



# SNIPPET EDITOR SETUP & INSTRUCTIONS

PV 620 SV 100

# Contents

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- Overview ..... 2**
- Setup & Installation..... 3**
  - Dependencies..... 3
  - Select the Snippet Editor Development Location ..... 3
  - Create the OneStream XF Development Application ..... 4
  - Application Server Settings..... 4
    - Configure the OneStream XF Application Server ..... 4
  - Install Snippet Editor ..... 5
  - Set Up Snippet Editor ..... 5
    - Create Tables and Launch Solution..... 6
    - Package Contents..... 6
- Settings..... 7**
  - Global Options ..... 7
    - Default Author ..... 7
  - Categories ..... 7
    - Categories and SubCategories Button Bar ..... 8
    - Create Categories and SubCategories..... 9
  - Uninstall ..... 9
- Editor ..... 10**
  - Snippet Editor Filters..... 10
  - Snippet Editor Buttons..... 11
  - Import Snippet Data..... 11
  - Download Template..... 12
  - Pivot ..... 12
- Help & Miscellaneous Information..... 13**
  - Display Settings ..... 13
  - Package Contents & Naming Conventions..... 13
  - Solution Database Migration Advice ..... 14
  - MarketPlace Solution Modification Considerations ..... 14

## OVERVIEW

The Snippet Editor solution lets you create and edit sample OneStream XF snippets. Snippets provide pre-tested code samples, making it easier to write high quality scripts in OneStream XF in a shorter amount of time.

Hundreds of sample snippets are included and ready to be imported into any OneStream XF server instance. There are several categories of snippet samples, including:

- Formulas
- Calculations
- Lists
- Data flows
- Rules
- Helpers
- Mappings

# SETUP & INSTALLATION

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

**See also:** [MarketPlace Solution Modification Considerations](#)

## Dependencies

Component	Description
OneStream XF 6.2.0 or later	Minimum OneStream Platform version required to install this version of Snippet Editor.

Experience is required to write VB.NET code snippets in OneStream XF and in the Snippet Editor. Refer to Microsoft VB.NET reference documentation for more information on writing snippets.

## Select the Snippet Editor Development Location

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

You also need consider if the Development or Production environments share the same OneStream Framework. Snippets are stored on the OneStream Framework database. If you are using the same OneStream Framework in the Development and Production environments, you do not need to migrate. Additionally, only the snippets themselves would need to be migrated. These are migrated by extracting the snippets from the System tab, then loading them back into OneStream XF after a database migration.

**See also:** [Solution Database Migration Advice](#)

**Production OneStream XF Application:** The primary advantage of building Snippet Editor in a Production application is that you do 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 recommends that you implement **Snippet Editor** in the Development environment with a fresh copy of the Production application before starting work.

**Development OneStream XF Application:** As a best practice, use the Development OneStream XF application to build Snippet Editor.

# Create the OneStream XF Development Application

1. Ensure all OneStream XF artifacts relating to Snippet Editor are in the Production application.
2. Copy your Production OneStream XF application to your Development environment and rename it. This Development version is used for your Snippet Editor project.

## Application Server Settings

You may need to edit the OneStream XF Application Server Configuration so users can create and change data in the additional database tables used by Snippet Editor. 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 XF Application Server

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



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

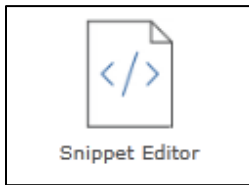
1. Start the OneStream XF Server Configuration Utility as an Administrator.
2. Select **Open Application Server Configuration File > Database**
3. Edit the following **OneStream Database Server properties**:
  - **Access Group for Ancillary Tables:** Select a group that includes those who access records.
  - **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.

