



Table Data Manager Guide

PV620 SV100

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Overview

Table Data Manager was built to enable the management of tables and views in an Azure SQL Database. A design environment facilitates the defining of tables and views. The separation between the design environment and database implementation provides flexibility. Table and view definitions can be copied between databases, along with data records between tables. Active transactions can be reviewed to uncover possible locking/blocking issues between each database environment.

Table Data Manager provides the following:

- Access to application or external database architecture.
- Ability to manipulate tables and views inside of a database.
- A solution for consultants to interact with the database for the delivery of customer-driven solutions.

Access to Table Data Manager is limited to those with the System Administrator security role. This should be strictly enforced because of accessibility to application information and controls.

Getting Started

Use the following information to understand prerequisites and dependencies, plan your installation, and configure the database server.

Note: Before beginning setup, verify that the SQL server has table creation rights on the SQL database to create the custom tables.

Application Server Settings

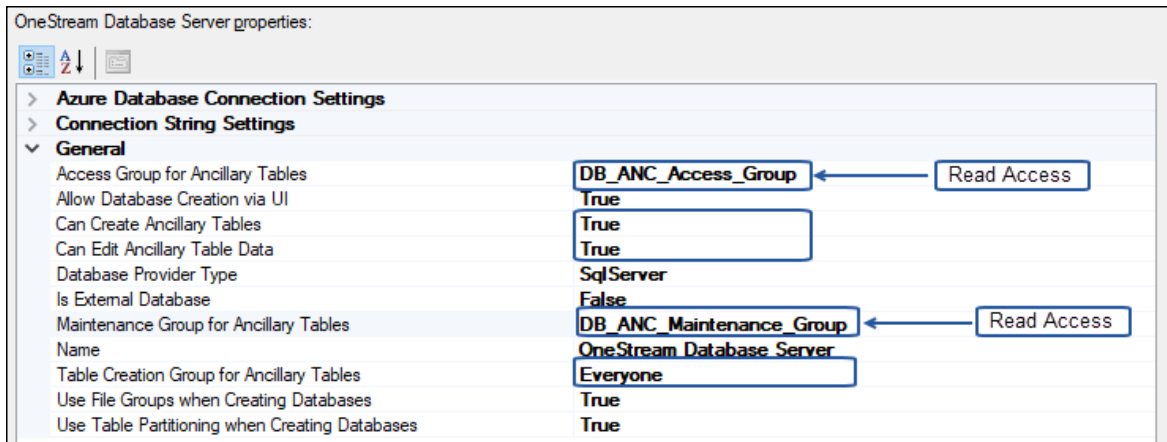
You may need to edit the OneStream Application Server configuration so users can create and change data in the additional database tables used by Table Data Manager. If other MarketPlace Solutions are already in the application, these adjustments may already exist.

Configure the OneStream Application Server

Be sure that these security group settings include those who will be working on and setting up Table Data Manager before you begin.

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. 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 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:** Administrators



4. Restart Internet Information Server.

Install Table Data Manager

1. From the OneStream MarketPlace Dashboard, click **MarketPlace** > **Table Data Manager**.



2. On the Table Data Manager Solution page, select your OneStream platform version from the **Minimum Platform Version** dropdown list.

This selection automatically displays the appropriate solution version in the next box.

3. Select the most recent version from the **Solution Version** dropdown 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.

Package Contents and Naming Conventions

The package filename contains multiple identifiers that correspond with the Platform. To preserve the integrity of the naming conventions, renaming any of the elements contained in a package is discouraged.

Example package name: TDM_PV6.2.0_SV100_PackageContents.zip

Identifier	Description
TDM	Solution ID
PV620	Minimum Platform version required to run solution
SV100	Solution version number
PackageContents	Filename

Software Dependencies

The following table describes software dependencies:

Component	Description
OneStream 6.2.0 or later	Minimum OneStream Platform version required to install this version of Table Data Manager.

Select the Table Data Manager Development Location

Before you begin the installation, decide whether to build Table Data Manager directly in the Production OneStream application or in a separate Development OneStream application. This section provides some key considerations for each option.

Note: OneStream Software strongly recommends that you implement Table Data Manager 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 Table Data Manager.

See Also: [MarketPlace Solution Modification Considerations](#)

Solution Setup

You need to set up tables for Table Data Manager.

