Cloud Administration Tools Setup Instructions

PV 520 SV 101

Contents

Overview 4
User Management Console 4
Manage Applications 4
Setup & Installation 5
Dependencies 5
Install Cloud Administration Tools 5
Set Up Cloud Administration Tools 6
Create Tables 6
Package Contents 6
Settings 7
Global Options 7
Email Connection 7
Domain 8
OneStream XF URL 8
Authentication Provider 8
Directory ID 8
Client ID 8
Client Secret 8
Endpoint Code 8
Functionality Enabled 9
Uninstall 9
Home 10
User Management Console 11
User Detail 11
Create User 12
Create User 12
Invite User 13
Send Invitation 13
Reset Password 14

Reset User Password 14
Delete User 15
Delete User 15
Import Users 15
Create Users Import Format 15
Invite Users Import Format 16
Import a Create / Invite User File 16
Refresh 16
Security 16
Manage Applications 17
1 | Source 17
2 | Target 17
3 | Properties 18
Application Name 18
Application Type 18
4 | Create or Replace Application 19
Create Application 19
Replace Application 19
Reset IIS 19
Confirm Summary Page 20
History Details 21
Result 21
Action Taken 21
Application Type 21
New Application Name 21
Application Replaced 21
Source Application 21
Start Time 22
End Time 22
User 22
Error Message 22
Manual IIS Reset 22

Help & Miscellaneous Information 23

Cloud Database Advice 23

Cloud Database Space 23

Cloud Database Application Limits 23

Azure Environments 23

Display Settings 24

MarketPlace Solution Modification Considerations 24

Overview

Cloud Administration Tools is a solution containing access to multiple cloud service functionalities, each enabling OneStream XF Cloud Administrators to perform their role with greater efficiency.

User Management Console

The User Management Console manages the relationship between users hosted in the Microsoft Azure Active Directory (Azure AD) and OneStream Framework. With this console, a system administrator can self-manage their Azure AD users within OneStream XF by inviting, creating, deleting (disabling) and importing users as well as resetting passwords.

Note: User Management Console is only available with Azure AD hosted by OneStream Cloud Services and to members of the Administrator's Security Group.

Manage Applications

The Manage Applications manages OneStream XF applications in a cloud environment. System Administrators can copy existing applications to create new applications or replace existing applications within OneStream XF. With Manage Applications, Administrators can make changes for testing or archival purposes.

This functionality is only available to members of the administrator's security group.

Setup & Installation

This section contains important details related to the installation of Cloud Administration Tools. Before you install Cloud Administration Tools, familiarize yourself with these details.

> **Important!** If your environment matches the following criteria, all installation, setup, and configuration of Cloud Administration Tools is performed by the OneStream Cloud Support Team. Contact OneStream Support for assistance.
>
> - Platform version 5.1 or below
> - Utilizing User Management Console
>
> All others can install Cloud Administration Tools without Cloud Assistance.

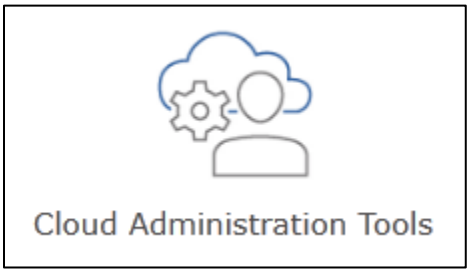
See also: MarketPlace Solution Modification Considerations

Dependencies

Component	Description
OneStream XF 5.2.0 or later	Minimum OneStream Platform version required to install this version of Cloud Administration Tools.

Install Cloud Administration Tools

1. On the OneStream XF MarketPlace Dashboard, click **MarketPlace** > **Cloud Administration Tools**.

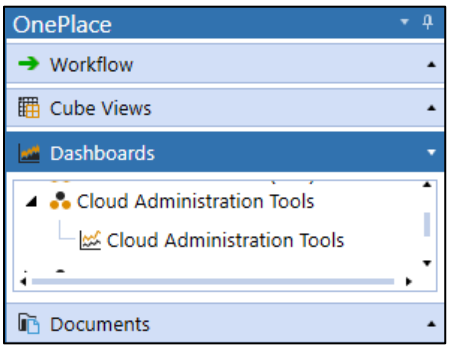


2. On the Cloud Administration Tools Solution page, select the appropriate OneStream XF platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and then click **Download**.
4. Log in to OneStream XF.
5. On the **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 Cloud Administration Tools

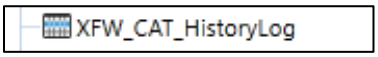
The first time Cloud Administration Tools is run, you are guided through the table setup process.

- In OneStream XF, click **OnePlace** > **Dashboards > Cloud Administration Tools** > **Cloud Administration Tools**.



Create Tables

1. Click **Step 1: Create Tables**
   This step may be necessary when upgrading even if tables are already present. Cloud Administration 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 Cloud Administration Tools.

Package Contents

The Dashboard Maintenance Unit provides the user interface for Cloud Administration Tools and includes the required Dashboard Groups, Components, Data Adapters, Parameters and files.

