



# Administrator Solution Tools Guide

PV7.4.0 SV101

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# Overview

Administrator Solution Tools provides a single dashboard to access multiple solutions, each enabling OneStream administrators to perform their role effectively and efficiently. An overview of each solution within Administrator Solution Tools is described below.

## Business Rule Viewer

Allows Administrators to view current and historical business rules and member formulas. It also provides a historical audit trail of all rules that have been added, edited or deleted.

## Member Formula Builder

The Member Formula Builder lets you create and maintain dynamic and stored calculations with step-by-step directions in a user-friendly interface that allows the user to avoid writing code. It also provides the ability to see all formulas for a member in one place, including the scenario and time-varying formulas.

## Home Page Manager

Administrators can easily assign a default Home Page to a user or user group to display when logging into OneStream.

## Log Cleaner

Provides administrators with a simple interface to manage log files by allowing them to delete any log type (Error, Logon or TaskLogs) in increments of 30 days up to 810 days.

# 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: [OneStream Solution Modification Considerations](#)

## Dependencies

| Component                | Description  |
|--------------------------|--|
| OneStream 7.4.0 or later | Minimum OneStream Platform version required to install this version of Administrator Solution Tools. |

## Select the Administrator Solution Tools

### Development Location

Before beginning installation, decide whether to build Administrator Solution Tools 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 Administrator Solution Tools 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 Administrator Solution Tools 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 Administrator Solution Tools.

# Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to Administrator Solution Tools such as workflow profiles and entities are in the production application.
2. Copy your production OneStream application to your Development environment and rename it. This development version is used for your Administrator Solution Tools 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 OneStream Solutions (such as Specialty Planning) are already in the application, these adjustments may already exist.

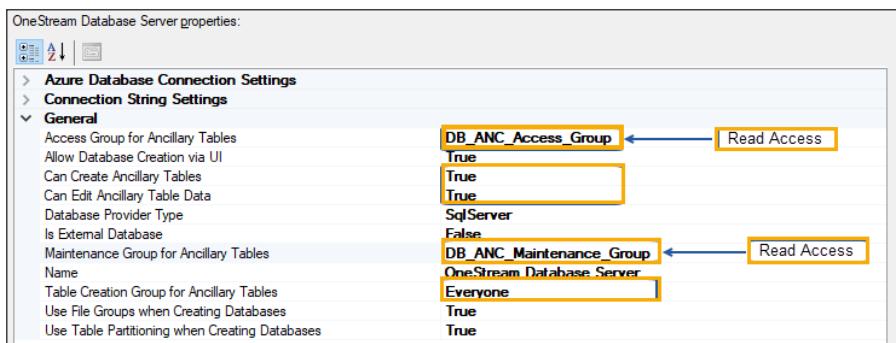
**See also:** [Solution Database Migration Advice](#)

# Configure the OneStream Application Server

Ensure that the security group settings include the users who will be working on and setting up Administrator Solution Tools before proceeding.

**NOTE:** Group settings are applicable to all OneStream Solutions, so 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 Administrator Solution Tools

1. In the OneStream Solution Exchange, go to OneStream Solutions and select the **Administrator Solution Tools** tile.

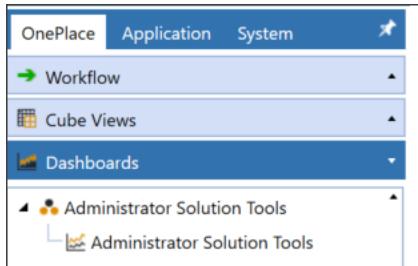


2. On the Administrator Solution Tools Solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and then click **Download**.
4. Log in to OneStream.
5. On the **Application**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

The first time you run Administrator Solution Tools, a guided table setup process begins.

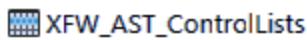
In OneStream, click **Community Solution > Dashboards > Administrator Solution Tools > Administrator Solution Tools**.



## Create Tables

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

This step may be necessary when upgrading even if tables are already present. Administrator Solution Tools will not drop any tables that already exist but will modify table structures and add any new ones if necessary.



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

## Package Contents

The Dashboard Maintenance Unit provides the user interface for Administrator Solution Tools and includes the required dashboard groups, components, data adapters, parameters and files.

### **XFW Administrator Solution Tools**

This is the Dashboard Maintenance Unit that provides the user interface for the Administrator Solution Tools solution. It includes the Dashboard Groups, Components, Data Adapters, Parameters, and Files used to build the solution.

# Business Rules

The following business rules are included:

### **AST\_ClearLogsForThreshold**

This is an extensibility business rule for the Log Cleaner. This rule provides low impact of clearing functions for all three major log types (Combined Error, User Logon, and Task Activity) within OneStream.

### **AST\_HelperQueries**

This is a Dashboard Data Set business rule. This rule can look up lists of user groups and dashboards.

### **AST\_ParamHelper**

This is a conditional parameter helper functions Dashboard 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.

### **AST\_SolutionHelper**

This is a Dashboard Extender business rule that provides various helper functions for the Administrator Solution Tools solution.

### **AST\_SolutionHelperBRV**

Contains all code logic and change events for the Business Rule Viewer and Member Formula Viewer.

### **AST\_SolutionHelperCommon**

Contains common code shared by all business rules, such as working with session state and sorting functions.

### **AST\_SolutionHelperHOM**

Contains all code logic and change events for the Home Page Manager.

