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Using Train Me (TRM)

This guide describes the necessary steps to setup and use the Train Me *(TRM)* Solution.

Train Me Solution Overview

The Train Me *(TRM)* Solution provides a method of distributing / viewing pre-recorded video training information by supplying a framework for hosting video content and sharing it with OneStream users within an organization.
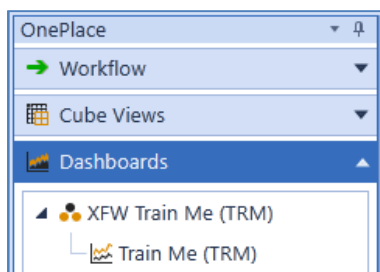
Train Me Setup

The Train Me Solution setup is broken into four main steps.
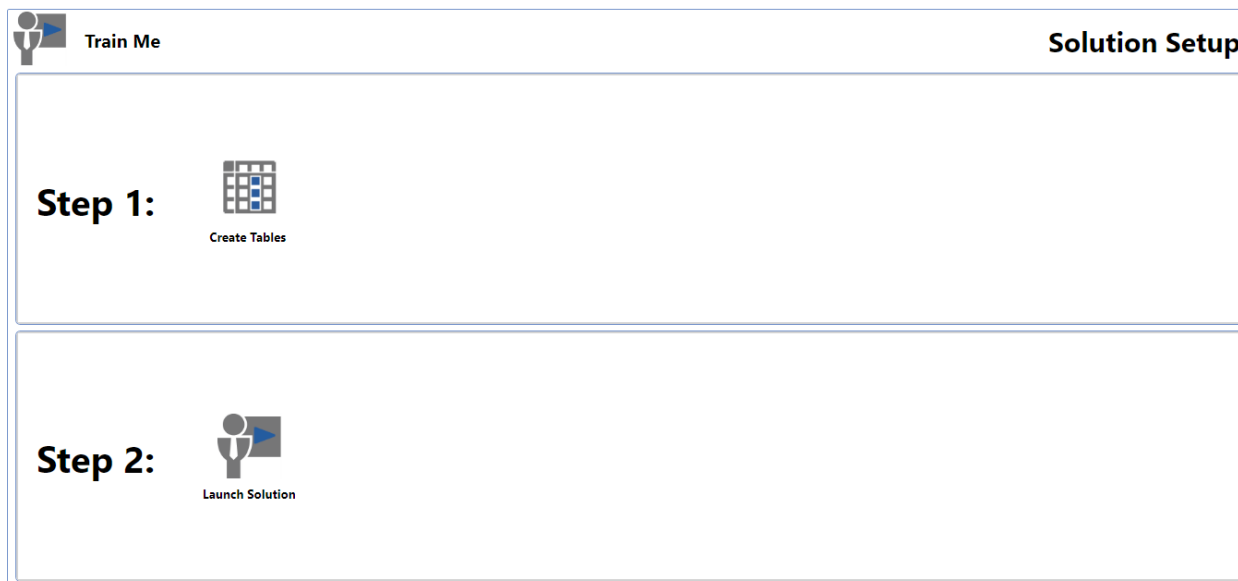
Import Train Me Package

The Train Me Package is a zip containing all of the Train Me Solution files and is located in the OneStream XF MarketPlace. To add the Train Me Solution, log into the correct application, navigate to the Application Load/Extract screen, and import the zip file.

Setup the Custom Tables Used in Train Me

Under OnePlace, select the Train Me Dashboard from the XFW Train Me Dashboard Profile.

The first time this solution is run, it will be directed to the Train Me Setup screen. The first step of the setup creates all of the tables required for the Train Me Solution. Once the setup is complete, the Train Me Viewer screen will open upon clicking the Train Me link.

Note: Prior to running the setup, ensure that the account being used to access SQL server has table creation rights on the SQL database in order to create the custom tables.

Additionally, the *Application Server Configuration*, located under *Database Server Connection,* must have the following settings updated:

- **Can Create Ancillary Table:** *True*
- **Can Edit Ancillary Table Data:** *True*
- **Table Creation Group for Ancillary Tables:**
  <OneStream Security Group running application setup>
  The default for this is set to *Administrator*
- **Maintenance Group for Ancillary Tables:**
  <OneStream Security Group maintaining the application>
  The default for this is set to *Administrator*