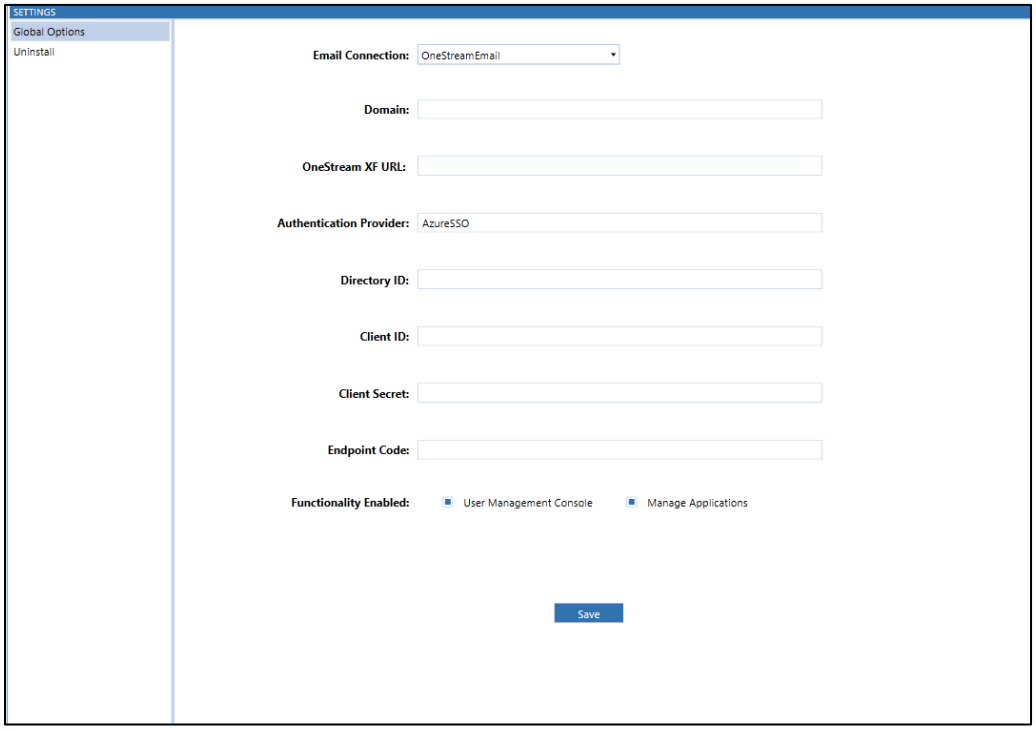
SETTINGS

The **Settings** page contains the Global Options tab in which key properties that guide administration are set as well as Uninstall options.

Global Options

The **Global Options** page contains key properties which guide global Cloud Administration Tools administration. The setup for this page will be set up by the OneStream Cloud Support Team.

Note: Once configured and saved, some Global Options will not be visible. Only Cloud Support should configure these settings.



Important: Do not modify these settings once they are configured by Cloud Support.

Email Connection

Select an email connection from the dropdown list. The Email Connections are configured in the OneStream XF Application Server configuration and contain all the necessary setup information for the local email provider including the sending email address, server credentials, host, port, etc. The email

connections list is pulled from the Database Server Connections list in the Application Server configuration.

For more details on email database connections, see the *OneStream XF Installation and Configuration Guide.* This setting may be changed by the administrator if you want emails to come from a different email connection.

Domain

The Azure Active Directory domain name is `@mydomain.onestreamcloud.com` and should not be modified unless directed to do so by support.

OneStream XF URL

The Azure URL of the customer's environment is `https://xxxxxx.onestreamcloud.com/onestreamweb/onestreamxf.aspx` and should not be modified unless directed to do so by support.

Authentication Provider

The name of the Authentication Provider service for the OneStream XF Framework database in this server environment. Do not modify this setting unless directed to do so by support.

Directory ID

The Directory ID configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Client ID

The Client ID configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Client Secret

The Client Secret configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Endpoint Code

The Endpoint Code configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

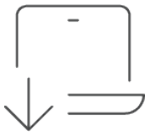
Functionality Enabled

The Functionality Enabled setting allows the user to toggle the availability of which functionality is displayed on the Cloud Administration Tools home page. Do not modify this setting unless directed to do so by support.

Uninstall

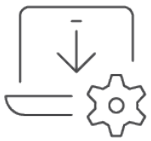
The Uninstall feature allows either the Cloud Administration Tools User Interface or the entire solution to be uninstalled. There are two Uninstall options:

> **Note**: If performed as part of an upgrade, any modifications applied to standard Cloud Administration Tools objects are removed.



Uninstall UI removes Cloud Administration 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 Cloud Administration Tools since some of the Dashboards or other objects may have been modified.

- Choose this option if you want to accept a Cloud Administration Tools update without removing the data tables.
- The Cloud Administration Tools Release Notes will indicate if an overinstall is supported.