### **AST\_SolutionHelperLCR**

## **Setup and Installation**

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Contains all code logic and change events for the Log Cleaner, including functions that generate log analysis charts.

### **AST\_SolutionHelperMFB**

Contains all code logic and change events for the Member Formula Builder.

# Settings

- The **Settings** page contains the **Global Options** tab where you define options for administration, member formulas and uninstalling.

Only an Administrator Solutions Tools Administrator can access the Settings page.

Configure the Administrator in Global Options, mentioned in this section and can see and make changes to any Settings page and any solution configuration. They are referenced in this document as “AST Solution Admin.”

## Global Options

The **Global Options** page contains key properties that guide global Administrator Solution Tools administration. Use this page to start configuring Administrator Solution Tools.

Only an Administrator Solution Tools administrator can access the Administrator Solution Tools Settings page. Set the Administrator in **Global Options**. The Administrator can see and make changes to any Settings page and any solution configuration.

**NOTE:** Global option settings are retained during upgrades.

## Settings

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The screenshot shows the 'ADMINISTRATOR SOLUTION TOOLS' interface under the 'SETTINGS' tab. The 'Global Options' section includes 'Uninstall' and 'Security Roles'. The 'Security Roles' section contains dropdown menus for 'Manage Administrator Solution Tools' (set to 'Administrators'), 'Access Administrator Solution Tools' (set to 'Everyone'), 'Access Home Page Manager' (set to 'Administrators'), 'Access Business Rule Viewer' (set to 'Administrators'), 'Access Log Cleaner' (set to 'Administrators'), and 'Access Member Formula Builder' (set to 'Administrators'). Below these is a 'Member Formula Builder Settings' section with a 'Preview Non-MFB Formulas' checkbox and a 'Save' button.

**NOTE:** These same rights apply to any OneStream System Administrator, referred to in this document as the “OneStream Admin.” See the *Design and Reference Guide* section on Security for more information.

## Security Roles

Since security is governed at the global level, it is the assignment of the user group to the Security Role that determines who will be Administrator Solution Tools Administrators globally.

This tool kit is designed with administrators in mind. The default setting for all solutions is the standard Administrators User Group, but this can be changed. Anyone in the Administrators User Group is a System Administrator and, by default, can perform any of

the same duties as any of the individual solution admins. Therefore, System Administrators can always see and access all solutions within Administrator Solution Tools.

### **Manage Administrator Solution Tools**

Anyone assigned to this User Group is considered a super-user who can configure any aspect of Administrator Solution Tools and are referred to as the Solution Administrator. This user will have access to the Settings page to manage security set up for all tools within Administrator Solution Tools. This user will not have access to any of the individual solutions unless they are part of that solution's access group.

**Example:** The Administrator Solution Tools administrator may have access to **Manage Administrator Solution Tools** however they do not have access to **Access Home Page Manager**. This was done to allow Administrators to hide unwanted solutions from their Administrator Solution Tools Home Page. If allowing Administrator access to all Administrator Solution Tools is desired, create an Administrator Solution Tool Administrator security group located in **System > Security > System Security Roles**, and add each solution's security access to the Group Membership.

### **Access Administrator Solution Tools**

This group can access the **Administrator Solution Tools** Home page. This security group supersedes any of the ensuing security groups. Therefore, any user who needs to access individual solutions within AST and is part of one, or many, of the groups below, must also be included in this security group first to gain access.

### **Access Home Page Manager**

This group can access the Home Page Manager solution and assign home pages to users. The Administrator role is required to access and use the Home Page Manager solution. This includes any user included in the Administrators User Group.

### **Access Business Rule Viewer**

## Settings

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This group can access the Business Rule Viewer and can view Business Rules or Member Formulas. The Administrator role is required to access and use the Business Rule Viewer. The Administrator role includes any user included in the Administrators User Group.

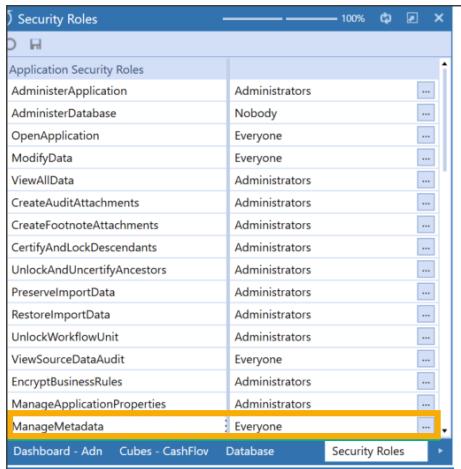
### Access Log Cleaner

This group can access the Log Cleaner solution and execute the clear logs process.

### Access Member Formula Builder

This group can access the Member Formula Builder.

