Parcel Service Guide

PV600 SV102

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Table of Contents

Overview 1

Setup and Installation 2

Dependencies 2

Select the Parcel Service Development Location 2

Create the OneStream Development Application 3

Application Server Settings 3

Configure the OneStream Application Server 3

Install Parcel Service 4

Set Up Parcel Service 5

Create Tables 5

Package Contents 6

Data Management 7

Settings 8

Global Options 8

Security Role [Manage Parcel Service] 9

Security Role [Manage Packages Group] 9

Security Role [Manage Distributions Group] 9

Email Connection 9

Default Email Title 9

Default Email Message 9
Concurrent Email Threads 10
Parameter Discovery Nesting 10
Create Fileshare Folder Path 10
Test Mode (True/False) 10
Uninstall 11
Parcel Service Home Page 12
Step 1: Select Parcel Type 12
Step 2: Select a Package 12
Step 3: Review Package Contents 13
Step 4: Ship Package 13
Packages 14
Package Definition 14
Package Contents 15
Supplied Parameters – Package Level 16
Supplied Parameters – Content Level 17
Discover 17
Package Groups 19
Package Group Definition 19
Packages – Package Group Level 19

Supplied Parameters – Package Group Level 20
Distribution Lists 20
Distribution List - Users 21
Distribution List - Groups 22
Distribution List - Members 22
Help and Miscellaneous Information 23
Display Settings 23
Package Contents and Naming Conventions 23
GetAllLiteralParams 24
Solution Database Migration Advice 24
MarketPlace Solution Modification Considerations 25
Appendix 1 26
Encrypting Connection Information 26

Overview

The Parcel Service is a MarketPlace solution and part of the Extensible Document Framework. This solution provides book and document distribution capabilities by allowing you to create document packages or package groups that can be shipped (emailed or copied to a fileshare) based on predefined distribution settings. These packages and package groups can be shipped either from the solution home page, or on a scheduled basis using PowerShell script automation.

Setup and Installation

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

See also: MarketPlace Solution Modification Considerations

Dependencies

Component	Description
OneStream 6.0.0 or later	Minimum OneStream Platform version required to install this version of Parcel Service.
OneStream App for Windows	Parcel Service is optimized for the OneStream Application for Windows which has all the functionality as the browser-based version of OneStream.
Microsoft SQL Server 2012 or later	Parcel Service requires an instance of Microsoft SQL Server 2012 or later.

Select the Parcel Service Development Location

Before beginning installation, decide whether to build the solution 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 the solution 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 the solution 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 the solution.

Create the OneStream Development Application

1. Ensure that all the OneStream artifacts relating to Parcel Service, such as **Workflow Profiles** and **Entities**, are in the Production application.
2. Copy your Production OneStream application to your Development environment and rename it. Use this Development version for your Parcel Service 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. If other MarketPlace solutions (such as Specialty Planning) are already in the application, these adjustments may already exist.

See also: Solution Database Migration Advice

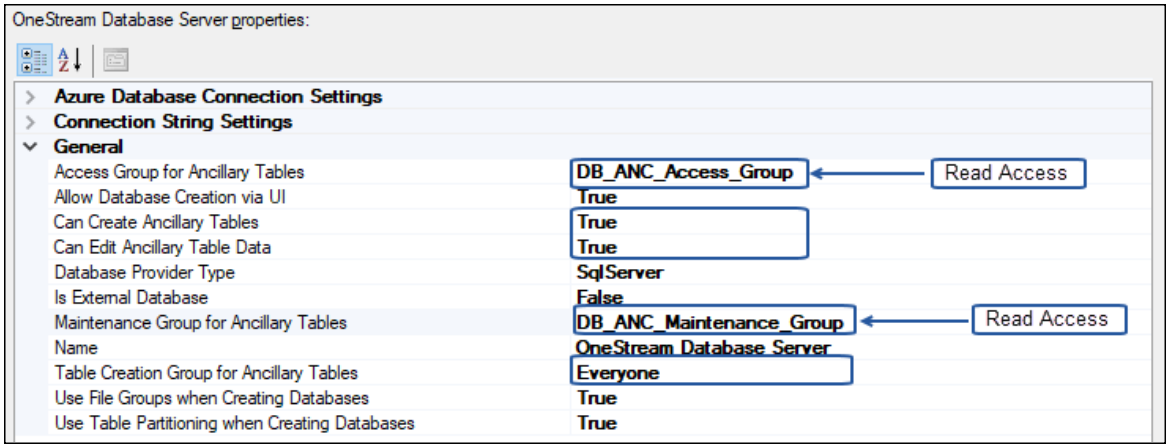
Configure the OneStream Application Server

Be sure that the security group settings include the users who will be working on and setting up the solution 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**:

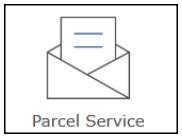
- **Access Group for Ancillary Tables**: Select a group that includes those who will access records.
- **Can Create Ancillary Tables**: True
- **Can Edit Ancillary Table Data**: True
- **Maintenance Group for Ancillary Tables**: Select a group who will edit and maintain tables.
- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.



4. Restart Internet Information Server.

Install Parcel Service

1. On the OneStream MarketPlace Dashboard, click **MarketPlace** > **Parcel Service**.



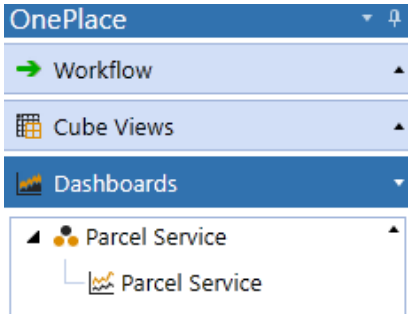
2. On the Parcel Service solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.