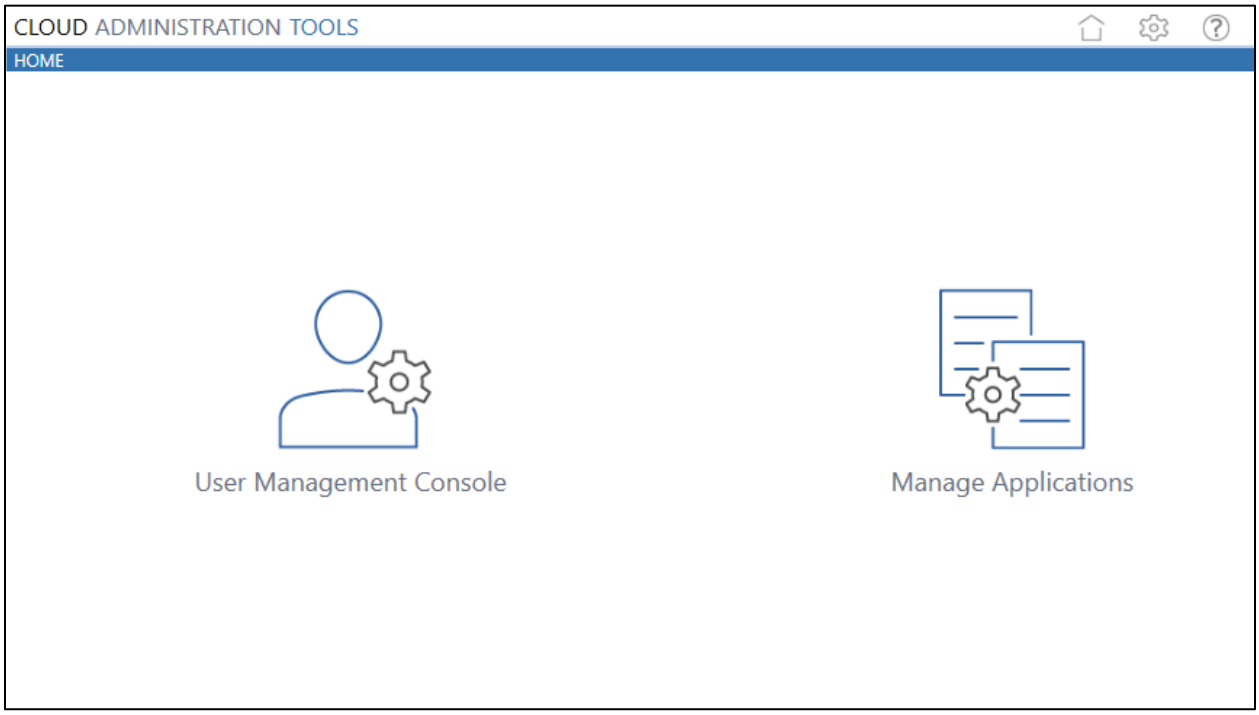
Uninstall Full removes all the related data tables, all data, Cloud Administration Tools Dashboards, and Business Rules.

- Choose this option to completely remove Cloud Administration Tools or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

HOME

The **Home** page displays the functionality enabled through **Global Settings**.

- The **User Management Console** enables System Administrators to perform all user account maintenance tasks in a single interface.
- **Manage Applications** is the primary user interface for System Administrators to create or replace applications within OneStream Azure environment.

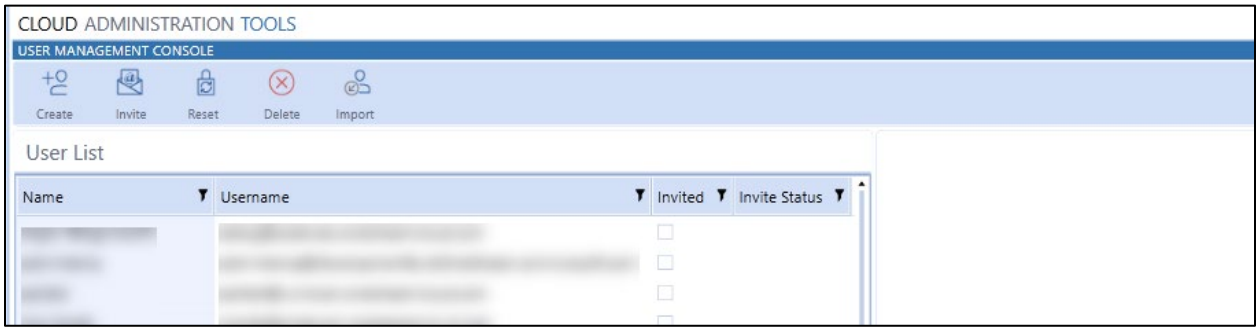


User Management Console

The **User Management Console** displays a grid containing all Azure AD users and their related actions.

Administrators running platform version 4.x can use the User Management Console to create, invite, reset, delete, or import users. When you launch the User Management Console, the User List is displayed in a grid view which displays the following information about each user:

- **Name**: User's first and last name
- **Username**: Login name
- **Invited**: Indicates if the user was invited from an external Azure AD tenant.
- **Invite Status**: Indicates if the user responded to the invitation.