For more details on these settings, see the *OneStream XF Installation and Configuration Guide.*
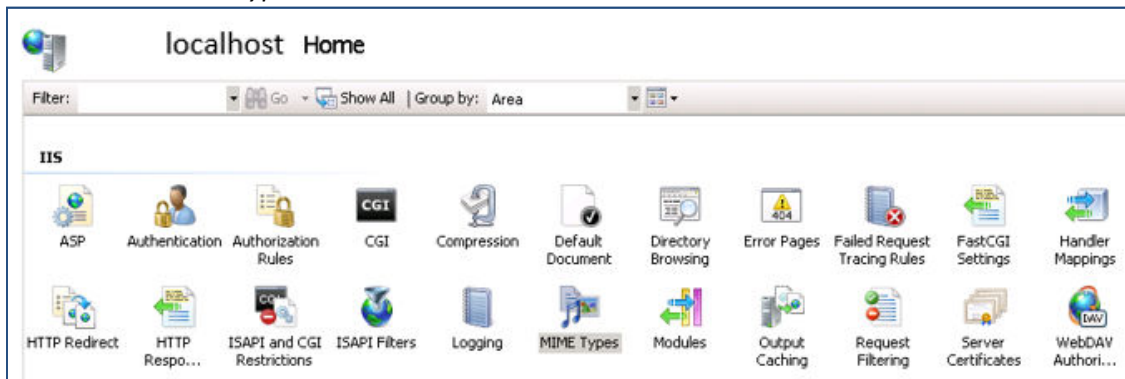
Configure the Web Server

For most file types, IIS needs to be updated to associate the file extension in order for the Web Server to play video content.
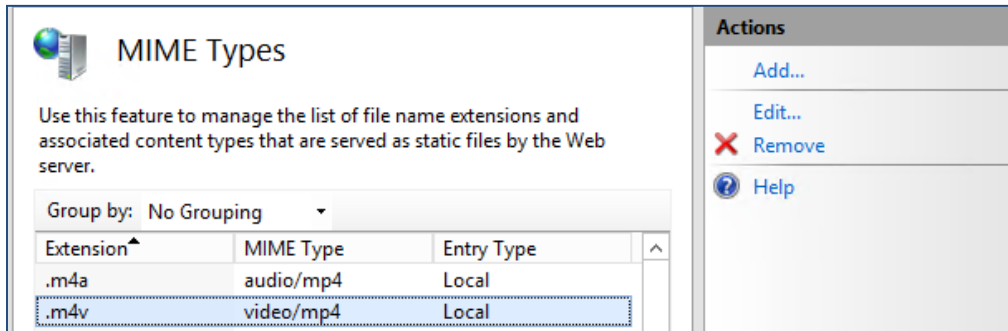
IIS Setting Changes

If IIS 7 does not recognize the file name extension requested by the client, IIS 7 sends the content as the default MIME type which is Application. This MIME type signifies that the file contains application data, and usually means that clients cannot process the file. This is done by adding a MIME type to IIS.

1.) Open IIS Manager and navigate to the correct level to manage
    For information about opening IIS Manager, see Open IIS Manager (IIS 7)
    For information about navigating to locations in the UI, see Navigation in IIS Manager (IIS 7)
2.) Double-click *MIME Types*

3.) In the *Actions* pane, click *Add*

4.) In the *Add MIME Type* dialog box, type a file name extension in the *File Name Extension* text box. Ex: *xyz.*
5.) Type a MIME type in the *MIME Type* text box.
Ex: *application/octet-stream*
6.) Click *OK*

Train Me Content Setup

Under OnePlace, select the Train Me Admin Dashboard from the XFW Train Me Dashboard Profile.

Create Video Categories

Click from the Video Categories Tab in order to add new content categories.

Fill out the properties about each category:

Name
Unique identifier used internally

Description
Information that displays in the left frame in Guided Reporting

Order
Display order for the Video Categories on the Train Me Solution screen

Copy Video Content to the Web Server

In order for the video content to be hosted to users, the video files should be copied to the Web Server which allows streaming of files without having to load them from a remote file share first.

File path

C:\Program Files\OneStream Software\OneStreamWebRoot\OneStreamWeb\Pages\

All video content presented in the Train Me Solution should be copied to this folder or subfolders within this folder. Video content can be organized into sub folders within this path as desired. Simply ensure that the Video File URL is pointing to the appropriate path during the video list setup.

Create Video List

Once the video content has been loaded onto the Web Server, the next step is to show the video list to the users.

Category	Video Name	Description	Created By	Version	Video File URL	Order
Dashboards	OverviewDashboards	Dashboards Overview	Eric	1.0	http://onestreamfishmarket:50001/OneStreamWeb/Pages/TrainMeVideos/Dashboards/OverviewDashboards.mp4	10
Other	OneStreamNavigation	Naviagating in OneStream XF	Eric	1.0	http://onestreamfishmarket:50001/OneStreamWeb/Pages/TrainMeVideos/General/OneStreamNavigation.mp4	25

Fill out the properties about each category:

Category
Select a category type from the drop down list

Video Name
Name of the content being shown to the user

Note: This does not need to match the actual file name of the video content

Description
Details of the video content being shown to the user

Created By
Information on who created the video content

Version
Version of the video

Video File URL
URL to launch the video file
The URL must begin with http://<FullyQualifiedWebServerName>:50001/OneStreamWeb/Pages in order for the video to launch correctly.

 Ex: http://localhost.onestream.com:50001/OneStreamWeb/Pages/OverviewWorkspaces.mp4
http://localhost.onestream.com:50001/OneStreamWeb/Pages/TrainMe/Dashboards/Dashboards1.mp4

Note: The web server name must be fully qualified for the videos to launch correctly for all users.