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 Parcel Service

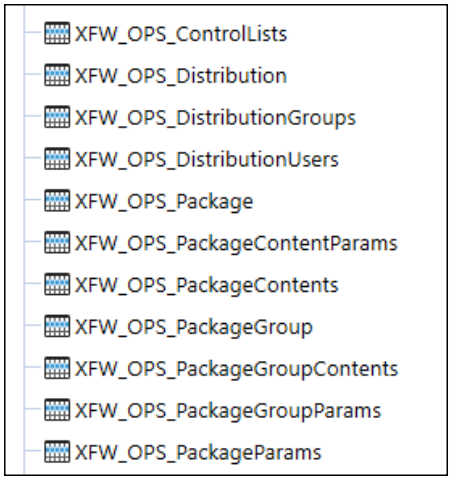
The first time you run Parcel Service, a guided table setup process begins.

In OneStream, click **OnePlace** > **Dashboards** > **Parcel Service** > **Parcel Service**.



Create Tables

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

Package Contents

The Dashboard Maintenance unit provides the user interface for Parcel Service and includes the required dashboard groups, components, data adapters, parameters and files.

The following business rules are included:

OPS_HelperQueries
This is a dashboard dataset business rule that provides functions for data query operations from dashboard components and data adapter components.

OPS_SolutionHelper
This is a dashboard extender business rule that provides various helper functions for the Parcel Service solution. These helper functions include management of the solution setup, configuration settings, and management.

OPS_ParamHelper
This is a conditional parameter helper functions 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.

OPS_ShipPackageUsingID
This is an extensibility business rule used to execute the Parcel Service package shipping routine as a background data management job where the package is referenced by ID.

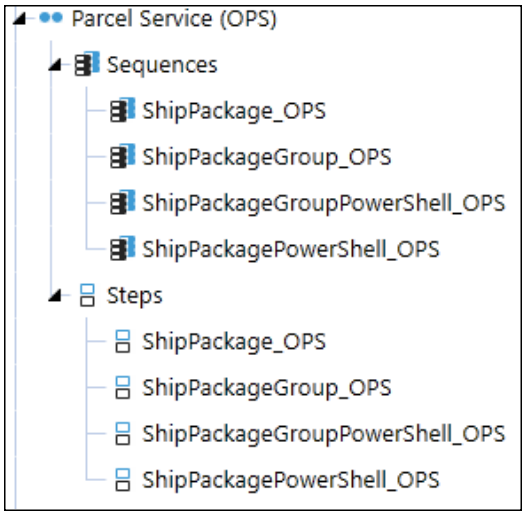
OPS_ShipPackageGroupUsingID
This is an extensibility business rule used to execute the Parcel Service group package shipping routine as a background data management job where the group package is referenced by ID.

OPS_ShipPackageUsingName
This is an extensibility business rule used to execute the Parcel Service package shipping routine as a background data management job where the package is referenced by name.

OPS_ShipPackageGroupUsingName
This is an extensibility business rule used to execute the Parcel Service group package shipping routine as a background data management job where the package is referenced by name.

Data Management

The data management sequences and steps shown in the following graphic are created to be used with their related business rules (as described above). The benefit of running these processes through a data management sequence is that they can run in the background while you continue your work.



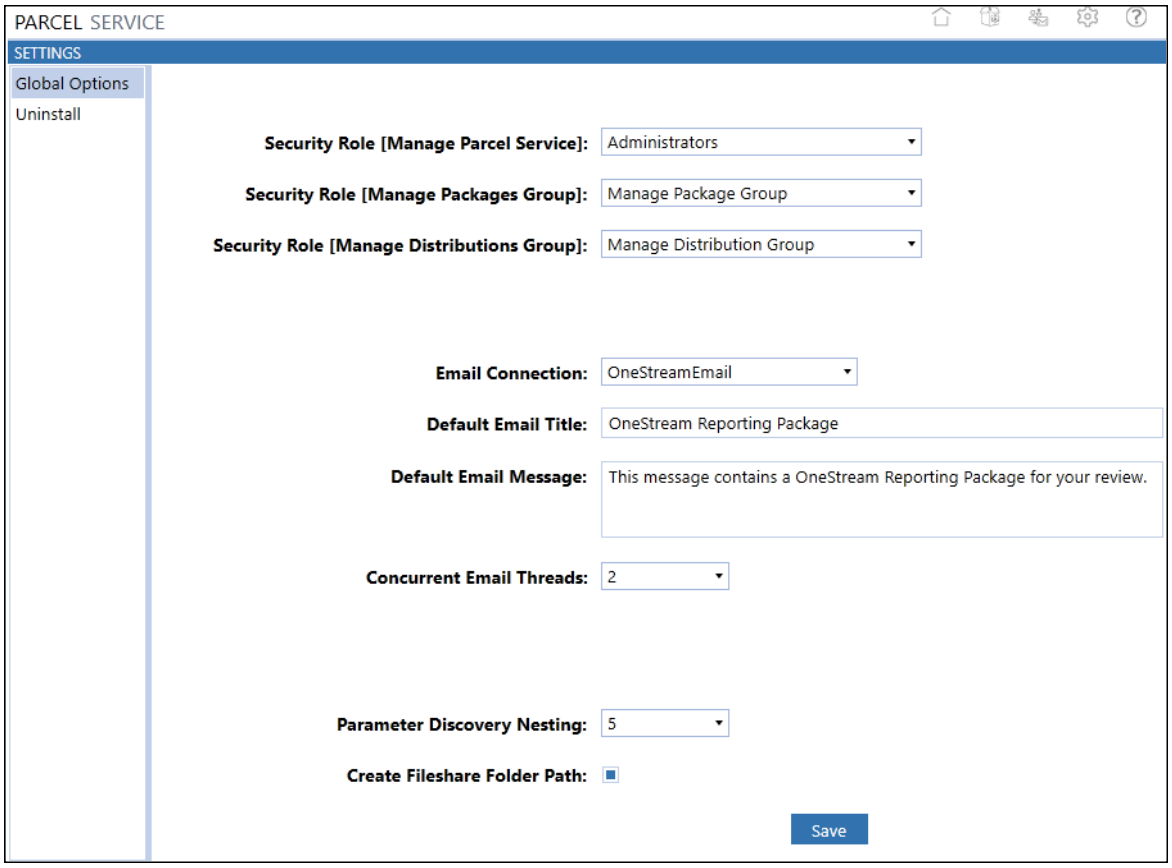
Settings

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

Global Options

The Global Options page contains key properties that guide global Parcel Service administration and is used during the initial setup and configuration of Parcel Service.