Creating formulas is a metadata change. Inherently, belonging to this access group does not inherently allow users to change metadata, such as the Formula property on an Account. Users in this group must also be included in the **ManageMetadata** security role, found under **Application> Security Roles**. Giving access to manage metadata has other system implications. Therefore it is recommended to limit the number of uses within this access group:



If this User Group is not included in the group for **ManageMetadata**, select the dimension in Dimension Library where edits are desired, select the **Dimension Properties** tab and

## Settings

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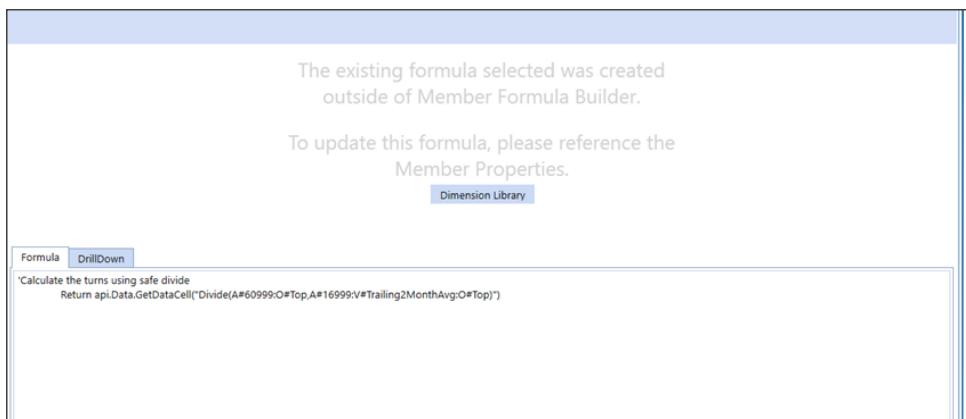
ensure that this group is included in the **Maintenance Group** for that individual dimension.

# Member Formula Builder Settings

## Preview Non-Member Formula Builder Formula

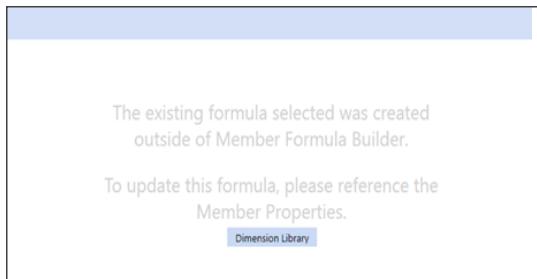
The **Preview Non- Member Formula Builder Formula** check box is enabled by default, allowing a user to see the formula and drill down tabs that indicate a member formula was created outside of Member Formula Builder.

**NOTE:** This interface is read-only. You can enter data on the page, but it is not save. Edit formulas in the Dimension Library.



**See also:** The *Member Formulas* section in the *Foundation Guides* chapter of the *Design and Reference Guide*.

If the **Preview Non-Member Formula Builder Formulas** check box in the Administrator Solution Tools Global Settings is cleared, the formula and drill-down tabs do not display. Edit formulas in the Dimension Library.



# Uninstall

The Uninstall feature allows the Administrator Solution Tools User Interface or the entire solution to be uninstalled. Note that if part of an upgrade, any modifications performed on standard Administrator Solution Tools objects will be removed. There are two Uninstall options:

- **Uninstall UI** removes Administrator Solution Tools, including related dashboards and business rules but leaves the database and related tables in place. For some releases, this step should be performed before accepting any new version of Administrator Solution Tools since some of the Dashboards or other objects may have been modified.

Choose this option to update without removing the data tables. Check the Release Notes to see if an overinstall is supported.

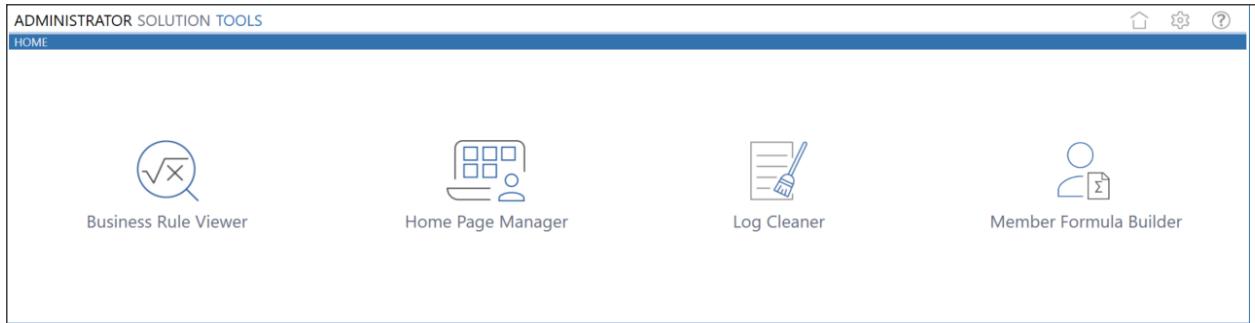
- **Uninstall Full** removes all the related data tables, all data, Administrator Solution Tools Dashboards, and Business Rules.

Choose this option to remove Administrator Solution Tools or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

**CAUTION:** Uninstall procedures are irreversible

# Administrator Solution Tools Dashboard

Access the Administrator Solution Tools dashboard by clicking **Community Solution > Dashboards > Administrator Solution Tools**. Starting Administrator Solution Tools opens the Home page. The icons that display are based on security roles specified in **Global Options**. Use this page to use the Administrator Solution tools that you have permission to access. To return to the Home page, select the **Show Home Page** icon in the top toolbar.



# View Business Rules and Member Formulas



The Business Rule Viewer lets you view any business rule or member formula created in OneStream. To launch the Business Rule Viewer, click the Business Rule Viewer icon on the Administrator Solution Tools Home page.

## Business Rules

A business rule is a VB.Net class that performs a function or set of functions in OneStream. Each business rule is an independent object encapsulating VB.Net code. Business rules are created using the Business Rule Editor in Application Tools. Any business rule created in OneStream can be viewed in the Business Rule Viewer.