Order
Display order for the Video Categories on the Train Me Solution screen

Add Workflow Videos

Once Workflow video content has been created and uploaded to the Web Server, it can be added to the Workflow Video setup screen.

Video Categories	Video List	Workflow Videos			
+ − ↻ 💾			Workflow Videos		
Workflow ID ▼	Description ▼	Video File URL ▼	Created By ▼	Order ▼
Import	Import	http://onestreamfishmarket:50001/OneStreamWeb/Pages/TrainMeVideos/Dashboards/Over	Shawn	0
Validate	Validate	http://onestreamfishmarket:50001/OneStreamWeb/Pages/TrainMeVideos/Dashboards/Over	Shawn	10
Process	Process	http://onestreamfishmarket:50001/OneStreamWeb/Pages/TrainMeVideos/Dashboards/Over	Shawn	20

Workflow ID

The Workflow ID is a string used to link the video to a specific Workflow Dashboard. The string entered in this field must match the value in the Workflows defined on the Global Options screen
(Workflow 1 Subject – Workflow 6 Subject)
Any string can be entered here as long as it matches the values in the Parameters

Description

Details of the video content being shown to the user

Video File URL

URL to launch the video file
The URL must begin with http://<WebServerName>:50001/OneStreamWeb/Pages in order for the video to launch correctly.

Ex: http://localhost:50001/OneStreamWeb/Pages/TrainMe/Workflow/Workspaces.mp4
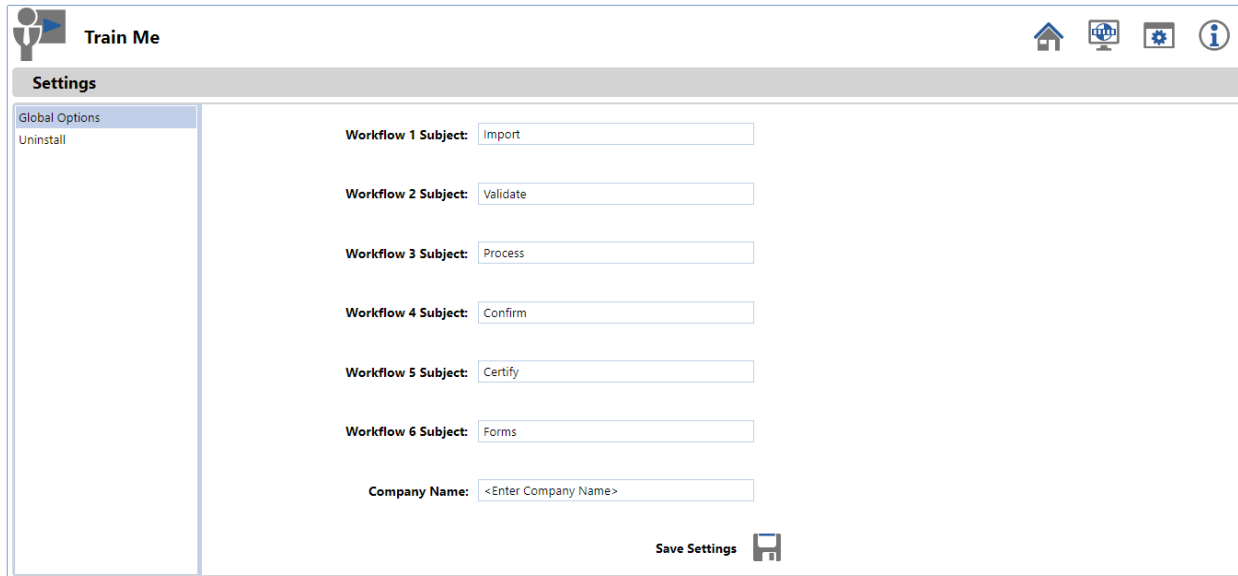
Created By

Information on who created the video content

Order

Display order for the Video Categories on the Train Me setup screen

Assign Workflow Videos to a Dashboard

After adding Workflow video content from the Admin screen, the next step is linking the videos to the individual Dashboards. Navigate to the Setting Screen ⚙ and update the *text value* for each of the Workflow Subject Parameters 1-6 with the value from the *Workflow ID* field created in the last step.

Assign Workflow Videos to Workflow Profiles

Once the Workflow videos are linked to a Dashboard, assign them to the desired Workflow Profiles.

Solution Database Migration Advice

A Development OneStream XF 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 process below will help migrate the solution tables properly:

1. In the Production OneStream XF application, install the solution and create the data tables. See the chapter on *Setup* for Database Server Connection settings and installation details.
2. Data tables were created in the OneStream XF Development Application during the solution installation. Copy the data from the tables to the Production Microsoft SQL Server Database using the Microsoft SQL Migration Utility. This utility should only be run by the Microsoft SQL Administrator.

   The Microsoft SQL Migration Utility and instructions on its use can be downloaded online from: https://sqlazuremw.codeplex.com

   Note: This process has the potential to overwrite existing table data in the Production Application database if data already exists.

Modifying MarketPlace Solutions

A few cautions and disclaimers when modifying a MarketPlace Solution:

- 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.