Note: All global option settings are retained during solution upgrades.



Security Role [Manage Parcel Service]

Anyone with this role is considered a super user and can configure any aspect of the Parcel Service solution. By default, only the OneStream Administrator or someone in the Administrators user group can change these settings.

Security Role [Manage Packages Group]

Members of this access group can access, copy, create, modify and ship Public packages and package groups.

Security Role [Manage Distributions Group]

Members of this access group can access, copy, create and modify Public distribution lists.

Email Connection

Select an email connection from the dropdown list. Email connections are configured in the OneStream Application Server configuration. Email connections contain all the necessary setup information for the local email provider, including the sending email address, server credentials, host, port, and other data. 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 Installation and Configuration Guide*.

See also: *Appendix 1* at the end of this guide for information on setting up OneStream encrypted email connections.

Default Email Title

The email title included in all distributions if a title is not assigned to the distribution.

Default Email Message

The email message included in all distributions if a message is not assigned to the distribution.

Concurrent Email Threads

The maximum number of email threads to run concurrently. This number is set by the OneStream Administrator and depends on the capabilities of your email provider. The default is 2.

Parameter Discovery Nesting

This controls how many times the Parameter Discovery process loops through extensible document content looking for parameters.

Create Fileshare Folder Path

This setting allows Parcel Service to create folders if a folder does not exist upon saving when specified in the **FileShare Folder Path** field.

> **Note:** Substitution variables can also be used to define file paths.

Test Mode (True/False)

Test mode allows users to test package delivery without the package being sent to the distribution list. If set to True, the package is run and logged in the Error Log rather than sending an email.

> **Note:** If users have access to maintain packages and distribution lists, they must be included in the access group for Ancillary Tables (application server setup screen).

Uninstall

The Uninstall feature allows the Parcel Service user interface or the entire solution to be uninstalled.

> **Note:** If part of an upgrade, any modifications performed on standard Parcel Service objects will be removed.

There are two uninstall options:

1. **Uninstall UI** removes Parcel Service, 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 Parcel Service because some of the dashboards or other objects may have been modified.
    - Choose this option to accept a Parcel Service update without removing the data tables.
    - The Parcel Service Release Notes indicate if an overinstall is supported.
2. **Uninstall Full** removes all the related data tables, all data, Parcel Service dashboards, and Business Rules.
    - Choose this option to completely remove Parcel Service or to perform an upgrade that is so significant in its changes to the data tables that this method is required. Only business rules deployed on Parcel Service during setup and installation are removed.

> **Caution:** Uninstall procedures are irreversible.

Parcel Service Home Page

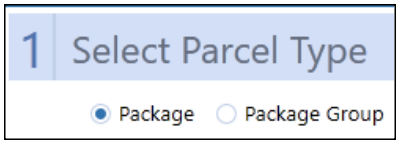
The **Parcel Service** home page is the interface used to ship packages. From the home page, you can select and ship private or public packages or package groups.

Shipping involves four steps:

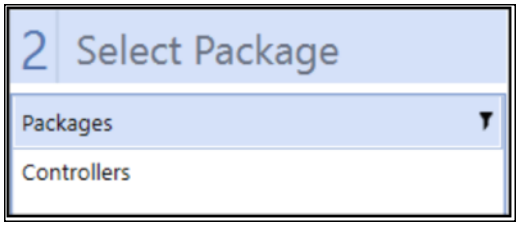
1. Select the parcel type.
2. Select the package or package group to ship.
3. Review the package contents.
4. Ship the package or package group.

   The shipment of the package is moved to a background process that can be monitored using the Task Activity log.