OneStream Database Server properties:	
> Azure Database Connection Settings	
> Connection String Settings	
▼ General	
Access Group for Ancillary Tables	DB_ANC_Access_Group ← Read Access
Allow Database Creation via UI	True
Can Create Ancillary Tables	True
Can Edit Ancillary Table Data	True
Database Provider Type	SqlServer
Is External Database	False
Maintenance Group for Ancillary Tables	DB_ANC_Maintenance_Group ← Read Access
Name	OneStream Database Server
Table Creation Group for Ancillary Tables	Everyone
Use File Groups when Creating Databases	True
Use Table Partitioning when Creating Databases	True

4. Restart Internet Information Server.

## Install Snippet Editor

1. On the OneStream XF MarketPlace Dashboard, click **MarketPlace > Snippet Editor**.

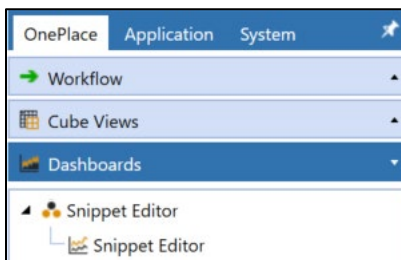


2. On the Snippet Editor Solution page, select the appropriate OneStream XF platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and then click **Download**.
4. Log in to OneStream XF.
5. On the **Application**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

The first time you run Snippet Editor, you are guided through the table setup process.

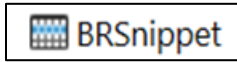
- In OneStream XF, click **OnePlace > Dashboards > Snippet Editor > Snippet Editor**.



## Create Tables and Launch Solution

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

This step may be necessary when upgrading even if tables already exist. Snippet Editor does not drop existing tables but modifies table structures and will add new ones if necessary.



### 2. When setup is complete, click **Step 2: Launch Solution** to open Snippet Editor.

## Package Contents

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

*Business Rules:* The following Business Rules are included:

### **SNE\_HelperQueries**

Dashboard dataset Business Rule that can look up lists of snippets and snippet categories.

### **SNE\_SolutionHelper**

Dashboard extender Business Rule that allows for the addition, maintenance and navigation of snippets on the main dashboard.

### **SNE\_ParamHelper**

Dashboard XFBR string Business Rule provides conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

# SETTINGS



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

## Global Options

The **Global Options** page should be the first page accessed during the initial setup and configuration of Snippet Editor.



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

SNIPPET EDITOR

SETTINGS

Global Options

Categories

Uninstall

Default Author: [Enter Default Author]

Save

### Default Author

The **Default Author** is automatically assigned to a new snippet. This freeform text field displays in the **Author** field of Snippet Editor grids.

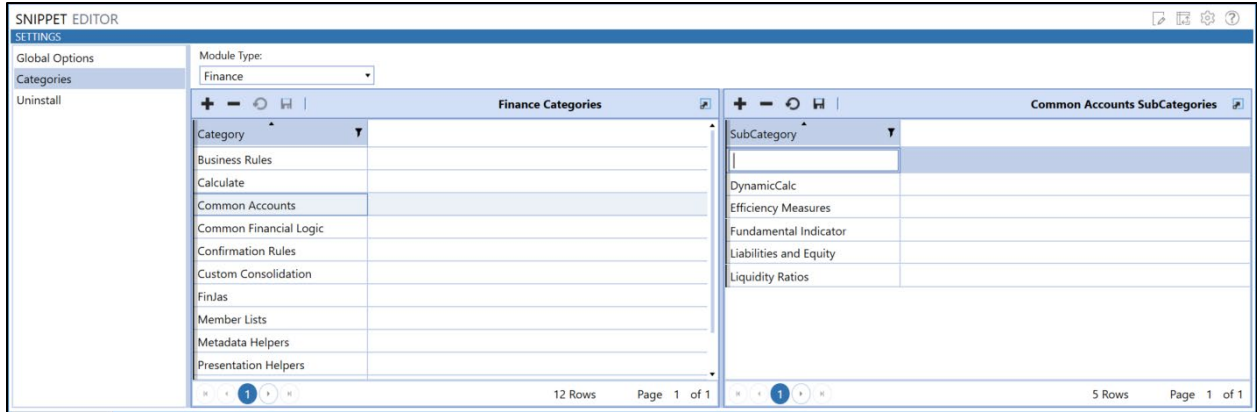


**Note:** You can change an individual snippet author's name on the **Editor** page.

## Categories

Organize your snippets by creating categories and sub-categories. Categories and sub-categories align your snippets into logical groups for the current module type and let you customize their display in Snippet Editor.