1. Select **Table Data Manager** from **OnePlace > Dashboards > Table Data Manager**. This takes you to the Table Data Manager Setup screen to create the required tables. After initial setup, this is the default viewer when you click into Table Data Manager.
2. Click **Setup Tables** to create or update required solution tables and select the feature you need to create custom tables for (for example, Guided Reporting).
3. Click **Launch Solution**.

Note: Before running the setup, ensure that the account used to access SQL server has table creation rights to the SQL database to create custom tables.

Home


	The Home page contains the Database selection dropdown.
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TABLE DATA MANAGER

HOME

Database

SELECT A DATABASE

Settings




	<p>The Settings page contains a BI Blend section which has a list of External databases you have to set up. You can select which of these databases you use as your BI Blend database in order to review BI Blend statistics. It also contains Uninstall options.</p>
<p>BI Blend Database (s)</p>	<p>This type of database is a special database created to support the BI Blend "read-only" aggregate storage model which is accessed through the OneStream Workflow. Table Data Manager reports upon additional statistics captured during the creation of this database which can be found under Statistics. More than one type of this database can exist and for Table Data Manager to know if this extra data exists, the setting helps to determine which database selection will have the information.</p>

Table Data Manager Uninstall Options

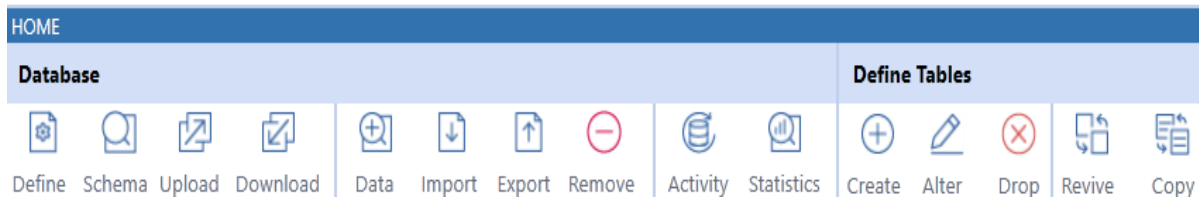
	<p>Uninstall UI removes Table Data Manager but leaves the related data tables with records in place. Use this option if you want to accept a Table Data Manager update without removing the data tables. The Table Data Manager Release Notes will indicate if an overinstall is supported.</p> <p>For some releases, this step should be performed before accepting any new version of Table Data Manager since some of the Dashboard or other objects may have been renamed. Note that some Global Options will also be cleared because their values are stored in Parameters under Dashboards.</p>
	<p>Uninstall Full removes Table Data Manager including the related data tables and records. Use this option to completely remove Table Data Manager or to perform an upgrade that is so significant in its changes to the data tables that this method is required.</p>

Caution: The Uninstall procedure cannot be reversed.

Using Table Data Manager

Table Data Manager has several features to help you create, read, update, delete, tables and views within OneStream Software.

TABLE DATA MANAGER



Identifier	Description
Define	Select a database where your XFC table or XFC view will reside. You can define the metadata for an XFC table or XFC view from this button.
Schema	Select any table or view to see its metadata. For example, you can see the column name, data type, length, and other aspects of the table.
Upload	Select a database. Select the download file containing the metadata for your XFC table or XFC view. The file will be used to create a copy in the SQL Database and the Definitions grid.
Download	Select an XFC table or XFC View to download its metadata to a file. This file can be used during the upload process.
Data	Select any table or view to look at the data.
Import	Select an XFC table to import the data from the export file.
Export	Select an XFC table to export the selected data to a file.
Remove	Removes data from the selected XFC table.
Activity	Select database and click Activity to view Active and Blocked transactions.
Statistics	Select a database, table or view group or individual table or view and click Statistics to view the table and view record counts, or specific BI Blend table information.
Create	Select an XFC table or XFC view and click Create to add its definition into the database.
Alter	Select an XFC table or XFC view and click Alter to change its definition into the database.

Drop	Select an XFC table or XFC view and click Drop to remove its definition from the database.
Revive	Select an XFC table and click Revive to restore its definitions from the database.
Copy	Select any table and click Copy to create a mirrored XFC table including data records into table definitions and the database. XFC will be automatically appended as the table name prefix.

Defining a Table

The **Define** button allows you to construct a table using the options available in Table Data Manager. The screenshot below shows the steps that correspond to the **Defining a Table** procedure.

1. Select a database.
2. Click **Define**. The table definitions are displayed in the right column.
3. Click the **Plus** from the menu.
4. Enter a table name and a table description for the table you want to edit.