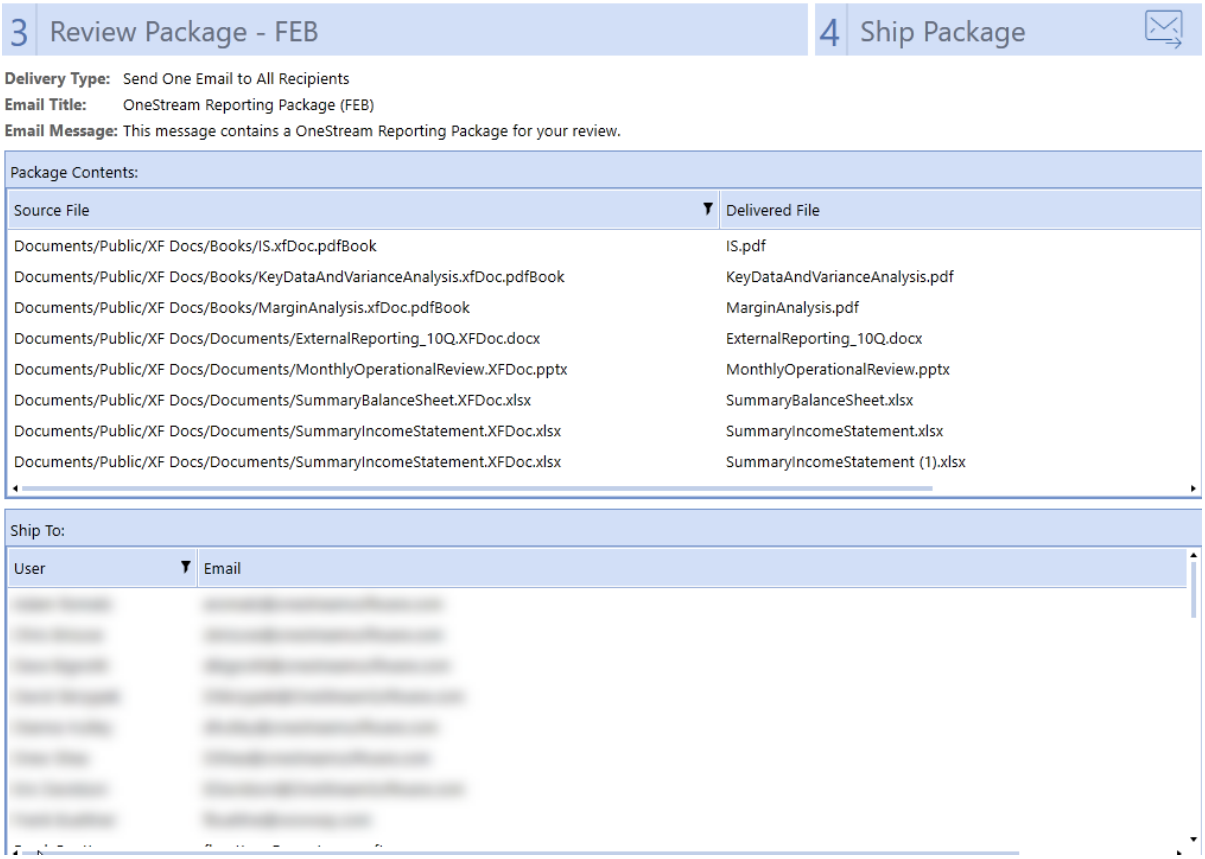
Step 1: Select Parcel Type



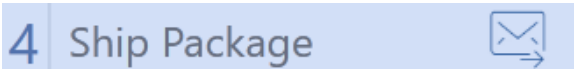
Step 2: Select a Package



Step 3: Review Package Contents



Step 4: Ship Package

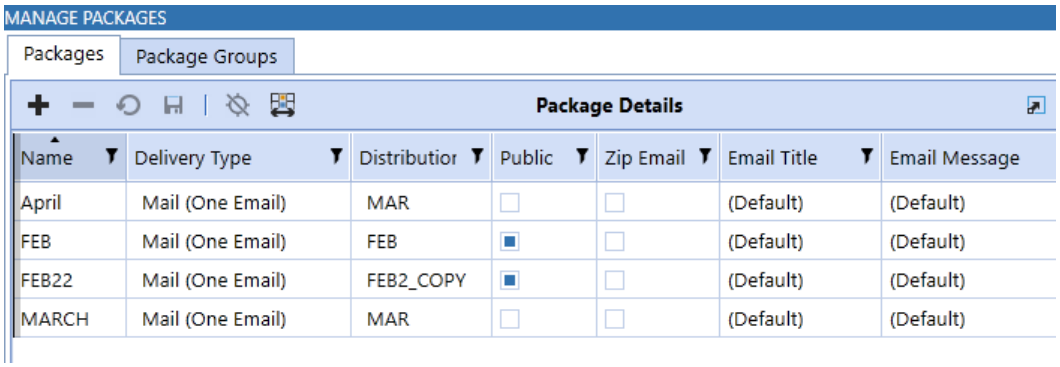


Packages

A package or package group is a list of extensible documents and/or extensible document books grouped together. Each package is assigned a distribution list that specifies to whom the package will ship. Users with permission to manage packages and package groups can create packages or groups as well as set parameters for the package details or contents. The packages or package groups can also be copied or shipped from the **Manage Packages** page.

Package Definition

To create a package, click ✚ to add a new row in the **Package Details** grid.



Delivery Type

- **Mail (One Email)**: Sends the files in the package to all members in the assigned distribution list. The recipients receive a group email (all recipients are listed in the **To** field).
- **Mail (Individual Emails)**: Sends the files in the package to all members in the assigned distribution list. Each recipient receives an individual email (only one recipient listed in the **To** field).
- **Copy Fileshare (Notification Email)**: Copies the files in the package to the file share and sends an email to all recipients in the distribution list.
- **Copy Fileshare (No Email)**: Copies the files in the package to the file share without sending a notification.

Distribution: Name of the distribution list defining the recipients of the selected package.

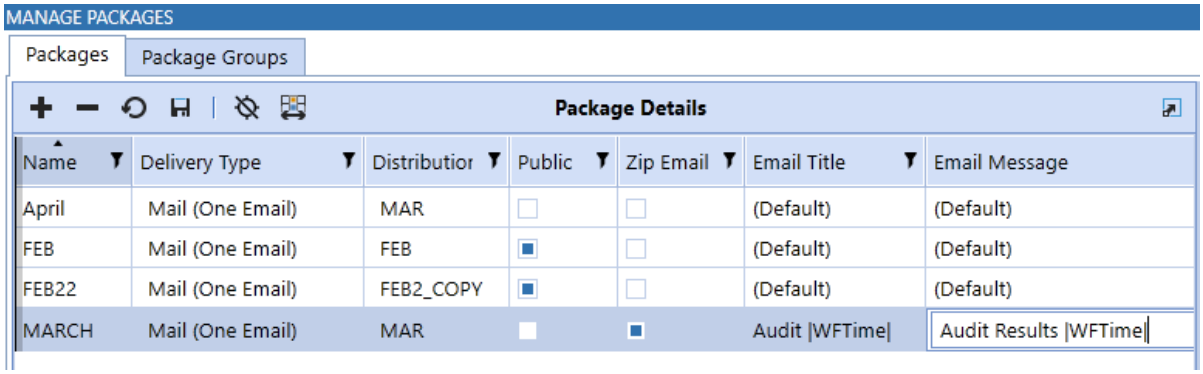
Public (True/False): Controls the availability of the package. If selected, the package is available to all users on the Parcel Service home page and can be managed by users assigned to the Manage Packages Group security role. If cleared, the package is only available to the user who created the package and the OneStream or Parcel Service Administrators.

Zip Email (True/False): When selected, this delivers the package contents in a .zip file.

> **Note:** Zip email is ignored when the Delivery Type is set to either **Copy to FileShare (Notification Email)** or **Copy to FileShare (No Email)**.

Email Title: Defines a unique email title in place of the default email title from the Settings page. Use parameters in the Email Title field (for example, Audit |WFTime|) to provide conditional parameter processing. If this value is blank, the default email title from the Settings page is used.

