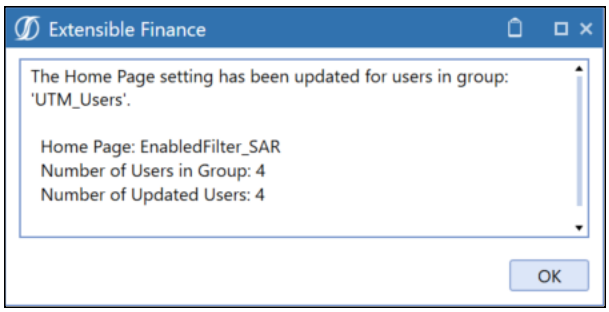
1. Use the radio buttons on the upper left pane to set whether the home page assignment is for a user or a user group.

   If a user already has a home page assigned, the **Current** tab in the **Home Page Viewer** pane shows the page assigned to the user. For both Users and User Groups, if a home page has been previously assigned, use the **Clear** button to unassign the current home page. See Change a Home Page Assignment to learn how.

2. In the **Select Home Page** pane, select the home page you want to assign from the list. The selected home page displays in the **Home Page Viewer** pane's **Preview** tab.

3. Click **Set** to assign the home page to the selected user or user group. A message box indicates that the Home Page setting has been updated. For user groups, the message also includes the number of users in the group and information about any errors during processing. See Respond to Processing Errors for more information about processing

errors.



Tip: The **User/User Group Selection** pane and the **Select Home Page** pane include a text filter box you can use to search for users, user groups, and home pages.

Change a Home Page Assignment

1. Select the user or user group whose home page assignment you want to change. The currently assigned home page displays in the **Current** tab of the **Home Page Viewer** pane.
2. Click **Clear** to clear the current home page assignment for the selected user.
3. Use the **Select Home Page** pane to navigate to the home page you want to assign, and then click **Set.**

Assigning a Home Page: Example

Below is an example of how to set up Homepage Manager for a group or individual users.

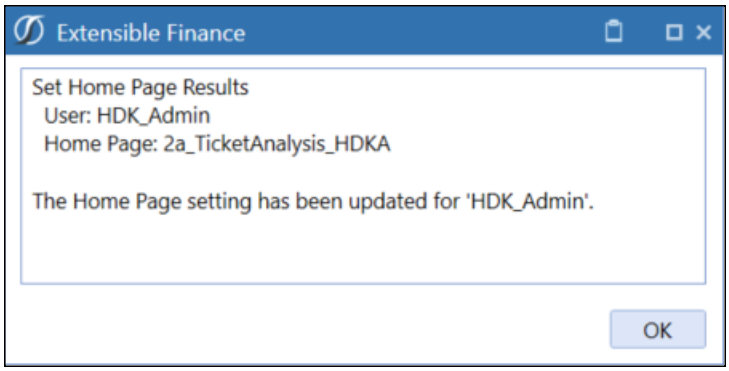
Note: Your application may have different groups and dashboards since this is based on our example application.

1. Select the **User** radio button.
2. Type HDK in the first Text Filter search box for the user group/user selection to find all users with HDK in the name. Click on the HDK_Admin user to select it.
3. Enter HDK in the Home Page Text Filter search box to find the dashboards with HDK in the name. Select 2a_TicketAnalysis_HDKA.

4. The selected dashboard displays in the **Preview** pane and shows a sample of the selected dashboard.

5. Click **Set** to save the selections for the user HDK_Admin.

For this example, the **Set Home Page** results displays as shown in the following image.



6. Log in as **HDK_Admin** to confirm that the user can access the selected dashboard.

Respond to Processing Errors

The **Set Home Page Results** message provides error information when an Administrator attempts to assign a dashboard to users who do not have security access to the dashboard. Home Page Manager processes the changes that are valid and notes the ones that could not be processed in the **Set Home Page Results**. Home Page Manager provides additional details for any other assignment errors in the Error log for review and resolution.