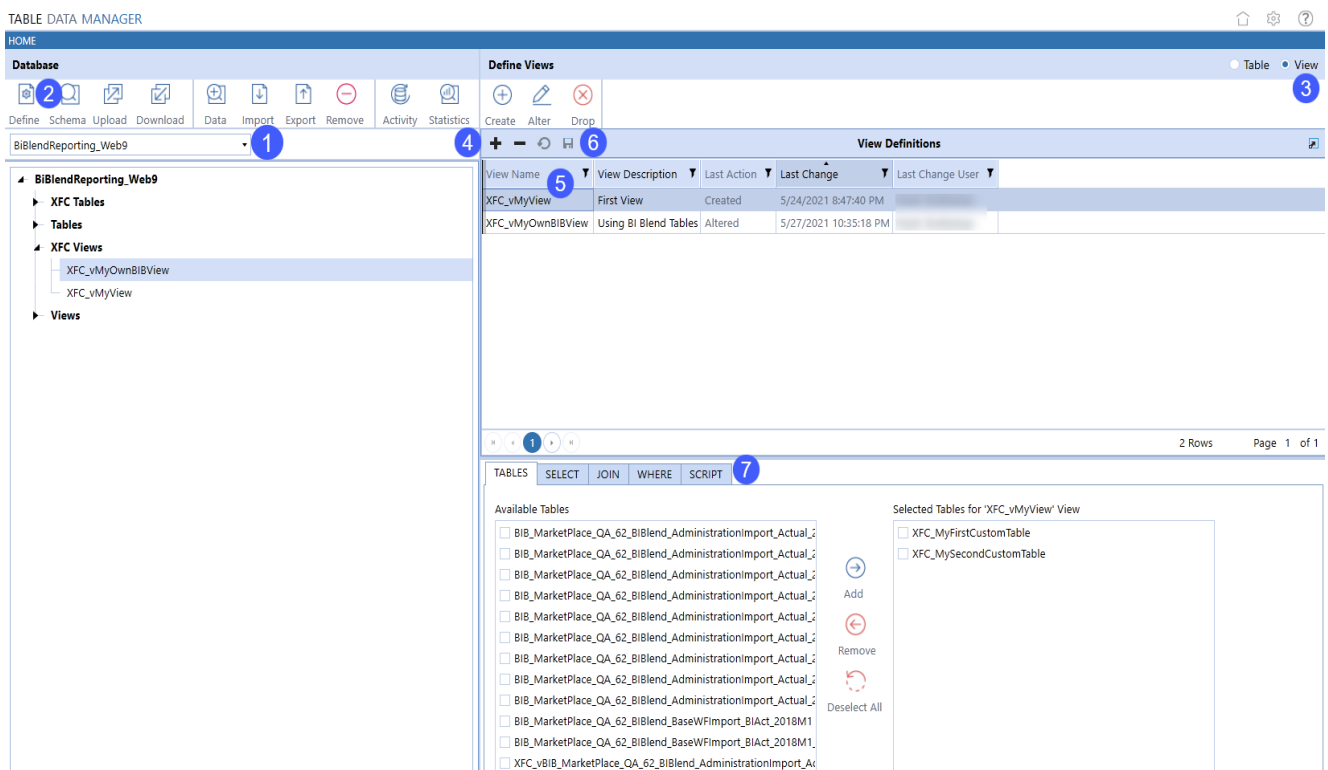
5. Click the **Save**.
6. Navigate to **Column Definitions** below **Table Definitions**.

Tables created within Table Data Manager have the prefix XFC. Table and column names can contain letters, numbers, and underline characters only.

Note: Column definitions support the **Int, Char, Varchar, Nvarchar, Bit, Bigint, Decimal, Date, Datetime, Time, and UniqueIdentifier** data types.

Defining a View

The **Define** button allows you to construct an XFC view using the options available in Table Data Manager. The screenshot below shows the steps that correspond to the **Defining a View** procedure.



1. Select a database.
2. Click **Define**.
3. Select the **View** radio button. The view definitions are displayed on the right side.
4. Click the **Plus** from the menu.
5. Enter a view name and a view description for the view you want to edit.
6. Click the **Save**.
7. Navigate to tabs below **View Definitions**.
8. Create and edit the definitions on each tab.

Views created in Table Data Manager have the prefix XFC.

Viewing a Schema

You can see the schema for any table or view to help understand how it is constructed.