User Detail

The following user details are displayed if the AD member is a OneStream XF user:

User Info

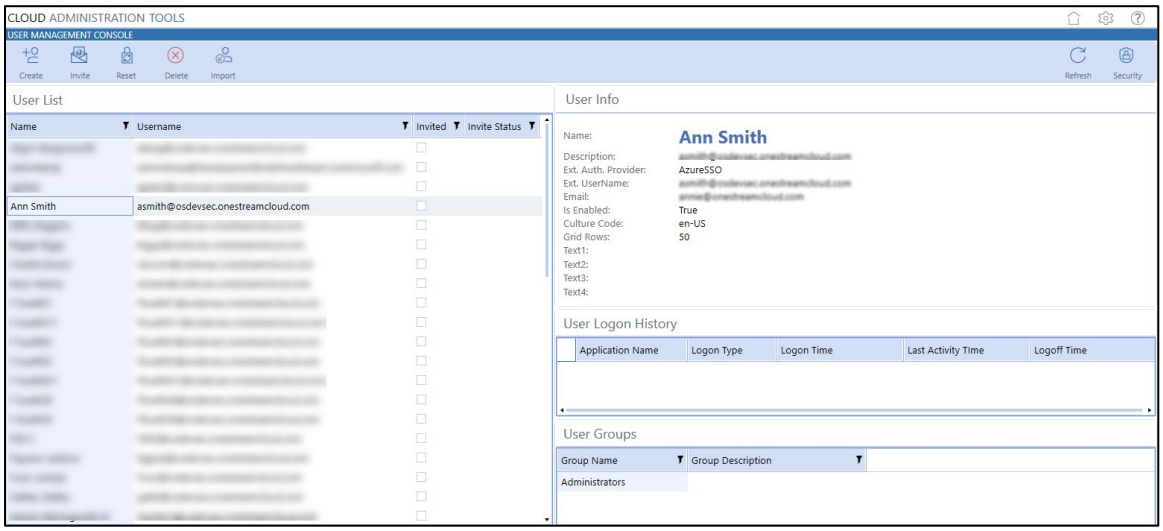
- Name
- Description
- Ext Auth Provider
- Ext UserName
- Email
- Is Enabled
- Culture Code
- Grid Rows

User Logon History

- Application Name
- Logon Type
- Logon Time
- Last Activity Time
- Logoff Time

User Groups

- Group Name
- Group Description



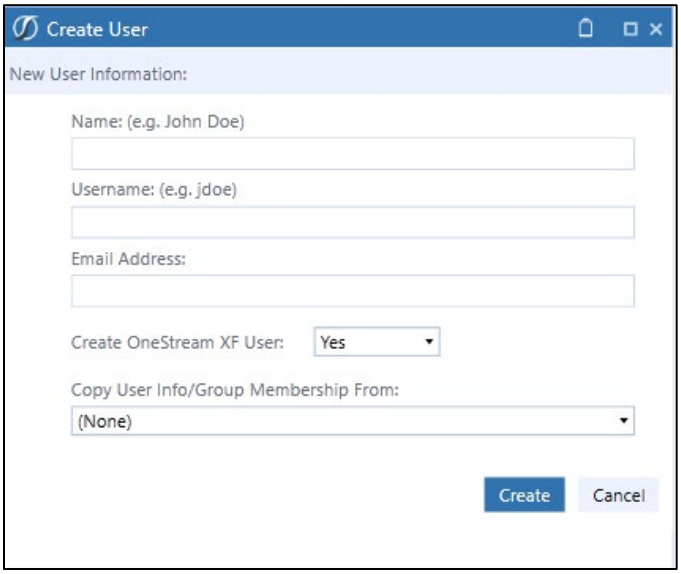
Create User

Create User adds new users to the Azure AD tenant and optionally to the OneStream XF Framework.

Create User

1. On the **User Management Console** page, click **Create** and enter the following information:
   - **Name:** Enter the user's name.
   - **Username**: Enter additional information you want to display to further identify the user.
   - **Email Address:** Enter a valid email address.
   - **Create OneStream XF User:** Select **Yes** to add the user to the OneStream FX Framework database.
   - **Copy User Info/Group Membership From:** Select to copy an individual's information or group information.

2. Click **Create** to complete.
3. Repeat the procedure for each user you want to add.
4. Click **Close** to exit the Create User dialog.



Note: Copied security groups may allow access to multiple applications in the OneStream XF Framework environment, requiring additional security group adjustments on the Security tab of the OneStream XF System > Administration.

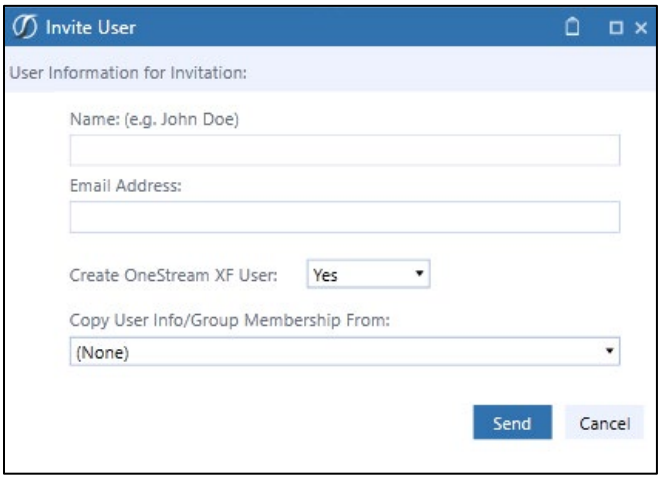
Invite User

Invite User allows a System Administrator to send an invitation to a user who has an existing Azure AD or Office 365 account not currently in the Azure AD tenant hosted by OneStream Cloud Services. After accepting the invitation the user can use that existing account to access the OneStream XF. This email will also contain the company's OneStream XF environment URL.