> **Note:** When selecting a preview in Home Page Manager and using Internet Explorer, solutions that contain multiple embedded dashboards may not display. This issue only occurs in the OneStream browser version. The OneStream Windows Application version displays all preview pages as normal.

Clean Unneeded Log Entries

To launch Log Cleaner, click the **Log Cleaner** icon on the Administrator Solution Tools home page.

The Log Cleaner provides a simple process that lets you delete user log entries, error log entries or task activity log entries. The Access Log Cleaner setting in the Global Options determines which users can access the Log Cleaner and clear logs. If the Log Cleaner is visible in the Administrator Solution Tools Home page, you are a member of the group that can access Log Cleaner and delete log activity.

See also: The security roles section in Settings for more information on the Access Log Cleaner setting.

Deleting logs is a simple process with the following steps:

- Select the type of logs you want to clear.
- Select the application and user for which you want to delete log records.
- Select the number of days from today you want log records to be retained.
- Select Execute to clear selected logs.

Select Log Types to Clear

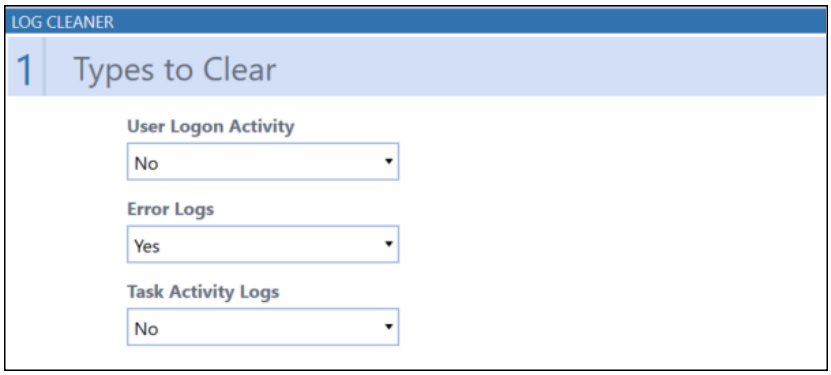
The first step to clear log files is to select the types of logs to be cleared. Use the fields in the Types to Clear section of Log Cleaner to do this. Select values from the following:

> **Note:** All fields in this section are set to **No** by default.

User Logon Activity
Set to **Yes** to clear records of all users when they log on and off OneStream applications. These records show who is logged on and when they log off for all applications.

Error Logs
Set to **Yes** to clear any logs from error processes, including errors written from business rules.

Task Activity Logs
Set to **Yes** to clear logs for all running and completed tasks.



When you change any of the default settings in the **Types to Clear** section, the **Execute Clear Logs Data Management Sequence** section of the Log Cleaner appears. Click **Execute** to clear logs based on the selected criteria.

Select Application and/or User

The second step in the log clearing process is to select specific users and applications whose log entries you want cleared.

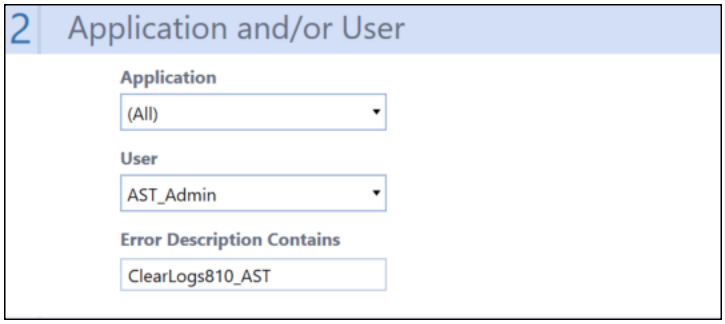
Log Cleaner allows administrators to select custom filtering to clear the Error Log based on specific text.

Use the fields to clear logs based on application, user, and text in the log.

Application
Clear logs for a specific application or all applications.

User
Clear logs for an individual user or all users in the environment.