TABLE DATA MANAGER

HOME

Database

Define Schema Upload Download Data Import Export Remove Activity Statistics

BiBlendReporting_Web9

BiBlendReporting_Web9

- XFC Tables
 - XFC_MyFirstCustomTable
 - XFC_MySecondCustomTable
 - XFC_vBIB_MarketPlace_QA_62_BIBlend_AdministrationImport_Actual_2018M1

Inspect Schema

Schema (XFC_vBIB_MarketPlace_QA_62_BIBlend_AdministrationImport_Actual_2018M1)

Drag a column header and drop it here to group by that column

Column Name	Data Type	Length	Scale	Precision
Rt	int		0	10
SourceID	nvarchar	250	0	0
Entity	nvarchar	250	0	0
EntityD	nvarchar	250	0	0
EntityND	nvarchar	250	0	0

1. Select a database.
2. Select a table or view from the database.
3. Click **Schema**.

You can inspect the schema from the right side.

Downloading a Schema

You can select an XFC table or view and download its schema to a file. This allows you to use files in the upload process.

The screenshot shows the Table Data Manager interface. The top navigation bar includes 'HOME', 'Database', and 'Inspect Schema'. The 'Database' section has a dropdown menu set to 'BiBlendReporting_Web9'. Below this is a tree view showing the database structure: 'BiBlendReporting_Web9' (expanded) contains 'XFC Tables' (expanded), 'Tables', 'XFC Views', and 'Views'. Under 'XFC Tables', 'XFC_MyFirstCustomTable' is selected. A blue arrow points to the 'Download' button in the top toolbar. Another blue arrow points to the 'XFC_MyFirstCustomTable' in the tree view. A notification dialog box titled 'Extensible Finance' is open, displaying the message: 'Table 'XFC_MyFirstCustomTable' downloaded to file in the folder 'Documents/Users/Administrator''. The dialog has an 'OK' button.

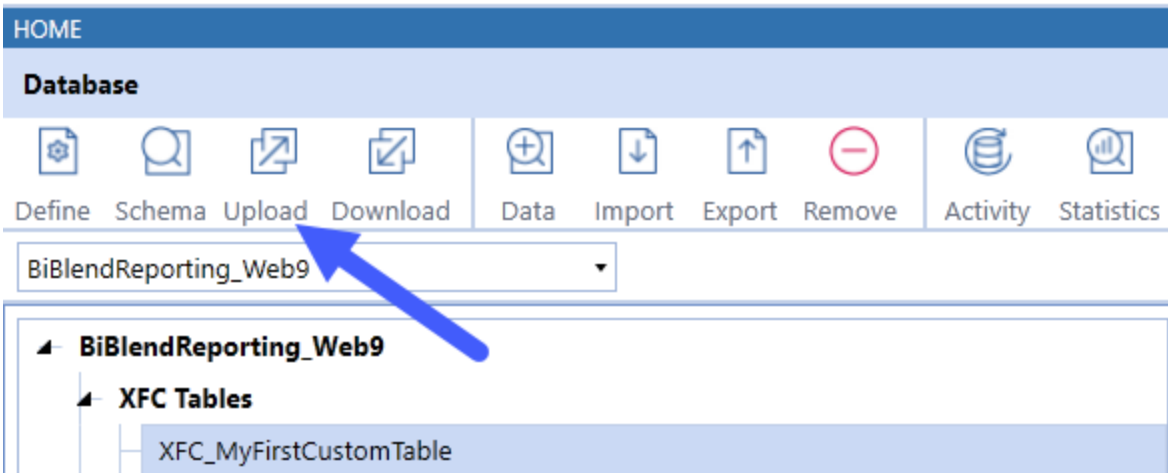
Column Name	Data Type	Length	Scale
MyFirstColumn	int		
MySecondColumn	varchar	MAX	

1. Select an XFC table or XFC view from the database.
2. Click **Download**. You will get a notification that the file has been created.

Uploading a Schema

You can upload a file containing metadata for an XFC table or view created from the download process.

TABLE DATA MANAGER



1. Click **Upload**. The File Explorer opens.
2. Select a file created during the download process.
3. Click **Open** to upload the file.

Inspecting Data

The **Data** button allows you to review some of the records and see what kind of data is coming back from the table or view. You can select between 10-5,000 records for a sampling of the data records.