The **Module Type** drop down contains a list of predefined snippet modules. Each module type is only available in specific areas of OneStream XF. Module types include:

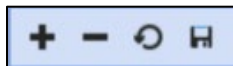
- General
- Finance
- Stage
- CubeView
- Dashboard
- Extender
- Event Handler

The following grid shows each module's availability in the Business Rules and other areas of OneStream XF.

Module	Business Rule Availability										Other		
	Finance	Parser	Connector	Conditional Rule	Derivative Rule	Cube View Extender	DB Data Set	DB Extender	XFBRString	Extensibility	Member Script	Cube Views	Conf Rules
Finance	Y										Y		Y
General	Y			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Stage		Y	Y	Y	Y								
CubeView						Y						Y	
Dashboard							Y	Y	Y				
Extender										Y			
EventHandler										Y			

### Categories and SubCategories Button Bar

Use buttons in the **Categories** and **SubCategories** panes to add, delete, and save category and sub-category entries. All created categories and sub-categories appear in the **Category** and **SubCategory** drop-downs on the **Editor** page, which lets you filter the list of snippets on that page.



See also: [Snippet Editor Page](#)

**Insert Row** - Add a new category or sub-category.

**Delete Row(s)** - Select a category or sub-category in the **Category** or **SubCategory** pane, then click **Delete** in that pane to delete the item.

**Cancel** - removes changes made to categories and sub-categories since the last save.

**Save** - Saves updated task groups.

## Create Categories and SubCategories

The **Categories** page includes a **Categories** pane and a **SubCategories** pane, where you can build out the category and sub-category relationships for the current module type:

1. In the **Module Type** drop-down, select the module type for which you want to create categories and sub-categories.
2. Click the **Add** button in the **Categories** pane to create a new row, then click the Category column in the new row to edit its contents.
3. Enter the name of the category you want to add and click **Save**.
4. Click **Add** in the **SubCategories** pane to create a new sub-category row, then click the SubCategory column in the new row to edit its contents.
5. Enter the name of the sub-category you want to add and click **Save**.
6. Repeat steps 2 through 5 to add additional categories and sub-categories.

## Uninstall

The Uninstall feature allows the Snippet Editor User Interface or the entire solution to be uninstalled.

Note that if part of an upgrade, any modifications performed on standard Snippet Editor objects will be removed. There are two Uninstall options:

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

# EDITOR



Once you create categories and sub-categories, use the **Editor** page to create and edit snippets. You also use this page to download a Microsoft Excel template and create snippet information to import back into the Snippet Editor.