Error Description Contains (optional)
Enter a text string from a log error to clear logs that use the string. The string must match exactly.



Select Days to Retain

The third step in the log cleaning process is to determine how many days of error logs should be retained after the current log clearing executes.

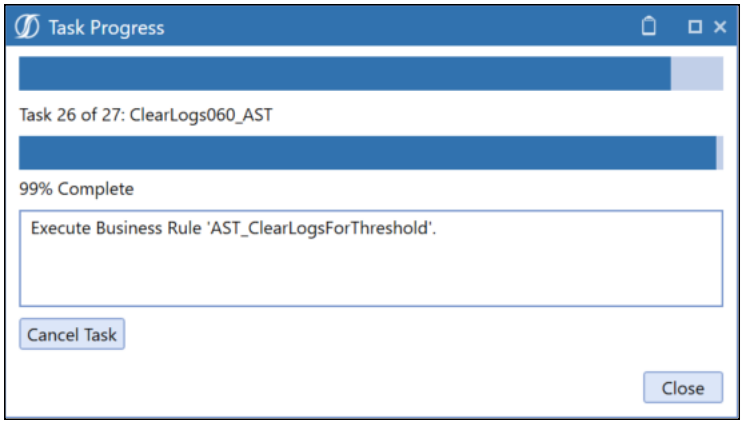
Days to Retain
Use this field to set the number of days error logs are retained after the current log clearing executes.

Select a value between 30 and 810 days. For example, if set to 90, all qualified error records older than 90 days are cleared.

Execute Clear Logs Data Management

Select log clearing criteria and the number of days to retain log records, and then click **Execute** to clear logs.

The Log Cleaner shows the progress, displaying the log cleaning tasks as they execute. If needed, click **Cancel Task** to stop the log cleaning process. Click **Close** when cleaning completes.