Using Table Data Manager

TABLE DATA MANAGER

HOME

Database

Define Schema Upload Download Data Import Export Remove Activity Statistics

BiBlendReporting_Web9

BiBlendReporting_Web9

- XFC Tables
 - XFC_MyFirstCustomTable
 - XFC_MySecondCustomTable
 - XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1
- Tables
- XFC Views
 - XFC_vMyView
- Views

Inspect Data

Select Top Number of Records 10

Data (XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1)

Drag a column header and drop it here to group by that column

Rt	SourceID	Entity	EntityD	EntityND	EntityP	EntityL	EntityB	EntityS	Cons
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD
0	RevenueMgmt	Houston	Houston	Houston	Root	0	False	1	USD

1. Select a table or view from the database.
2. Click **Data**.
3. (Optional) Click an option (10, 100, 500, 1000, 5000) from **Select Top Number of Records** to expand the data shown.

Exporting Data

You can only export the data records from an XFC table.

TABLE DATA MANAGER

TABLE DATA MANAGER

HOME

Database

Define Schema Upload Download Data Import Export Remove Activity Statistics

BiBlendReporting_Web9

BiBlendReporting_Web9

- XFC Tables
 - XFC_BIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1_DimEt

1. Select an XFC table from the database.
2. Click **Export**. The export file will be placed into the user's folder.

Importing Data

You can import data records to an XFC table using the file created during the export process. The table chosen will need to be empty as the import process will not append or replace records. The table names will need to match.

The screenshot shows the 'TABLE DATA MANAGER' interface. At the top, there is a 'HOME' bar. Below it, the 'Database' section is active, displaying a toolbar with icons for Define, Schema, Upload, Download, Data, Import, Export, Remove, Activity, and Statistics. A dropdown menu shows 'BiBlendReporting_Web9'. Below this, a tree view shows the following structure:

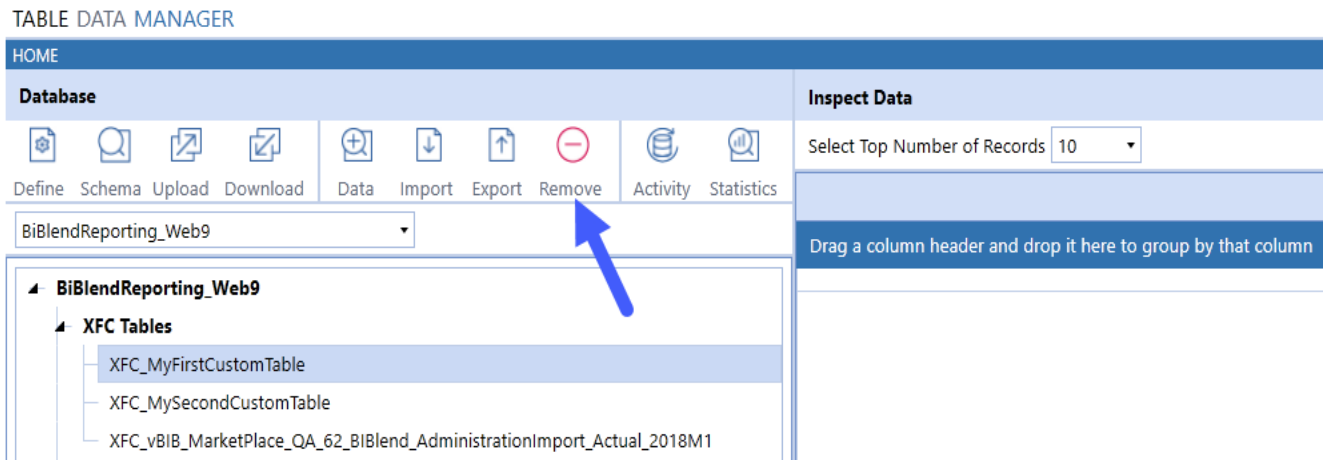
- BiBlendReporting_Web9
 - XFC Tables
 - XFC_MyFirstCustomTable
 - XFC_MySecondCustomTable
 - XFC_vBIB_MarketPlace_QA_62_BIBlend_AdministrationImport_Actual_2018M1

A blue arrow points to the 'XFC Tables' folder. To the right, the 'Inspect Data' section is visible, showing a dropdown for 'Select Top Number of Records' set to '10' and a blue instruction bar that says 'Drag a column header and drop it here to group by that column'.

1. Select an XFC table from the database.
2. Click **Import**. The file explorer opens.
3. Click **Open** to import the file into Table Data Manager.