Send Invitation

1. On the **User Management Console** page, click **Invite** and enter the following information:
   - **Name:** Enter the user's name.
   - **Email Address:** Enter a valid email address.
   - **Create OneStream XF User:** Select **Yes** to add the user to the OneStream XF Framework database.
   - **Copy User Info/Group Membership From:** Select to copy an individual's information or group information from the security user information.

2. Click **Send** to send the invitation or **Close** to cancel.



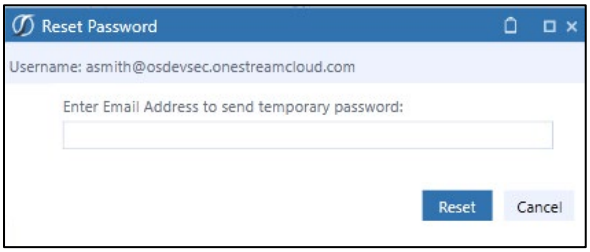
Reset Password

Reset Password lets a System Administrator initiate the password reset process for a user.

The Reset Password function generates a new temporary password and sends it to the user via email. The user will be required to specify a new password the next time they log into OneStream XF using this temporary password.

Reset User Password

1. On the **User Management Console** page, click **Reset Password**.
2. Enter the user's email address.
3. Click **Reset** to send the temporary password or **Close** to cancel.



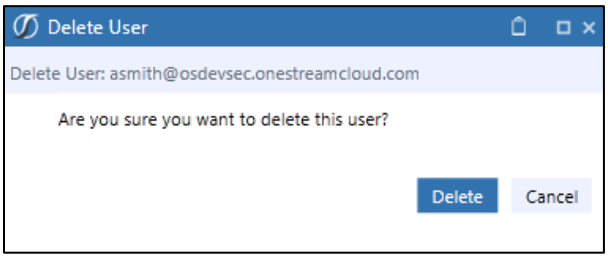
Delete User

Delete allows a System Administrator to remove a user from the Azure AD and disable the user in the OneStream XF Framework security.

When a user is deleted from the system, their user information remains in OneStream XF to preserve the integrity of the audit trail which contains the activity history associated with that User ID.

Delete User

1. In the User List on the **User Management Console** page, select the User you want to delete.
2. Click **Delete**.
3. In the **Delete User** dialog box, click **Delete** to confirm or **Close** to cancel the process.



Import Users

Import Users allows a System Administrator to perform a bulk Create or Invite by importing a valid comma-separated values (CSV) file of user properties.

The bulk import process creates users but does not assign a default security group in the OneStream XF System. Additional security group maintenance in the OneStream XF System Administration Security tab will be necessary to finalize the new user's access.

Create Users Import Format

The format for **Create Users** is a three column, comma separated file with the fields: Display Name, Username, and Email Address.

Example Create User

```
Displayname,Username,Email
John Doe,jdoe,jdoe@mycompany.com
```

Invite Users Import Format

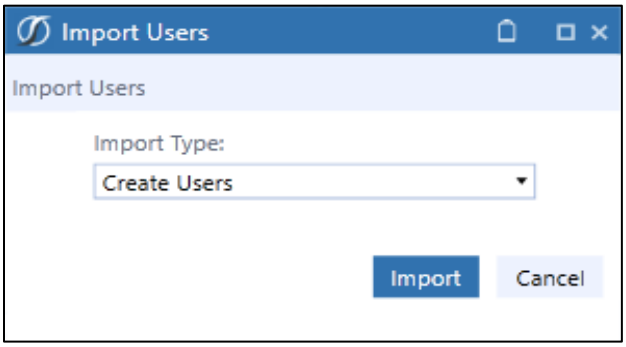
The format for **Invite Users** is a two column, comma separated file with the fields: Username and Email Address.

Example Invite User

```
Username,Email
mdoe,mdoe@mycompany.com
```

Import a Create / Invite User File

1. On the **User Management Console** page, click **Import**.
2. Select the type of file you want to import from the Import Type dropdown list (Create Users or Invite Users) and click **Import**.
3. Navigate to the location of the file and click **Open**.
   The Import Users process executes a data management job for the imported users. This job will run as a background task that can be monitored from the Task Activity screen.



Refresh

The **Refresh** performs a page update.

Refresh User Details updates the displayed information for changes in the security domain or the OneStream XF system security.

Security

Security accesses the OneStream XF framework.

Security opens the OneStream XF System/Administration/Security page to manage the system security framework for OneStream XF users and groups.