### See also:

- The *Business Rules* section in the *Foundation Guides* chapter of the *Design and Reference Guide* for information on business rule fundamentals, organization, framework, and other details.
- The *Business Rules* section in the *Application Tools* chapter of the *Design and Reference Guide* for details on using OneStream to design Business Rules.
- The *OneStream API Overview Guide*, *OneStream API Details*, and database documentation from OneStream Solution for business rule engine details.

## Member Formulas

A member formula is assigned to a dimension members and runs in the Finance Engine during cube processing.

Member formulas are created directly on a member in the Dimension Library or with the Administration Solution Tools Member Formula Builder. Member formulas created in the Formula Editor in the Dimension Library must be edited in the Dimension Library.

**See also:**

- [Build Simple Member Formulas in OneStream](#)
- The *Member Formulas* section of the *Foundation Guides* chapter of the *Design and Reference Guide* for information on Member Formula fundamentals and using OneStream to design Member Formulas.

## Select a Business Rule or Member Formula to View

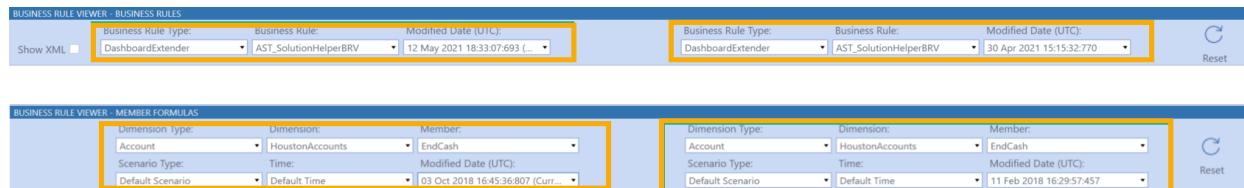
The Business Rule Viewer lets you view business rules or member formulas side-by-side. It's most useful for viewing two versions of the same business rule, member formula, or similar rules or formulas.

Use the drop-down lists in the Business Rule Viewer's Business Rules and Member Formulas pages to select the rules or formulas to view. The drop-downs lists are filters to help organize and quickly search. Selecting a value in a drop-down list filter determines the available values in the next drop-down list. For example, if you are searching for a member formula to view and select **Flow** as the dimension type, only the dimensions belonging to Flow display in the Dimensions drop-down lists.

## View Business Rules and Member Formulas

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The following shows the Business Rule Viewer drop-down list boxes for business rules and member formulas.



The left and right areas are connected, so when you select a value on the left, the Business Rule Viewer automatically populates the same field on the right with the same value.

**See also:** [Connected and Disconnected Viewing Panes](#) for more information on how the viewing area works.

When you select a value for **Modified Date (UTC)** on the left, the Business Rule Viewer displays the rule or formula you want to view in the left textbox. It also selects and displays the next most recent version (if one exists) in the right text box. If the next most recent version of the rule or formula shows as deleted, the next most recent version displays on the right. The Business Rule Viewer assumes that you want to view a selected rule's most recent version and the next most recent version in the side-by-side viewing areas.

**NOTE:** If a business rule or member formula does not have an earlier version, **No previous business rule to display** is displayed in the viewing area.

## Connected and Disconnected Viewing Panes

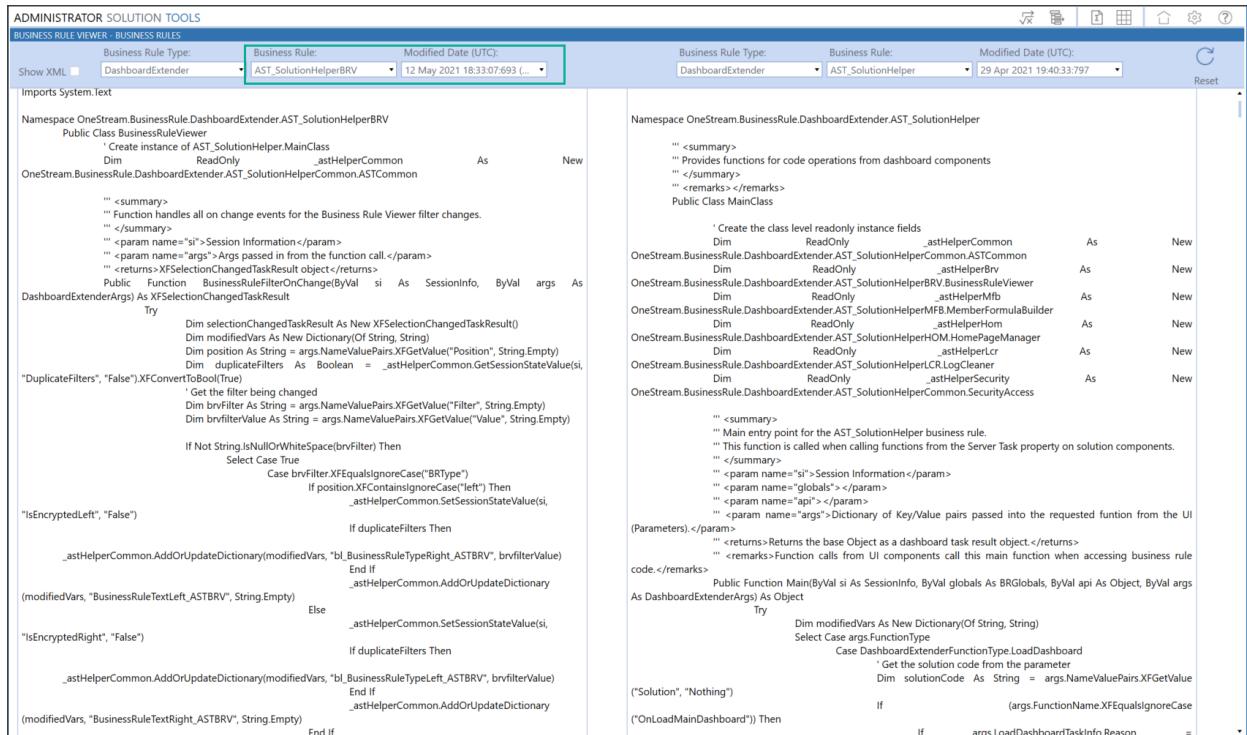
When you select a business rule or formula to view, the left side shows the selected version and the right side shows the next most recent version. The views are connected, so the left and right side scroll together.