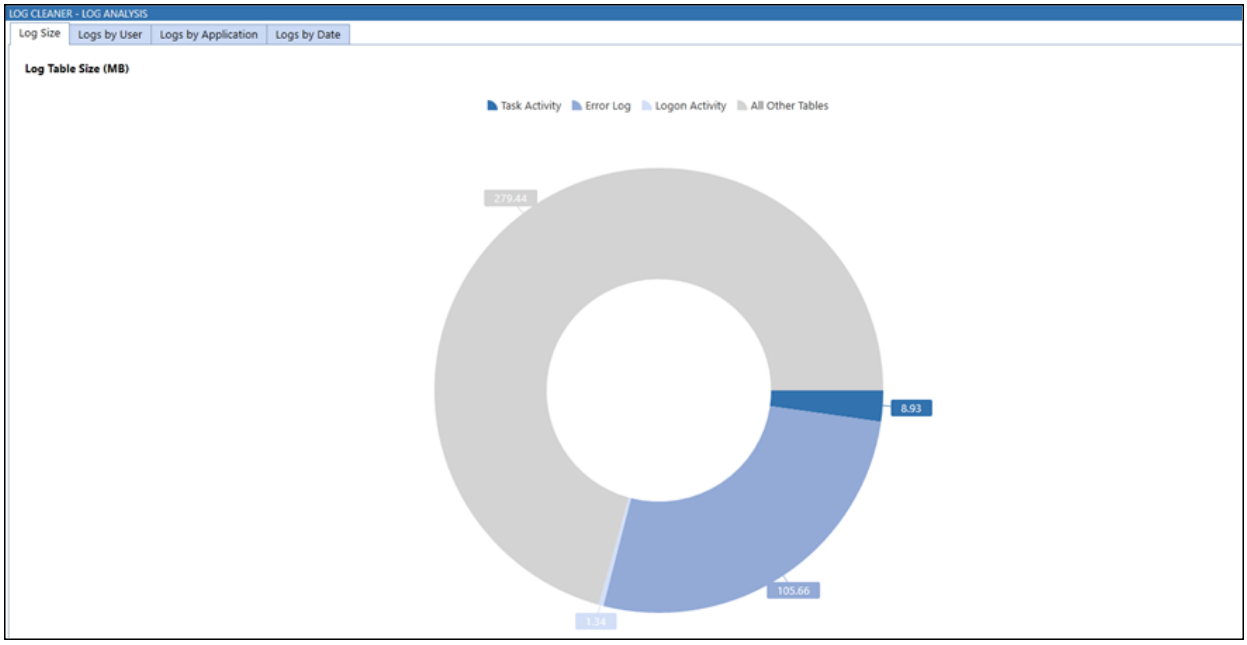
Log Analysis Page

The Log Analysis page provides a graphical user interface to review OneStream logs. The page includes the following tabs that provide details on OneStream logs

Log Size
This tab shows the size of each log table by type (in megabytes) in a pie chart. Log types that display are:

- Task Activity
- Error Log
- Logon Activity
- Logs from all other tables

Use the information to help determine which logs you want to clear. In the following graphic, the All Other Tables log table contains the bulk of retained log entries, representing a potential place to focus a log clearing process.



Logs by User
This tab contains a bar chart showing the users with the most retained log activity. Bars on the chart are color-coded, so you can see details on the exact number of task activity, error log, and logon records for each user. Use this chart to quickly see which users you may want to focus on for your log clearing process.

Logs by Application
This tab contains a bar chart showing log entries by log type for each application. Bars on the chart are color-coded, so you can see details on the exact number of task activity, error log, and logon records for each application. Use this chart to see the applications you may want to focus on for your log clearing process.

Logs by Date
This tab contains a bar chart showing the number of log entries by log type based on the amount of time the records have been retained. Bars on the chart are color-coded, so you can see details on the exact number of task activity, error log, and logon records for each.

Use the dropdown to select a monthly, quarterly, semi-annual, or whole year retention period. Use this chart to see retention periods with the most log entries of each type.

Help & Miscellaneous Information

This page contains solution documentation.

Display Settings

OneStream and MarketPlace solutions frequently require the display of multiple data elements for proper data entry and analysis. Therefore, the recommended screen resolution is a minimum of 1920 x 1080 for optimal rendering of forms and reports.

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any custom scaling options.

Package Contents & Naming Conventions

The package file name contains multiple identifiers that correspond with the platform. Renaming any of the elements contained in a package is discouraged in order to preserve the integrity of the naming conventions.

Example Package Name: AST_PV6.2.0_SV101_PackageContents.zip

Identifier	Description
AST	Solution ID
PV6.2.0	Minimum Platform version required to run solution
SV101	Solution version
PackageContents	File name

Solution Database Migration Advice

A development OneStream application is the safest method for building out a solution with custom tables such as this one. The relationship between OneStream objects such as workflow profiles and custom solution tables is that they point to the underlying identifier numbers and not the object names as seen in the user interface. Prior to the solution configuration and to ensure the identifiers match within the development and production applications, the development application should be a recent copy of the production application. Once the development application is created, install the solution and begin design. The following process below will help migrate the solution tables properly.

See also: *Managing a OneStream Environment* in the *Design and Reference Guide*.

1. In the production OneStream application, install the solution and create the data tables. See Configure the OneStream Application Server for Database Server Connection settings and installation details.

2. Data tables are created in the OneStream Development application during the solution installation. Using the Microsoft Data Migration Assistant, copy the data from the tables to the Production Microsoft SQL Server Database. Only the Microsoft SQL Administrator should run the migration assistant.

   Important: This process has the potential to overwrite existing table data in the production application database if data already exists.

MarketPlace Solution Modification Considerations

A few cautions and considerations regarding modification of MarketPlace solutions:

- Major changes to business rules or custom tables within a MarketPlace solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any dashboard object or business rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the MarketPlace solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.
- If modifications are made to a MarketPlace solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a dashboard do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.