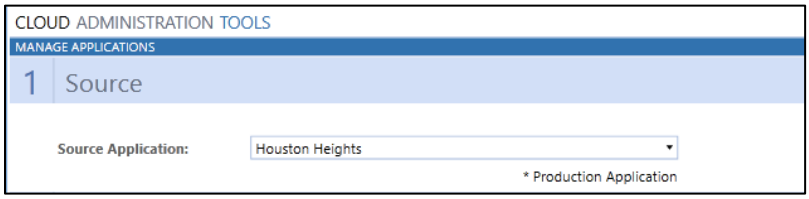
Manage Applications

Manage Applications allows the user to create or replace applications as a copy of existing applications within their OneStream Azure environment.

When entering the Manage Applications functionality, the first step (Source Application) is visible. As each step is completed, further steps will appear, walking the user through managing the application.

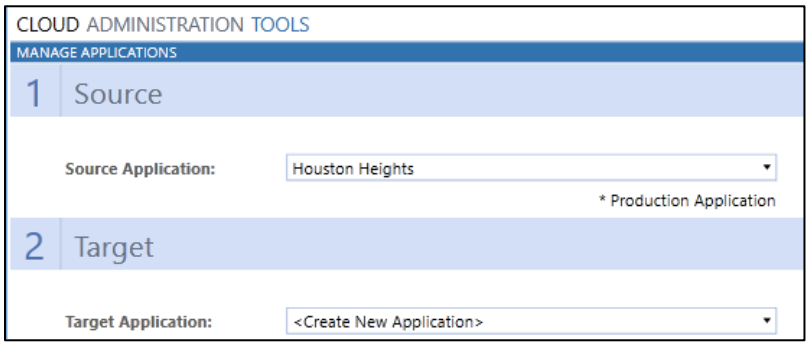
1 | Source

Source Application is the data that will be copied to create a new application or replace an existing application. The Source Application will display all active OneStream XF applications. If the selected source is a production application, an asterisk will appear identifying it as such.



2 | Target

Target Application will create a new or replace an existing application. The dropdown list displays all OneStream XF applications that can be selected for this action.



Important: Replacing the application removes all old data and replaces it with a copy of the application selected in Step 1 (Source Application).

3 | Properties

Properties allow you to configure options on the application you are about to create.

Application Name

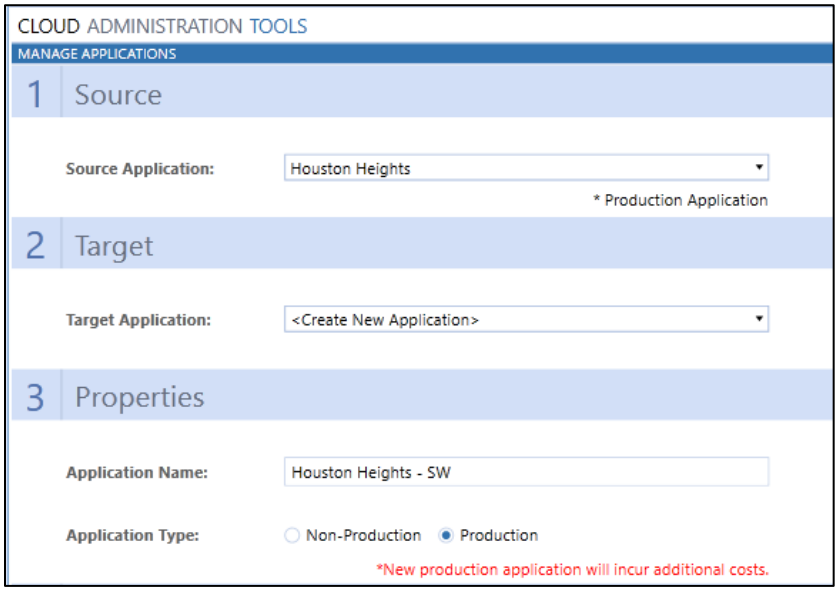
If <Create New Application> is selected in the Target field, the application name will be blank allowing the user to choose a unique application name.

If an application is chosen from the Target Application dropdown list to be replaced, the Application Name in Step 3 will automatically default to the application name field. This application name can remain the same or the user may choose to rename the Target Application.

> **Note**: Only the following characters are allowed when naming applications: Period, space, underscore, alphanumeric, and hyphen.

Application Type

Application Type indicates if the application will be non-production or production. This field will automatically default to the application type of the selected target and can be changed. It will always default to non-production if <Create New Application> is chosen. If Production is chosen when creating a new application or when changing a non-production application to a production application, a warning message will appear indicating additional costs will be incurred.



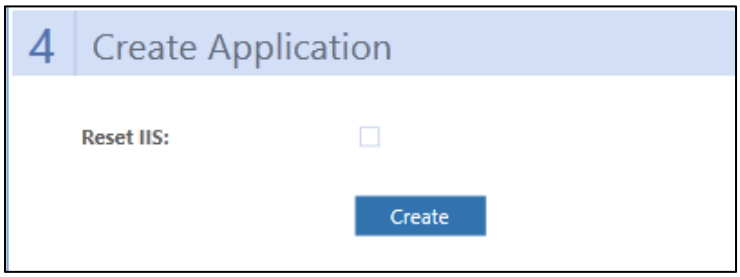
> **Important:** Long-term retention policies are applied to newly created production applications and will incur additional costs.