## View Business Rules and Member Formulas

If you change a drop-down list value on either side, the sides are no longer connected and work independently. When the left and right sides are disconnected, you can use the filters independently to view different business rules or member formulas.

**NOTE:** The sides scroll together even when viewing different business rules or formulas.

The following image shows different business rules displayed in the left and right views of the Business Rule Viewer.



The screenshot shows the Business Rule Viewer interface with two separate views. The left view displays the code for the `AST_SolutionHelperBRV` business rule, and the right view displays the code for the `AST_SolutionHelper` business rule. Both views show the same basic structure of a class definition with methods and properties, indicating they are independent of each other.

```
ADMINISTRATOR SOLUTION TOOLS
BUSINESS RULE VIEWER - BUSINESS RULES
Business Rule Type: Business Rule: Modified Date (UTC):
Show XML: DashboardExtender AST_SolutionHelperBRV 12 May 2021 18:33:07.693 ...
Business Rule Type: Business Rule: Modified Date (UTC):
Show XML: DashboardExtender AST_SolutionHelper 29 Apr 2021 19:40:33.797 ...
Reset
```

```
Imports System.Text
Namespace OneStream.BusinessRule
    Public Class BusinessRuleViewer
        ' Create instance of AST_SolutionHelper MainClass
        Dim _astHelperCommon As New AST_SolutionHelperCommon
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperCommon.ASTCommon
    
```

```
    ''' <summary>
    ''' Function handles all on change events for the Business Rule Viewer filter changes.
    ''' </summary>
    ''' <param name="si">Session Information</param>
    ''' <param name="args">Args passed in from the function call</param>
    ''' <returns>XSelectionChangedTaskResult object</returns>
    Public Function BusinessRuleFilterOnChange(ByVal si As SessionInfo, ByVal args As DashboardExtenderArgs) As XSelectionChangedTaskResult
        Try
            Dim selectionChangedTaskResult As New XSelectionChangedTaskResult()
            Dim modifiedVars As New Dictionary(Of String, String)
            Dim position As String = args.NameValuePairs.XFGetValue("Position", String.Empty)
            Dim duplicateFilters As Boolean = _astHelperCommon.GetSessionStateValue(si, "DuplicateFilters", "False").XFConvert.ToBoolean(True)
            ' Get the filter being changed
            Dim brvFilter As String = args.NameValuePairs.XFGetValue("Filter", String.Empty)
            Dim brvFilterValue As String = args.NameValuePairs.XFGetValue("Value", String.Empty)

            If Not String.IsNullOrEmpty(brvFilter) Then
                Select Case True
                    Case brvFilter.XFEqualsIgnoreCase("BRType")
                        If position.XFContainsIgnoreCase("left") Then
                            _astHelperCommon.SetSessionStateValue(si, "IsEncryptedLeft", "False")
                        End If
                        If duplicateFilters Then
                            _astHelperCommon.AddOrUpdateDictionary(modifiedVars, "bl_BusinessRuleTypeRight_ASTBRV", brvFilterValue)
                        End If
                    End If
                    Else
                        _astHelperCommon.SetSessionStateValue(si, "IsEncryptedRight", "False")
                        If duplicateFilters Then
                            _astHelperCommon.AddOrUpdateDictionary(modifiedVars, "bl_BusinessRuleTypeLeft_ASTBRV", brvFilterValue)
                        End If
                    End If
                End If
            End If
        End Try
    End Function

```

```
Namespace OneStream.BusinessRule.DashboardExtender.AST_SolutionHelper
    ''' <summary>
    ''' Provides functions for code operations from dashboard components
    ''' </summary>
    ''' <remarks></remarks>
    Public Class MainClass
        ' Create the class level readonly instance fields
        Dim _astHelperCommon As New AST_SolutionHelperCommon
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperCommon.ASTCommon
        Dim _astHelperBrv As New AST_SolutionHelperBRV
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperBRV.BusinessRuleViewer
        Dim _astHelperMfb As New AST_SolutionHelperMFB
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperMFB.MemberFormulaBuilder
        Dim _astHelperHom As New AST_SolutionHelperHOM
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperHOM.HomePageManager
        Dim _astHelperLcr As New AST_SolutionHelperLCR
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperLCR.LogCleaner
        Dim _astHelperSecurity As New AST_SolutionHelperSecurity
        As New
OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperCommon.SecurityAccess
    
```

```
    ''' <summary>
    ''' Main entry point for the AST_SolutionHelper business rule.
    ''' This function is called when calling functions from the Server Task property on solution components.
    ''' </summary>
    ''' <param name="si">Session Information</param>
    ''' <param name="globals"></param>
    ''' <param name="api"></param>
    ''' <param name="args">Dictionary of Key/Value pairs passed into the requested function from the UI (Parameters).</param>
    ''' <returns>Returns the base Object as a dashboard task result object.</returns>
    ''' <remarks>Function calls from UI components call this main function when accessing business rule code.</remarks>
    Public Function Main(ByVal si As SessionInfo, ByVal globals As BRGlobals, ByVal api As Object, ByVal args As DashboardExtenderArgs) As Object
        Try
            Dim modifiedVars As New Dictionary(Of String, String)
            Select Case args.FunctionType
                Case DashboardExtenderFunctionType.LoadDashboard
                    ' Get the solution code from the parameter
                    Dim solutionCode As String = args.NameValuePairs.XFGetValue("Solution", "Nothing")
                    If solutionCode = "OnLoadMainDashboard" Then
                        If args.LoadDashboardTaskInfo Reason = "
```