Email Message: Defines a unique email message in place of the default email message from the Settings page. Use parameters in the Email Message field (for example, Audit > WFTime|) to provide conditional parameter processing. If this value is blank, the default email message from the Settings page is used.

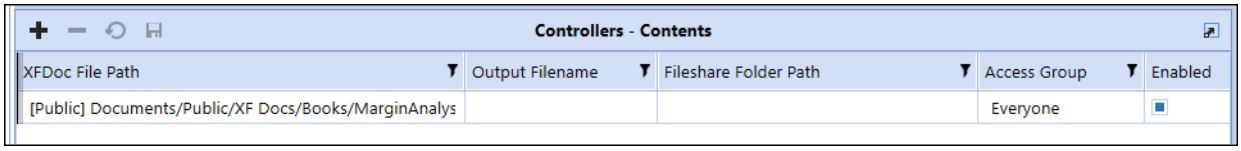


Created By: Displays the user's name that created the package. This column is only displayed for OneStream and Parcel Service Administrators.

Date Created: Displays the date and time the package was created. This column is only displayed for OneStream and Parcel Service Administrators.

Package Contents

The Contents section lists the extensible documents and books included in the package.



XFDoc File Path (Required): Displays the file path where the extensible document files are stored.

Output Filename: Enter a filename to be assigned to the package content file. A file extension is not needed because the file inherits the extension from the extensible document file path. If left blank the original filename is used.

Fileshare Folder Path: Network file path location where the package content file needs to be saved. (Optional, only required for **Copy Fileshare** delivery types.)

Access Group: Filters the package contents and ships it based on the selected access group. If the user sending the package is not in the specified access group for one of the package's content items, then that item will not be included in the package.

Enabled (True/False): Controls whether a content item is enabled within the package. Select to include the Extensible Document in the package. Clear to exclude it from the package.

Supplied Parameters – Package Level

Each extensible document may have parameters that would normally prompt you when you run the file. When running a Parcel Service package there is no prompt, so the parameters need to be specified prior to running the Parcel Service package. Package parameters apply to an entire package. To apply a specific parameter setting to the entire package, select the name of the parameter and give it a literal value. The package parameter's literal value applies to all of the package's content files. This type of parameter does not have to be used, but it is available for convenience and reduces parameter maintenance.

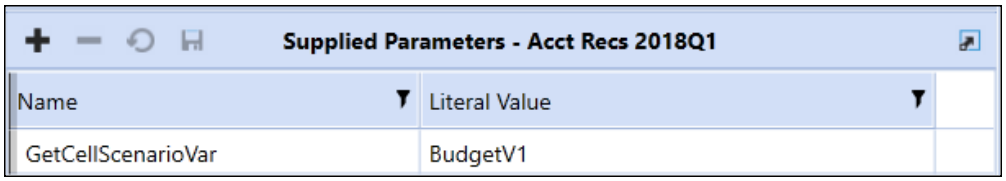
Name: Select a Parameter name from the drop-down list.

> **Note:** This list contains all Dashboard Parameters in the current application.

Literal Value: Enter the literal value to use for the named parameter.

Supplied Parameters – Content Level

Each extensible document may have parameters that would normally prompt you when you run the file. When running a Parcel Service package, there is no prompt, so the parameters need to be specified prior to running the Parcel Service package. Content parameters are required and used the selected extensible document content file. This list of parameters defines the values that must be provided to the content file for the file to be executed without user input. These values can be added to the list manually, or they can be automatically determined using the **Discover** button.



Name: Enter the name of the parameter.

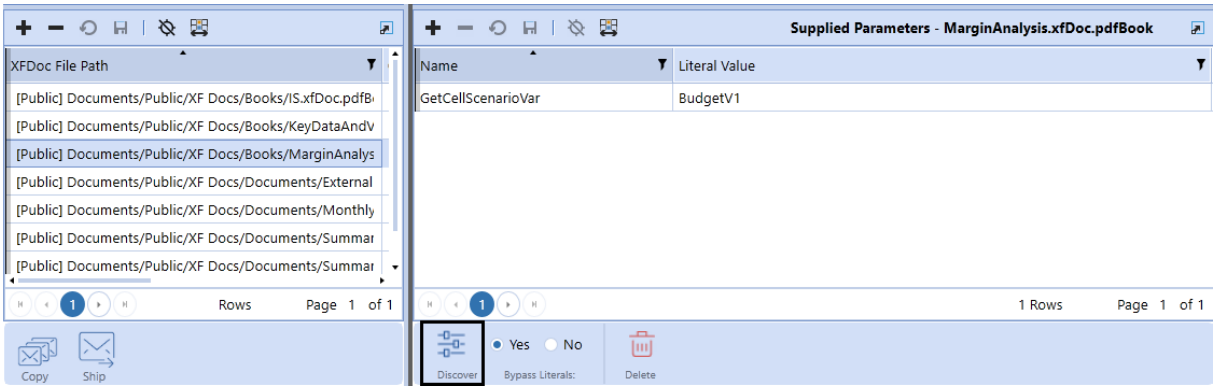
Literal Value: Literal value to use for the named parameter.

> **Note:** Literal values cannot contain a |!xyz!|(pipes and exclamation marks) definition because when the system encounters a |!xyz!| character sequence it is expecting to prompt the user for a value that cannot happen during the shipping process. Literal values can contain a |Substitution Variable| (pipes) definition because these values are defined without prompting the user.

Discover

Discover: Select a package's content file, click **Discover**, and the system searches the file to find any parameters requiring a default value. These parameters display in the supplied parameters grid allowing the user to assign a literal value.

> **Note:** Parameter Discovery uses a recursive algorithm to discover nested parameters (Parameters within Parameters). By default, the system will recursively perform the Parameter Discovery process ten times, which is controlled by the **Parameter Discovery Nesting** option in the solution setup page.



Bypass Literal (Yes/No): Select to bypass all literal parameters when using the Discover feature.