4 | Create or Replace Application

Step 4 displays as either Create Application or Replace Application, depending on the action taken in Step 2.

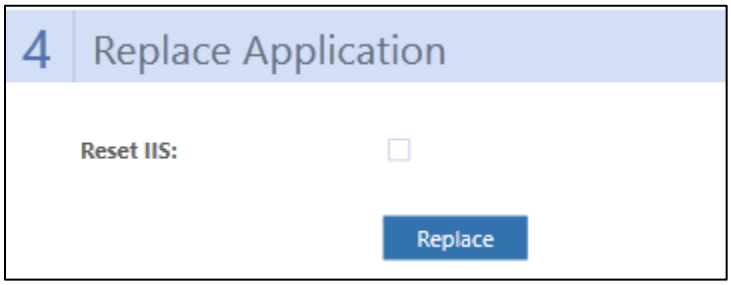
Create Application

If a new application is being created, Create Application will be displayed.



Replace Application

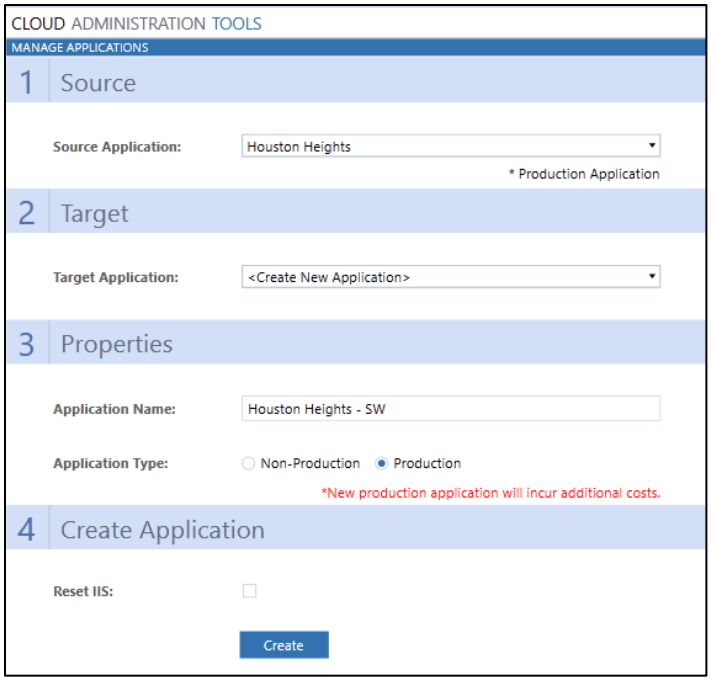
If an existing application was chosen in the Target Application dropdown, Replace Application will be displayed.



Reset IIS

The Reset IIS checkbox determines when to recycle the application pool. Reset IIS must be executed for the newly created or replaced application to appear in the application dropdown list when logging in to OneStream XF.

Reset IIS needs to be determined at the time of managing the application and defaults as unchecked. If unchecked, the Reset IIS process must be manually executed by an administrator before the newly created or replaced application is accessible. Manually resetting IIS can be executed on the History Detail page. When Reset IIS is selected, the reset process will automatically begin when the process of creating or replacing an application is successfully completed.

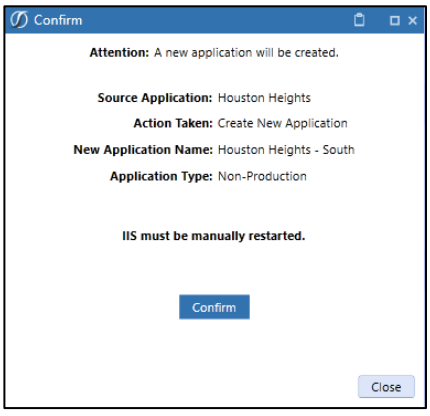


> **Important:** Performing an IIS Reset ends all tasks currently in progress.

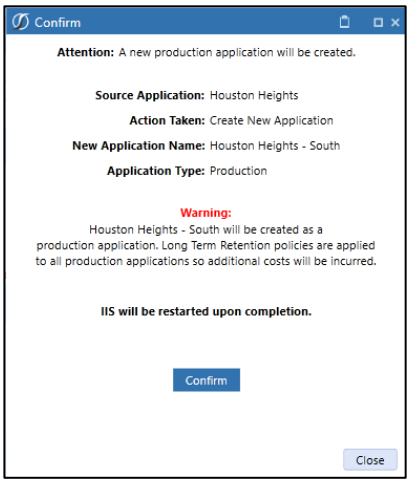
Confirm Summary Page

The summary dialog box appears once the create / replace action button is executed. The summary dialog displays the actions which will take place for confirmation by the user. This summary also displays any warnings such as if a production application is being created. Once the confirmation summary is reviewed, the user can confirm the actions, close the dialog box to make corrections or cancel the process. Once the user confirms the actions being taken, the History Details Page will appear.