Click **Reset Filters** to reconnect the left and right views. This clears the drop-down filters on both sides, initiating the connection of the left and right views.



## View a Business Rule

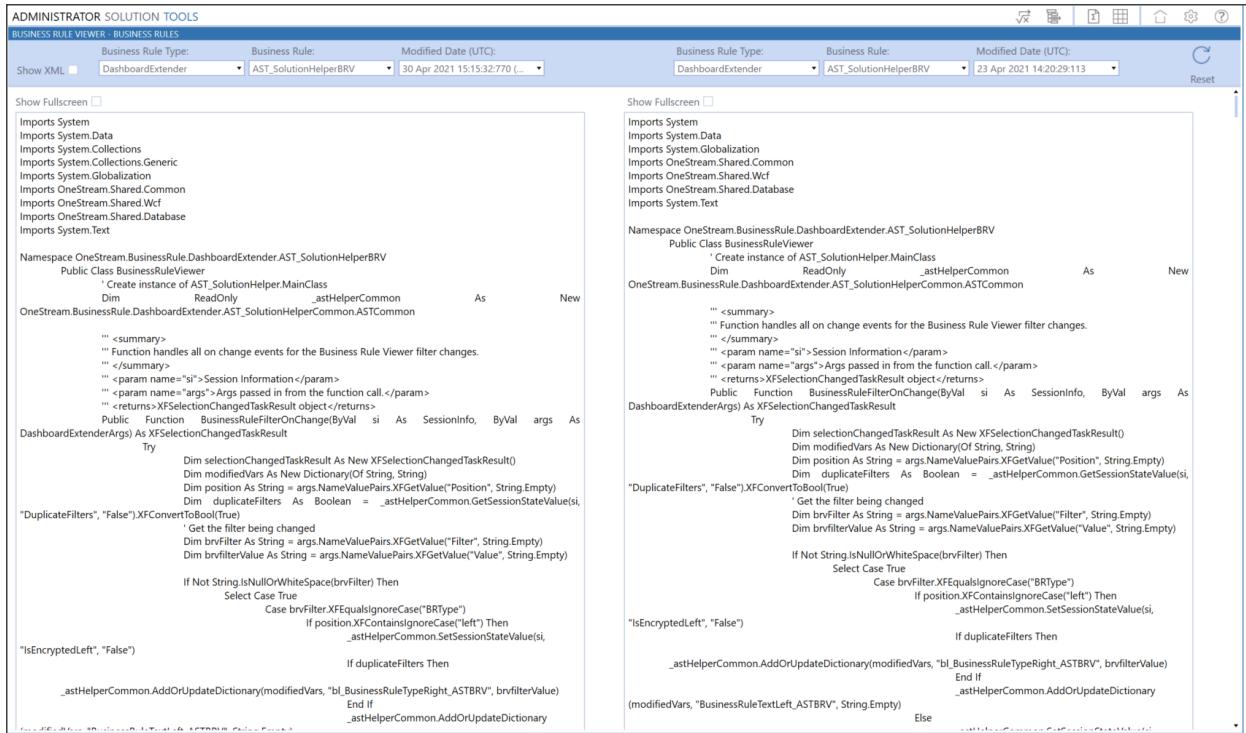
1. In the Business Rule Type drop-down list to the left, select the type of the business rule to view.
2. In the left Business Rule drop-down, select the business rule to view. Only rules belonging to the specified rule type display..
3. In Modified Date (UTC), select the version of the business rule to view.

**NOTE:** Business rules that are encrypted include the text (**encrypted**) in the Modified Date (UTC) value. Encrypted business rules do not display in the Business Rule Viewer. When you select an encrypted business rule, the text **Selected business rule is encrypted** displays in the viewing area.

**See also:** *Business Rule Encryption (Decryption)* in the *Application Tools* section of the *Design and Reference Guide* for more information.

In the following example, the most recent version of the AST\_SolutionHelperBRV business Rule displays on the left, with the next most recent version of the same rule on the right.

## View Business Rules and Member Formulas



The screenshot shows the Business Rule Viewer interface with two panes. The left pane displays the main rule logic, including imports, namespaces, and a main class definition. The right pane is connected to the left and shows a detailed breakdown of a specific section of the code, likely a selection or filter logic. The two panes scroll together, allowing for a detailed view of the rule's structure.

The left and right sides are connected and scroll together, making it easy to view them.