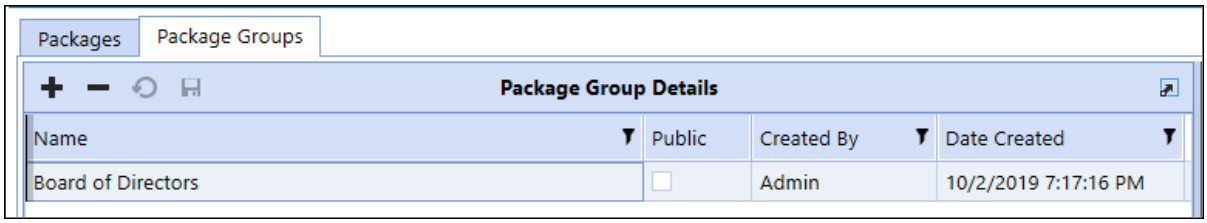
> **Note:** All changes made to parameter values during the shipping process do not change the actual value of the Dashboard parameter or the original extensible document or book.

Package Groups

A Package Group consists of multiple packages. The Package Group page allows you to define a package group and assign packages to it. You can copy a package group and ship packages from this page.

Package Group Definition

To create a package group, click ➕ to add a new row in the **Package Group Details** grid.



Name: Name of the package group.

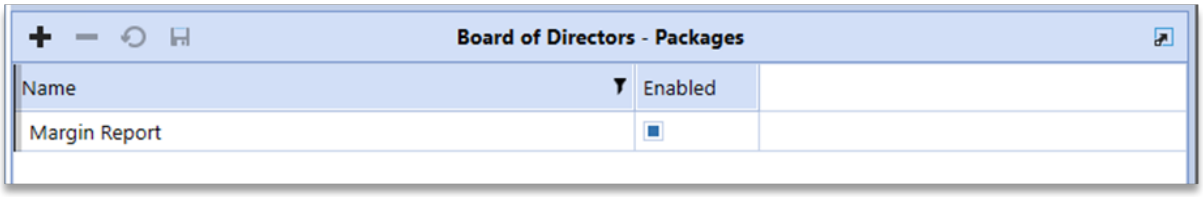
Public (True/False: Controls the availability of the package group. If selected, the package group is available to all users on the Parcel Service home page and can be managed by users assigned to the Manage Packages Group security role. If cleared, the package group is only available to the user that created the package and the OneStream or Parcel Service Administrators.

Created By: Displays the user's name that created the package group. This column is only displayed for OneStream and Parcel Service Administrators.

Date Created: Displays the date and time the package group was created. This column is only displayed for OneStream and Parcel Service Administrators.

Packages – Package Group Level

The Packages section lists all the packages included in the package group.



Name: Name of the package.

Enabled (True/False): Controls whether a package is enabled within a package group. Select to include the package in the package group. Clear to exclude the package.

Supplied Parameters – Package Group Level

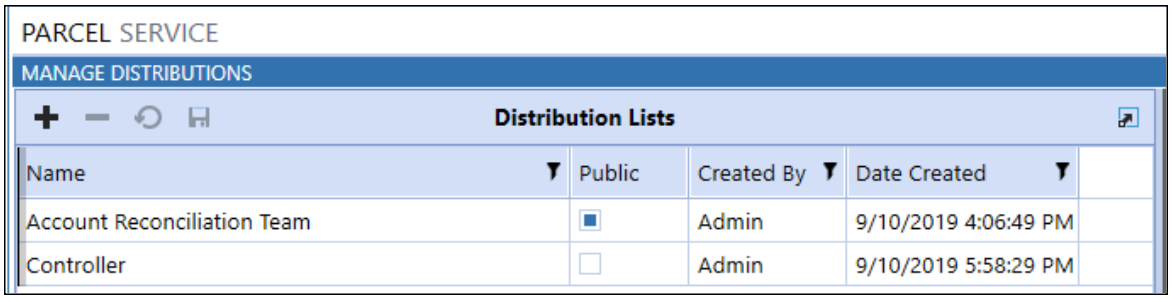
Each extensible document may have parameters that would normally prompt you when you run the file. When running a Parcel Service package group, there is no prompt, so the parameters need to be specified before shipping packages. Supplied parameters are required for the selected extensible document content file and upon processing will cascade through all documents located in the group of packages. This list of parameters defines the values that must be provided to the content file for the file to be executed without user input. These values can be added to the list manually.

Name: Enter the name of the parameter.

Literal Value: Literal value to use for the named parameter.

Distribution Lists

Distribution lists define the list of email addresses and file share locations to which packages should be shipped.



Name: Name of the distribution list.

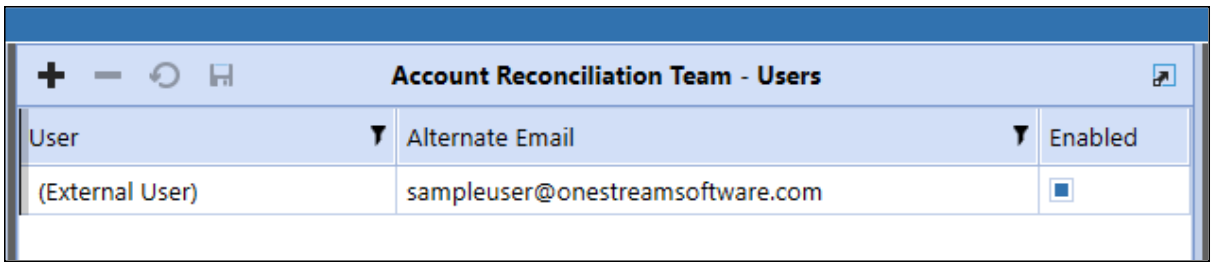
Public (True/False): This controls the availability of the distribution list. If selected, the distribution list is included in the **Package Details** dropdown list for all users to select and can be managed by users assigned to the Manage Distributions Group security role. If cleared, the distribution list is only available to the user that created the distribution list and the OneStream or Parcel Service Administrators.

Created By: Displays the user's name that created the distribution list. This column is only displayed for OneStream and Parcel Service Administrators.

Date Created: Displays the date and time the distribution list was created. This column is only displayed for OneStream and Parcel Service Administrators.

Distribution List - Users

The list of individual users to include in the distribution list.