Removing Data

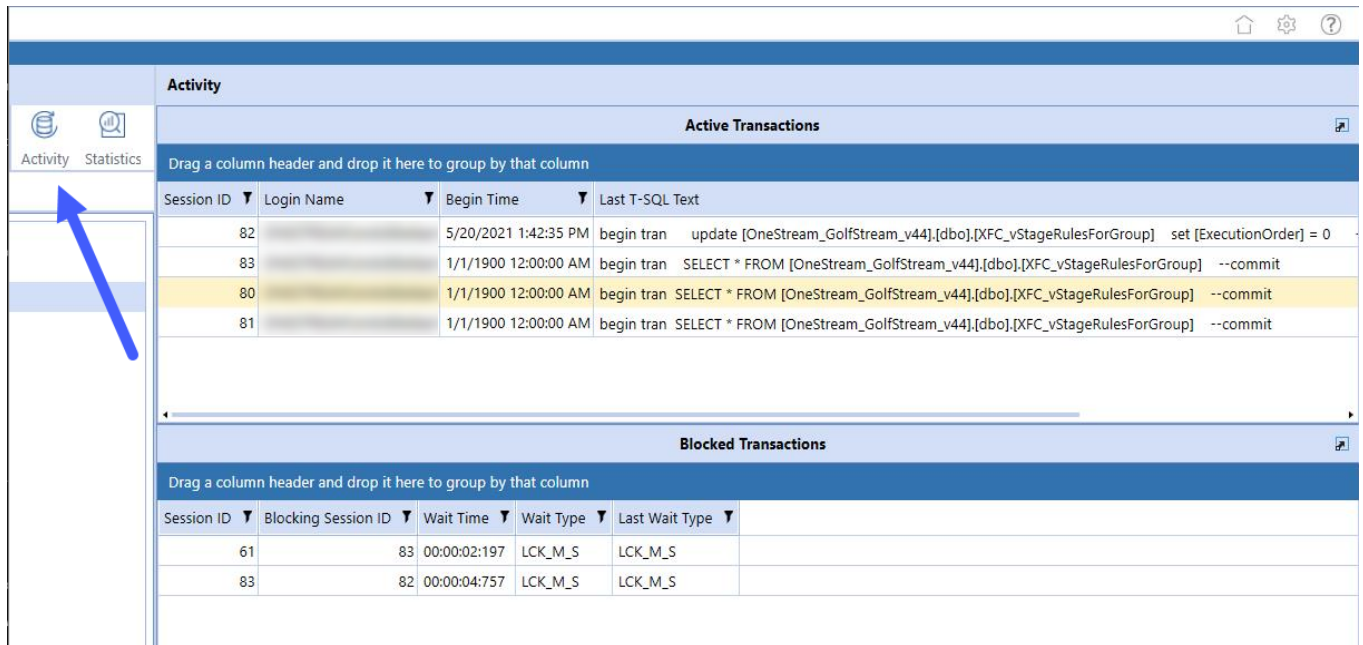
You can remove data records only from XFC tables.



1. Select an XFC table from the database.
2. Click **Remove**. A confirmation prompt opens.
3. Click **Continue** to remove all data.

Reviewing Activity

You can review active transactions occurring in the database. This can be helpful to view the other users within the database to see the current activity. Blocked transactions are transactions which cannot complete because another transaction is blocking it. Use the **Activity** button to troubleshoot this type of problem in your database.



The screenshot shows the SQL Server Enterprise Manager interface. On the left, the 'Activity' button is highlighted with a blue arrow. The main window displays the 'Activity' window, which is divided into two sections: 'Active Transactions' and 'Blocked Transactions'.

Active Transactions

Session ID	Login Name	Begin Time	Last T-SQL Text
82		5/20/2021 1:42:35 PM	begin tran update [OneStream_GolfStream_v44].[dbo].[XFC_vStageRulesForGroup] set [ExecutionOrder] = 0
83		1/1/1900 12:00:00 AM	begin tran SELECT * FROM [OneStream_GolfStream_v44].[dbo].[XFC_vStageRulesForGroup] --commit
80		1/1/1900 12:00:00 AM	begin tran SELECT * FROM [OneStream_GolfStream_v44].[dbo].[XFC_vStageRulesForGroup] --commit
81		1/1/1900 12:00:00 AM	begin tran SELECT * FROM [OneStream_GolfStream_v44].[dbo].[XFC_vStageRulesForGroup] --commit

Blocked Transactions

Session ID	Blocking Session ID	Wait Time	Wait Type	Last Wait Type
61	83	00:00:02:197	LCK_M_S	LCK_M_S
83	82	00:00:04:757	LCK_M_S	LCK_M_S

1. Select a database.
2. Click the **Activity** button.
3. Review the activity in the **Active Transactions** and **Blocked Transactions** window.
4. (Optional) Diagnose and resolve issues as needed.