Name	Description	Author	Search Terms	Content
Asset Turnover	Efficiency Measure: The Asset Turnover ratio is an indicator of the e	OneStream	Account, Asset Turnover	'Calculate Asset Turnover 'Formula: Sales / Inventory  Return api.Data.GetDataCell("Divide(A#[YourSaleAccount], A#[YourInventoryAccount])")
Average Collection Period	Efficiency Measure: The approximate amount of time it takes for a l	OneStream	Account, Average Collectio	'Calculate Average Collection Period 'Formula: Accounts Receivable/ (Annual Credit Sales/ 365) or 365/ Receivables Turnover  Return api.Data.GetDataCell("Divide(365, A#[YourReceivablesTurnoverAccount])")
Effective Tax Rate Percentage	Efficiency Measure: The net rate a taxpayer pays if all forms of taxes	OneStream	Account, Effective Tax Rate	'Calculate Effective Tax Rate (ETR) Percentage 'Formula: Income Tax Percent / Pretax Income  Return api.Data.GetDataCell("Divide(A#[YourIncomeTaxPercentAccount], A#[YourPretaxIncomeAccount])")
Gross Margin	Efficiency Measure: The gross margin represents the percent of tot	OneStream	Account, Gross Margin	'Calculate Gross Margin 'Formula: Gross Margin Pct = Gross Profit / Net Sales  Return api.Data.GetDataCell("Divide(A#[YourGrossProfitAccount], A#[YourNetSalesAccount])")
Inventory Period	Efficiency Measure: Inventory period is a measure of the average n	OneStream	Account, Inventory Period	'Calculate Inventory Period 'Formula: Average Inventory/ (Annual COGS/365) or 365/ Inventory Turnover  Return api.Data.GetDataCell("Divide(365, A#[YourInventoryTurnoverAccount])")
Inventory Turnover	Efficiency Measure: The Inventory turnover is a measure of the num	OneStream	Account, Inventory Turnov	'Calculate Inventory Turnover 'Formula: Cost of Goods Sold / Average Inventory  Return api.Data.GetDataCell("Divide(A#[YourCOGSAccount], A#[YourInventoryAccount]:V#YearAvgToDate)")
Net Profit Percent	Efficiency Measure: It reveals the remaining profit after all costs of	OneStream	Account, Net Profit Percent	'Calculate Net Profit Percent 'Formula: Operating Profit/Sales or Operating Profit/Turnover  Return api.Data.GetDataCell("Divide(A#[YourOperatingProfitAccount], A#[YourSalesAccount])")
Operating Margin	Efficiency Measure: Operating margin is a measurement of what pr	OneStream	Account, Operating Margir	'Calculate Operating Margin 'Formula: Net Income / Net Sales  Return api.Data.GetDataCell("Divide(A#[YourNetIncomeAccount], A#[YourNetSalesAccount])")
Profit Margin	Efficiency Measure: The percentage of revenue remaining after all c	OneStream	Account, Net Profit Margin	'Calculate Net Profit Margin 'Formula: Net Profit Margin = Net Income / Net Sales  Return api.Data.GetDataCell("Divide(A#[YourNetIncomeAccount], A#[YourNetSalesAccount])")
Receivables Turnover	Efficiency Measure: The receivables turnover ratio is an activity rat	OneStream	Account, Receivables Turnc	'Calculate Receivables Turnover 'Formula: Net Credit Sales/ Average Accounts Receivable  Return api.Data.GetDataCell("Divide(A#[YourNetCreditSalesAccount], A#[YourAccountReceivableAccount]:V#YearAvgT

Select the grouping (Module | Category | SubCategory) using the drop down lists. Once selected, click **Refresh** to display the snippets for the selected grouping. You can also add additional snippets directly in the snippet grid, or edit existing snippets.

## Snippet Editor Filters

Snippet Editor filters display on the **Snippet Editor** page. Use the drop-down lists to apply filters to see only specific snippets.

Module Type: Finance | Category: Common Accounts | SubCategory: Liabilities and Equity | Refresh | Import | Download

**Module Type** - These are the pre-defined module types in the system that categories and sub-categories are based. Select one of the module types from the list to display snippets created for that type. Module types are defined when Business Rules are created in OneStream XF.

See also: [Categories](#)

**Category** - These are the categories for the selected module using the **Categories** page of the **Snippet Editor** settings. Use the list to select the category for which you want to view and create snippets.

See also: [Categories](#)

**SubCategory** - These are the sub-categories you created for the selected module and category using the **Categories** page of the **Snippet Editor** settings. Use the list to select the sub-category within the selected category for which you want to view and edit snippets.

See also: [Categories](#)

## Snippet Editor Buttons

**Refresh** - Refreshes the grid that displays snippet data. Click **Refresh** after selecting display criteria in the Module Type, Category, and SubCategory dropdowns to display snippet content matching the selection criteria.

**Import** – Allows you to navigate to and select a Microsoft Excel file containing snippet data you want to import into OneStream XF Snippet Editor.

See also: [Import Snippet Data](#)

**Download** – Allows you to download a Microsoft Excel template you can use to create or load snippet data from an external source.

See also: [Download Template](#)

## Import Snippet Data

OneStream provides a Microsoft Excel template you can use to create snippet data or load it from an external source, then import data back into OneStream. In the template on the **Snippet Template** tab, enter updates to or add new snippet data in the ranges between the blue lines. Insert additional rows within this range to allow for more snippet data.

The **Module Type** field in the template lets you select a predefined module type . When loading snippet data, each snippet's module type must match the module types in the list, otherwise an error occurs during import.