User (Required): Select a user from the dropdown list. Selected users are included in the distribution list and the assigned email address is used during the shipping process.

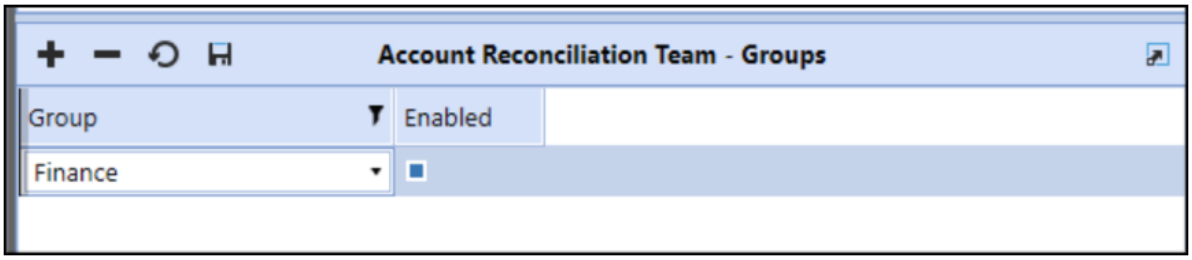
> **Note:** Select **External User** in order to enter an alternate email address.

Alternate Email: Enter the email address to use instead of the email assigned to the OneStream User ID. If you select External User, then you must enter an external email address in this field.

Enabled (True/False): If selected, the user is included in the distribution list. If cleared, the user is excluded from the distribution list.

Distribution List - Groups

The security group members to include in the distribution list.



Group: The OneStream Security Group members to include in the distribution list.

Enabled (True/False): If selected, the security group is included in the distribution list. If cleared, the group is excluded from the distribution list.

Distribution List - Members

This section provides a preview of the combined user and group email distribution members defined for the distribution list. The list represents all individual members and all assigned security group members.

Copy
The copy feature allows the distribution list to be copied.

Help and 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 and 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: OPS_PV6.0.0_SV102_PackageContents.zip

Identifier	Description
OPS	Solution ID
PV6.0.0	Minimum Platform version required to run solution
SV102	Solution version
PackageContents	File name

GetAllLiteralParams

Literal parameters are meant for static values and should not be used to hold values that change on a regular basis. Using a literal parameter in such a manner can cause issues with dashboard processing for users. Use input parameters for values that change regularly.

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:

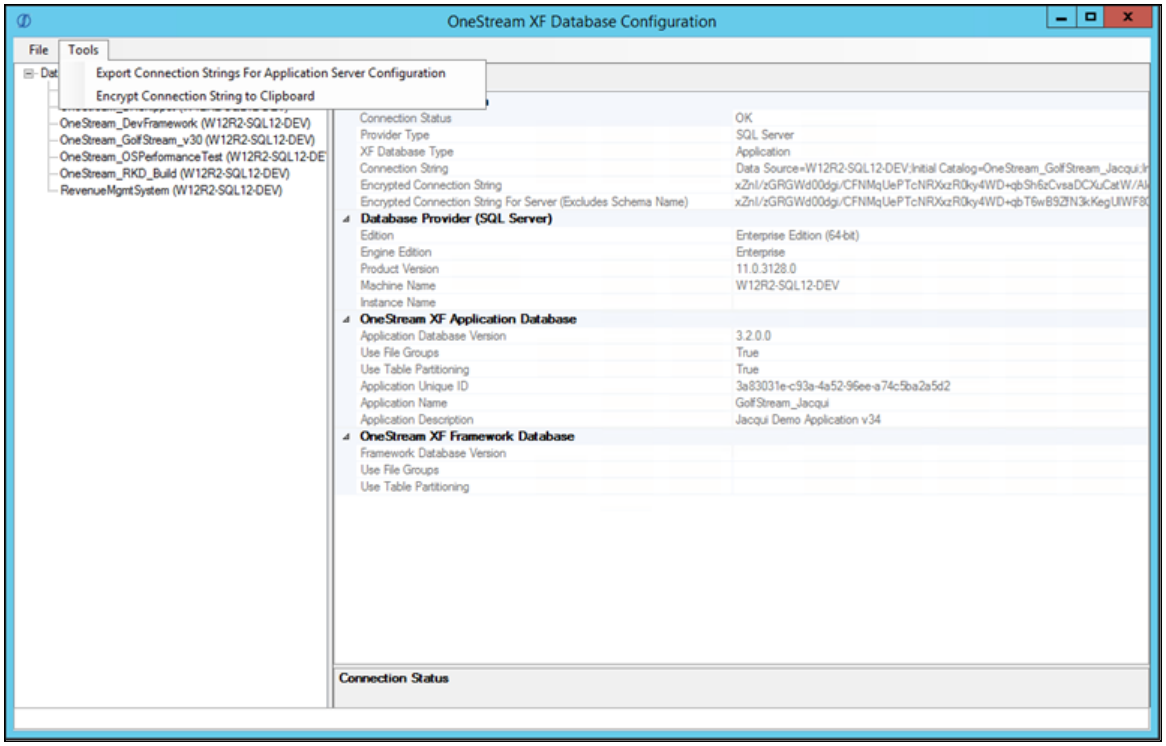
- Major changes to business rules or custom tables within a MarketPlace solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any dashboard object or business rule, consider renaming it or copying it 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.