Viewing Statistics

Statistics includes record counts for tables and views, plus BI Blend specific information.

Records

You can display the record count for all tables and views in a database, for a particular table type or view type, or individual table or view.

TABLE DATA MANAGER

HOME

Database

Define Schema Upload Download Data Import Export Remove Activity Statistics

BiBlendReporting_Web9

Records

Records BI Blend

Record Count

Drag a column header and drop it here to group by that column

Schema Name	Name
dbo	BIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1
dbo	BIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1_DimAc
dbo	BIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1_DimEt

BiBlendReporting_Web9

XFC Tables

- XFC_MyFirstCustomTable
- XFC_MySecondCustomTable
- XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1

1. Select a database, table type, view type, individual table, or individual view.
2. Click **Statistics**.
3. Click **Records**.

BI Blend

If you are working with a BI Blend database, you will see a BI Blend button. This gives you the same record count but also provides the processing information for **Live Parameters**, **WIP Parameters**, and **Processing Statistics**. This extra information is only available on a BI Blend database.

Viewing Statistics

The screenshot shows the TABLE DATA MANAGER interface. The 'Database' dropdown is set to 'BiBlendReporting_Web9'. The 'BI Blend' tab is active, and the 'Statistics' menu option is highlighted with a blue arrow. The 'Table Definitions' grid is visible, showing a table named 'XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1'.

1. Select a BI Blend database.
2. Click **Statistics**.
3. Click **BI Blend**.

Creating a Table or View

You can create an XFC table or an XFC view on the database.

The screenshot shows the TABLE DATA MANAGER interface. The 'Database' dropdown is set to 'BiBlendReporting_Web9'. The 'Define Tables' menu option is highlighted with a blue arrow. The 'Table Definitions' grid is visible, showing a table named 'XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1'.

1. Select a database.
2. Select **Define**.
3. Select the specific XFC table or XFC view from the respective **Table Definitions** grid.
4. Click **Create**.

Altering a Table or View

Alter promotes changes made to XFC tables or XFC views during the define process onto the database. The screenshot below shows the steps that correspond to the **Altering a Table or View** procedure.

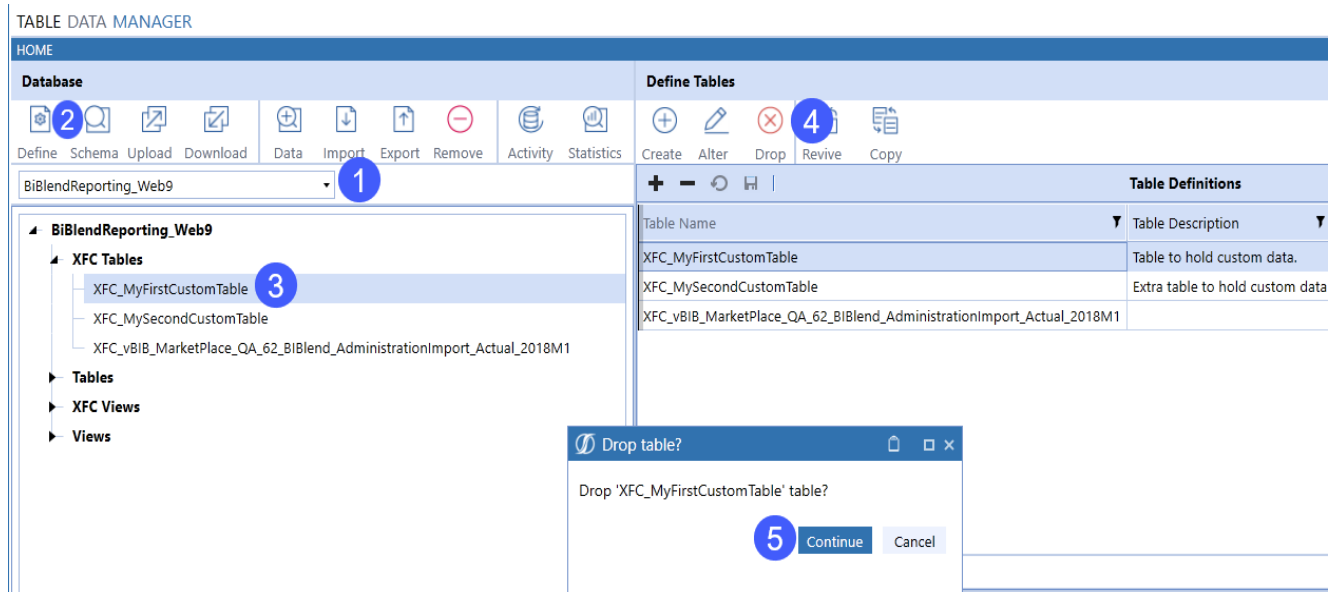
The screenshot shows the TABLE DATA MANAGER interface. The 'Database' section is set to 'BiBlendReporting_Web9'. The 'Define Tables' section is active, showing a list of tables. The table 'XFC_MyFirstCustomTable' is selected. The 'Alter' button is highlighted with a blue circle, indicating the step to alter the table.