To manually enter snippet data in the template, start by selecting a valid module type from the dropdown. Then you can enter data in the rest of the fields to complete a snippet data record.

Module Type	Category	SubCategory	Name	Description	SearchTerms	Content
General	Business Rules	Data Helpers	Execute Query	Execute Query against Application Database	Data, Query, Application, Database	'Define SQL Query Dim sql As New Text.StringBuilder sql.AppendLine("Select * From CustomTableName ") '<- Define custom SQL query sql.AppendLine("Where Field1 = x ") '<- Define custom SQL query sql.AppendLine("Order By FieldX") '<- Define custom SQL query 'Define SQL Query
General	Business Rules	Data Helpers	Execute Query	Execute Query against External Database	Data, Query, External, Database	Dim connectionString As String = "Revenue Mgmt System" '<- Enter name of predefined connection string (In App Server Config) Dim sql As New Text.StringBuilder sql.AppendLine("Select * From CustomTableName ") '<- Enter your SQL query 'Define SQL Query
General	Business Rules	Data Helpers	Execute Query	Execute Query against Framework Database	Data, Query, Framework, Database	Dim sql As New Text.StringBuilder sql.AppendLine("Select * From FrameworkTable ") '<- Define custom SQL query sql.AppendLine("Where Field1 = x ") '<- Define custom SQL query sql.AppendLine("Order By FieldX") '<- Define custom SQL query
General	Business Rules	Data Helpers	Open Application	Open a connection to the Application database	Connect, Connection, Data, Open, Application	'Open connection to Application database Using dbConnApp As DBConnInfo = BRApi.Database.CreateApplicationDbConnInfo(s) End Using

After entering data in the template, save it and close the file before importing.

## Download Template

OneStream provides a Microsoft Excel template you can use to define your snippets. Once defined, you can import the snippet data into OneStream XF, where you can view and further edit them in the Snippet Editor. Use the **Snippet Template** tab in the template to enter updates to or add new snippet entries in the ranges between the blue lines. Insert additional rows within this range to allow for more snippet data.

After entering data in the template, save it and close the file before importing.

## Pivot



The **Pivot** page displays all snippets in a grid and has drag and drop capabilities which allow users to pivot on any field in the grid.

Use the **Pivot** page to see only the specific existing snippets you want to focus on. Drag a column to the blue row at the top of the grid to pivot on that field.

Pivot					
Drag a column header and drop it here to group by that column					
Module Type	Category	SubCategory	Name	Description	
CubeView	Presentation Help	Reporting	Cube View Extender - Header and Footer	Prevent the Center Subtitle from wrapping b	
CubeView	Presentation Help	Reporting	Cube View Extender - Change Header Co	Control the header font, color, or background	
CubeView	Presentation Help	Reporting	Cube View Extender - Footer style	Control the Footer style	

# HELP & MISCELLANEOUS INFORMATION



This page contains solution documentation for the Snippet Editor.

## 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.

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:** SNE\_PV6.2.0\_SV100\_PackageContents.zip

Identifier	Description
SNE	Solution ID
PV6.2.0	Minimum XF Platform version required to run solution
SV100	Solution version
PackageContents	File name

## Solution Database Migration Advice

All updates made in Snippet Editor are stored in the BRSSnippet table in the framework. The data for the BRSSnippet table can be extracted to an XML file, then loaded back into OneStream XF after migrating the database.

1. In OneStream XF, click **System > Tools > Load/Extract**.
2. Click the **Extract** tab, then select **Snippets** from the **File Type** drop-down. Snippet items to extract appear in the Items to Extract tree view. All snippets are selected for extraction by default.
3. Click **Extract**, then use the Windows **Save As** dialog box to navigate to and select the location to store the extract XML file.
4. Click **OK**.

Once the framework database is migrated, you can load the XML file back into OneStream XL.

1. In OneStream XF, click **System > Tools > Load/Extract**.
2. Click the **Load** tab, then click the ellipsis button in the File Name field.
3. Use the Windows **Open** dialog box to navigate to and select the location where you stored the extracted XML file.
4. Click **Open**, then click **Load** to load the snippet data back into OneStream XF.

A progress bar indicates when the load completes.

## 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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