Appendix 1

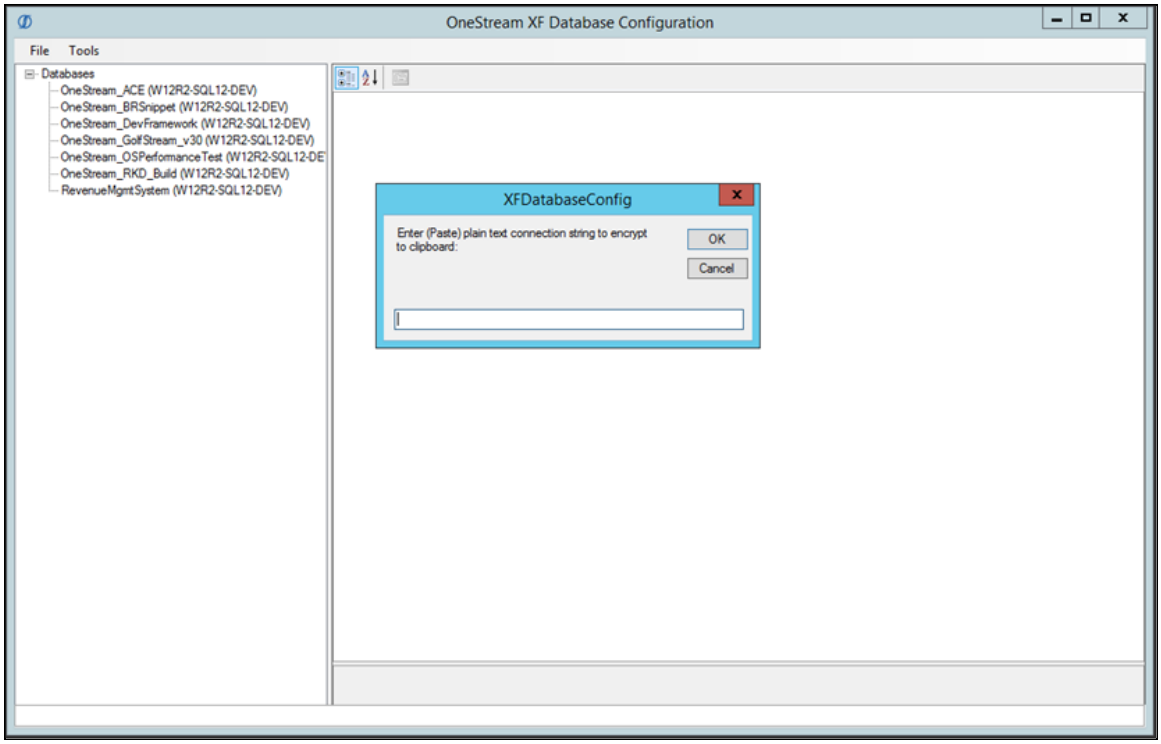
Encrypting Connection Information

Encrypt the email connection string using the OneStream Database Configuration Utility.

1. Open the OneStream Database Configuration Utility.



2. From **Tools**, select **Encrypt Connection String to Clipboard**.



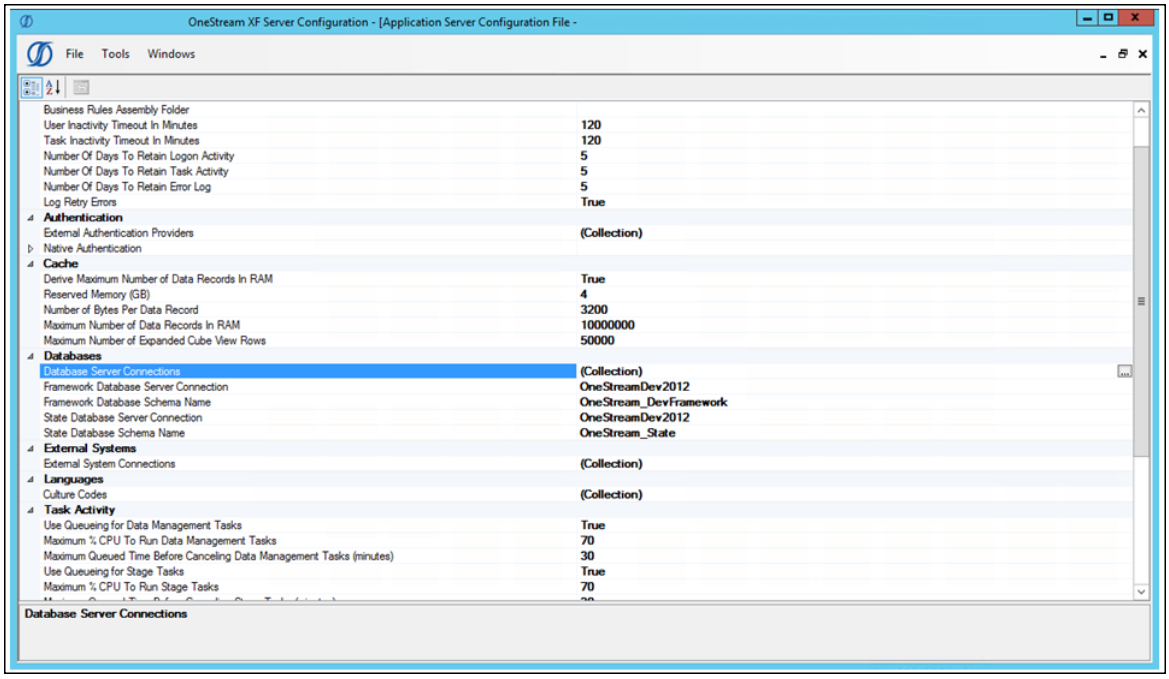
3. Copy the email connection string into the Configuration Tool and click **OK**.

   ```
   SmtpHost=[smtp.office365.com], SmtpPort=[587], EnableSSL=[True],
   SmtpSourceMailAccount=[userID@youremaildomain.com],
   SmtpSourceMailAccountPassword=[password]
   ```

   The encrypted string is then stored to the clipboard.

   ```
   XScpcDzo3an7EWAAp6Wvz1IZWE3Q+Fo8DSx0OpacS0Yp5X4sHXtiQGdAoNmNGU48xOa3xD3C
   68yAl7B8aXUbv02lj4921ErgN2R+E1qlLG24pO8a62X0n/q4PS70xzosL7R9HzKWT0txtfbp
   JMUPYrIhCDz6Ubd52/buVABQyUxf2c0Y1BmgIKE//6eOcMCv0D5abX6oKbEmZLlms7vXyuic
   DKaYheBNX/vbtkA4=
   ```

4. Open the OneStream Application Server Configuration Tool.



5. Open **Database Server Connections**.
6. Add a new Database Connection.