No Warnings



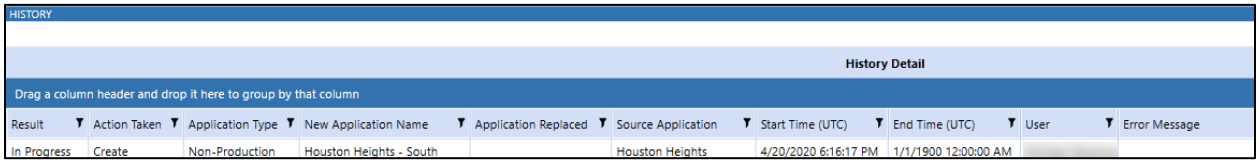
With Warnings



History Details

The **History Details** page displays a comprehensive report of actions performed using Manage Applications.

History Detail includes detailed information of the operations executed through Manage Applications. This page is a filtered table of data that can be pivoted by dragging a column header into the blue bar above to review specific data.



Result

The Result field shows the progression and results of all applications being created or replaced once the process starts. The application states are: In Progress, Success, or Failed. If the status shows as Failed, there will be an error message in the Error Message column.

Note: If the result is showing in Progress, in order to see if the process has completed its action, the page must be refreshed by using the refresh button in the top right corner next to the date filter dropdown combo box.

Action Taken

Action Taken is the action executed by the user. It will display Create or Replace for all applications.

Application Type

This field displays what type of application was created and will show if the application is Production or Non-Production.

New Application Name

Displays the new name given to the created or replaced application.

Application Replaced

If an application was replaced, this field displays the name of the old application. If a new application is created, this field will remain blank.

Source Application

The Source Application is the data which was used to create a new application or has replaced the data in another application.

Start Time
Indicates the start time of the copy process.

End Time
Indicates when the copy process ended.

User
Indicates the user which created or replaced the application.

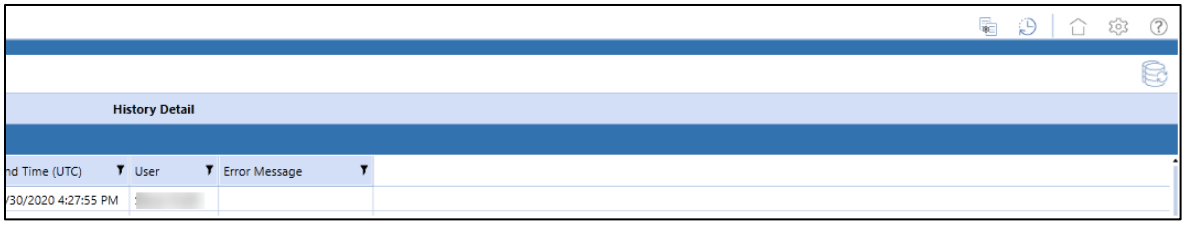
Error Message
If the copy process has failed, the Result field will show as failed and a message will appear in the Error Message field. This error message explains what the error was and what actions to take next.

Manual IIS Reset

Reset IIS allows users to manually reset applications.

If choosing to manually reset IIS to recycle application pools, navigate to the History Detail page and choose Reset IIS in the upper right corner of the page. When choosing this option, a warning will display for the user to confirm and continue the IIS reset process or close the warning and return to the History Detail page. Confirming this action will immediately reset all application pools.

When a copy is in process the Manual Reset icon will not be present.



Help & Miscellaneous Information

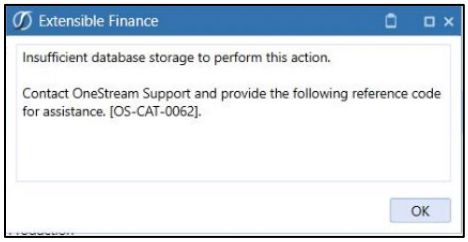
This page contains solution documentation.

Cloud Database Advice

The following are some best practices and other assorted details pertaining to the Cloud Administration Tools.

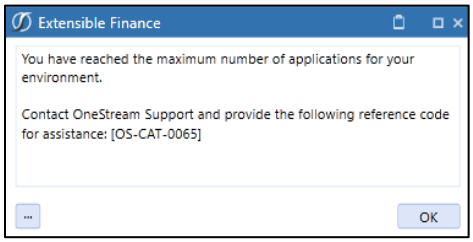
Cloud Database Space

When managing applications, if remaining Azure capacity has insufficient space to copy an entire application, the copy process will stop, and an error message will display. OneStream Support may be able to increase your available storage at an additional cost.



Cloud Database Application Limits

If Application limits have been reached, users will not be able to enter the Manage Applications functionality and a message will appear directing the user to contact OneStream Support. Support cannot increase the maximum number of databases allowed however they may be able to assist in cleaning up unneeded databases to allow new ones to be created.



Azure Environments

Using Manage Application cannot create or replace applications between Azure environments. An environment is a set of resources dedicated to the hosting of one instance of OneStream XF. Each unique URL used to access OneStream represents an environment.

Display Settings

OneStream XF and XF 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.

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.

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