## View Business Rule XML

By default, business rules do not show the XML code at the beginning and end of the rule. You can display the XML code for selected rules by clicking **Show XML** in the desired view. The Business Rule Viewer keeps the displayed rules connected if you show the XML code.

## View Business Rules and Member Formulas

ADMINISTRATOR SOLUTION TOOLS

BUSINESS RULE VIEWER - BUSINESS RULES

Business Rule Type: Finance Business Rule: DBP\_ToggleOff Modified Date (UTC): 11 Feb 2018 16:14:52:770 (...

Business Rule Type: Finance Business Rule: DBP\_ToggleOff Modified Date (UTC): 10 Feb 2018 16:14:52:440 (...

Reset

```

<businessRule businessRuleType="Finance" name="DBP_ToggleOff">
  <accessGroup>Everyone</accessGroup>
  <maintenanceGroup>Everyone</maintenanceGroup>
  <isGlobal>false</isGlobal>
  <referencedAssemblies />
  <sourceCode><![CDATA[Imports System
Imports System.Data.Common
Imports System.IO
Imports System.Collections.Generic
Imports System.Globalization
Imports System.Linq
Imports Microsoft.VisualBasic
Imports System.Windows.Forms
Imports OneStream.Shared.Common
Imports OneStream.Shared.Wcf
Imports OneStream.Shared.Engine
Imports OneStream.Shared.Database
Imports OneStream.Stage.Engine
Imports OneStream.Stage.Database
Imports OneStream.Finance.Engine
Imports OneStream.Finance.Database

Namespace OneStream.BusinessRule.Finance
  Public Class MainClass
    Public Function Main(ByVal si As SessionInfo, ByVal globals As BRGlobals, ByVal api As FinanceRulesApi, ByVal args As FinanceRulesArgs) As Object
      Try
        Select Case api.FunctionType
          Case Is = FinanceFunctionType.Calculate
            If "DBP_ToggleSeedLogic", "False" Then
              BRApi.Dashboards.Parameters.SetLiteralParameterValue(si, False, "DBP_ToggleSeedLogic")
            Else
              BRApi.Dashboards.Parameters.SetLiteralParameterValue(si, False, "ALX_ToggleAllocLogic")
            End If
            Return ConditionalInputResultType.Default
          End Select
        Return Nothing
        Catch ex As Exception
          Throw ErrorHandler.LogWrite(si, New XException(ex))
        End Try
      End Function
    End Class
  End Namespace
]]></sourceCode>
</businessRule>

```

```

<businessRule businessRuleType="Finance" name="DBP_ToggleOff">
  <accessGroup>Everyone</accessGroup>
  <maintenanceGroup>Everyone</maintenanceGroup>
  <isGlobal>false</isGlobal>
  <referencedAssemblies />
  <sourceCode><![CDATA[Imports System.Data
Imports System.Data.Common
Imports System.IO
Imports System.Collections.Generic
Imports System.Globalization
Imports System.Linq
Imports Microsoft.VisualBasic
Imports System.Windows.Forms
Imports OneStream.Shared.Common
Imports OneStream.Shared.Wcf
Imports OneStream.Shared.Engine
Imports OneStream.Shared.Database
Imports OneStream.Stage.Engine
Imports OneStream.BusinessRule.Finance.DBP_ToggleOff
  Public Class MainClass
    Public Function Main(ByVal si As SessionInfo, ByVal globals As BRGlobals, ByVal api As FinanceRulesApi, ByVal args As FinanceRulesArgs) As Object
      Try
        Select Case api.FunctionType
          Case Is = FinanceFunctionType.Calculate
            If "DBP_ToggleSeedLogic", "False" Then
              BRApi.Dashboards.Parameters.SetLiteralParameterValue(si, False, "DBP_ToggleSeedLogic")
            Else
              BRApi.Dashboards.Parameters.SetLiteralParameterValue(si, False, "ALX_ToggleAllocLogic")
            End If
            Return ConditionalInputResultType.Default
          End Select
        Return Nothing
        Catch ex As Exception
          Throw ErrorHandler.LogWrite(si, New XException(ex))
        End Try
      End Function
    End Class
  End Namespace
]]></sourceCode>
</businessRule>