Table Name	Table Description
XFC_MyFirstCustomTable	Table to hold custom data.
XFC_MySecondCustomTable	Extra table to hold custom data
XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1	

1. Select a database.
2. Select **Define**.
3. Make changes to the XFC table or XFC view.
4. Click **Save** to keep your changes.
5. Click **Alter** to promote saved changes to the database.

Dropping a Table or View

You can drop an XFC table or an XFC view from the database. Before dropping an XFC table make sure all records have been removed using the **Remove** button.



1. Select a database.
2. Select the **Define** button.
3. Select the XFC table or XFC view definition record.
4. Click **Drop**.
5. Click **Continue** on the prompt.

Reviving a Table

You can revive a table in Table Data Manager. This can be helpful if you lose track of changes during design and need to reset in order to see the original table definition. You will see the table in its original state in the designer.

TABLE DATA MANAGER

The screenshot shows the 'TABLE DATA MANAGER' interface. The 'Database' dropdown is set to 'BiBlendReporting_Web9'. The 'Define Tables' panel is active, showing a toolbar with buttons for Create, Alter, Drop, Revive, and Copy. A blue arrow points to the 'Revive' button. Below the toolbar, a list of table names is shown: 'XFC_MyFirstCustomTable' and 'XFC_MySecondCustomTable'.

1. Select a table from the database.
2. Click **Define**.
3. Click **Revive**. A prompt states that the table has been revived from the database.

Copying a Table

You can copy a table which was created using another database management tool into Table Data Manager. This is helpful for allowing custom tables be managed by Table Data Manager. Copying a table takes the schema and records from non-XFC table and copies them into an XFC table. The screenshot below shows the steps that correspond to the **Copying a Table** procedure.

The screenshot shows the 'TABLE DATA MANAGER' interface with the 'Table Definitions' table visible. The table has the following data:

Table Name	Table Description	Last Action	Last Change
XFC_MyFirstCustomTable	Table to hold custom data.	Created	5/24/2021 8:45:40 PM
XFC_MySecondCustomTable	Extra table to hold custom data	Created	5/24/2021 8:45:55 PM
XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1		Copied	5/25/2021 12:47:00 PM

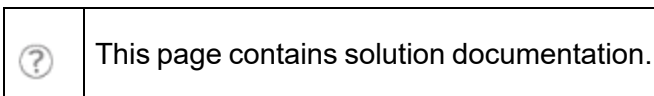
A 'Copy' dialog box is open, showing the prompt: 'Accept or change name to be used for new table.' The input field contains 'XFC_BIB_MarketPlace_QA_62_BiBlend_Administrat'. The dialog has 'Continue' and 'Cancel' buttons.

Numbered callouts in the screenshot indicate the following steps:

1. Select the table 'XFC_vBIB_MarketPlace_QA_62_BiBlend_AdministrationImport_Actual_2018M1' in the 'Table Definitions' table.
2. Click the 'Copy' button in the 'Define Tables' toolbar.
3. The 'Copy' dialog box appears.
4. The dialog box prompts for a name for the new table.
5. The name 'XFC_BIB_MarketPlace_QA_62_BiBlend_Administrat' is entered in the input field.
6. Click the 'Continue' button to complete the copy operation.

1. Select a database.
2. Click **Define**.
3. Select a non-XFC table to copy.
4. Click **Copy**.
5. (Optional) Rename the table. The "XFC" prefix will automatically be appended.
6. Click **Continue** on the **Copy** prompt.

Help and Miscellaneous Information



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.

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.