```

## **View Business Rules and Member Formulas**

## Access the Business Rule Source

When viewing business rules, you may want to make edits to the rule itself. To do this, click **Show Business Rule Page**  . The **Business Rule** page displays in a separate tab. Use CTRL + A to highlight the rule to copy and paste, then navigate to the business rule you want to edit.

```
1  Imports System
2  Imports System.Data
3  Imports System.Collections
4  Imports System.Collections.Generic
5  Imports System.Globalization
6  Imports OneStream.Shared.Common
7  Imports OneStream.Shared.Ncf
8  Imports OneStream.Shared.Database
9  Imports System.Text
10 
11  Namespace OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperBRV
12  Public Class BusinessRuleViewer
13      ' Create instance of AST_SolutionHelper.MainClass
14      Dim ReadOnly _astHelperCommon As New OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperCommon.ASTCommon
15 
16      ' <summary>
17      ' <summary> Function handles all on change events for the Business Rule Viewer filter changes.
18      ' </summary>
19      ' <param name="si">Session Information</param>
20      ' <param name="args">Args passed in from the function call.</param>
21      ' <returns>XSelectionChangedTaskResult object</returns>
22  Public Function BusinessRuleFilterOnChange(Byval si As SessionInfo, ByVal args As DashboardExtenderArgs) As XSelectionChangedTaskResult
23      Try
24          Dim selectionChangedTaskResult As New XSelectionChangedTaskResult()
25          Dim modifiedVars As New Dictionary(Of String, String)
26          Dim position As String = args.NameValuePairs.XFGetValue("Position", String.Empty)
27          Dim duplicateFilters As Boolean = _astHelperCommon.GetSessionStateValue(si, "DuplicateFilters", "False").XFConvertToBool(True)
28 
29          ' Get the filter being changed
30          Dim brvFilter As String = args.NameValuePairs.XFGetValue("Filter", String.Empty)
31          Dim brvfilterValue As String = args.NameValuePairs.XFGetValue("Value", String.Empty)
32 
33          If Not String.IsNullOrEmptyWhiteSpace(brvFilter) Then
34              Select Case True
35                  Case brvFilter.XFEqualsIgnoreCase("BRType")
36                      If position.XFContainsIgnoreCase("left") Then
37                          _astHelperCommon.SetSessionStateValue(si, "IsEncryptedLeft", "False")
38                          If duplicateFilters Then
39                              _astHelperCommon.AddOrUpdateDictionary(modifiedVars, "bl_BusinessRuleTypeRight_ASTBRV", brvfilterValue)
40                          End If
41                      Else
42                          _astHelperCommon.SetSessionStateValue(si, "IsEncryptedRight", "False")
43                          If duplicateFilters Then
44                              _astHelperCommon.AddOrUpdateDictionary(modifiedVars, "bl_BusinessRuleTypeLeft_ASTBRV", brvfilterValue)
45                          End If
46                      _astHelperCommon.AddOrUpdateDictionary(modifiedVars, "BusinessRuleTextLeftRight_ASTBRV", String.Empty)
47                  End If
48                  Case brvFilter.XFEqualsIgnoreCase("BRName")
49                      If position.XFContainsIgnoreCase("left") Then
50                          _astHelperCommon.SetSessionStateValue(si, "IsEncryptedLeft", "False")
51                          If duplicateFilters Then
52                              _astHelperCommon.AddOrUpdateDictionary(modifiedVars, "bl_BusinessRuleNameRight_ASTBRV", brvfilterValue)
53                          End If
54                  End If
55              End Select
56          End If
57      End Try
58  End Function
```

**See also:** *Business Rules* in the *Application Tools* chapter of the *Design and Reference Guide*.

## View a Member Formula

Use the Member Formula viewer to view all member formulas.

## View Business Rules and Member Formulas

---

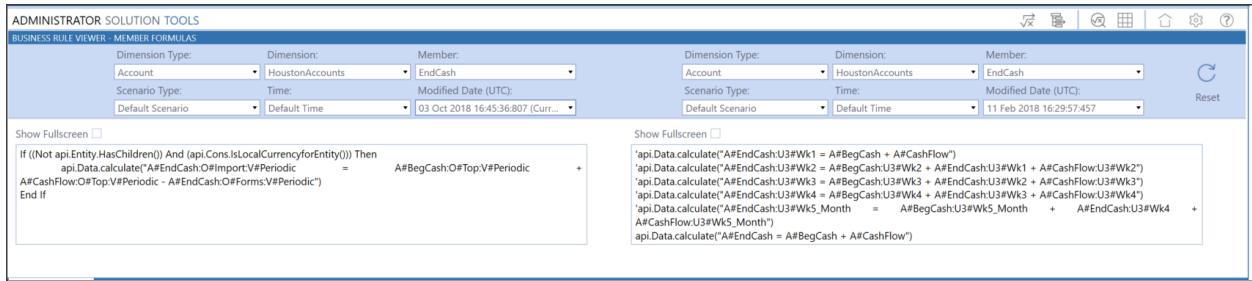
To view a formula in the Member Formula Viewer, filter using the drop-down list to the left find formulas.

**IMPORTANT:** You can only access the Member Formula Viewer from the Business Rule Viewer.

1. To access the Member Formula Viewer click **Show Member Formula Viewer Page**  .
2. In Dimension Type, make selections from these options for the member formula you want to view:
  - **Dimension Type:** Select the dimension type for the member whose member formula you want to view.  
Dimension Types are used to group dimensions and includes User-Defined dimensions. Only Dimension Types used display in the list.
  - **Dimension:** Select the Dimension containing the member whose formula you want to view. Only dimensions belonging to the specified Dimension Type display in the list.
  - **Member:** Select the member of the Member Formula you want to view.
  - **Scenario Type:** Select the Scenario Type associated with the member formula you want to view. Select **Default Scenario** if the Member Formula applies to all scenario types. A scenario type can contain multiple scenarios.
  - **Time:** This list contains the Time Profile for the selected Scenario Type. Select the Time for the Scenario Type containing the Member Formula you want to view.
  - **Modified Date (UTC):** Select the version of the Member Formula you want to view.

## View Business Rules and Member Formulas

---



The left and right sides are still connected, so the left and right sides scroll together, making it easy to compare them.

## Access the Member Formula Source

When viewing member information, you can edit the member formula.

You can access the Dimension Library while working in the Member Formula Viewer. Copy the text using CTRL + A then click the **Show Dimension Library Page**  button.

The Dimension Library displays in a separate tab, and displays the most recently accessed member properties. In the Members tab of the Dimension Library, navigate to the member formula to edit.

## View Business Rules and Member Formulas

---

**See Also:** *Member Formulas* in the *Foundation Guides* chapter of the *Design and Reference Guide*.

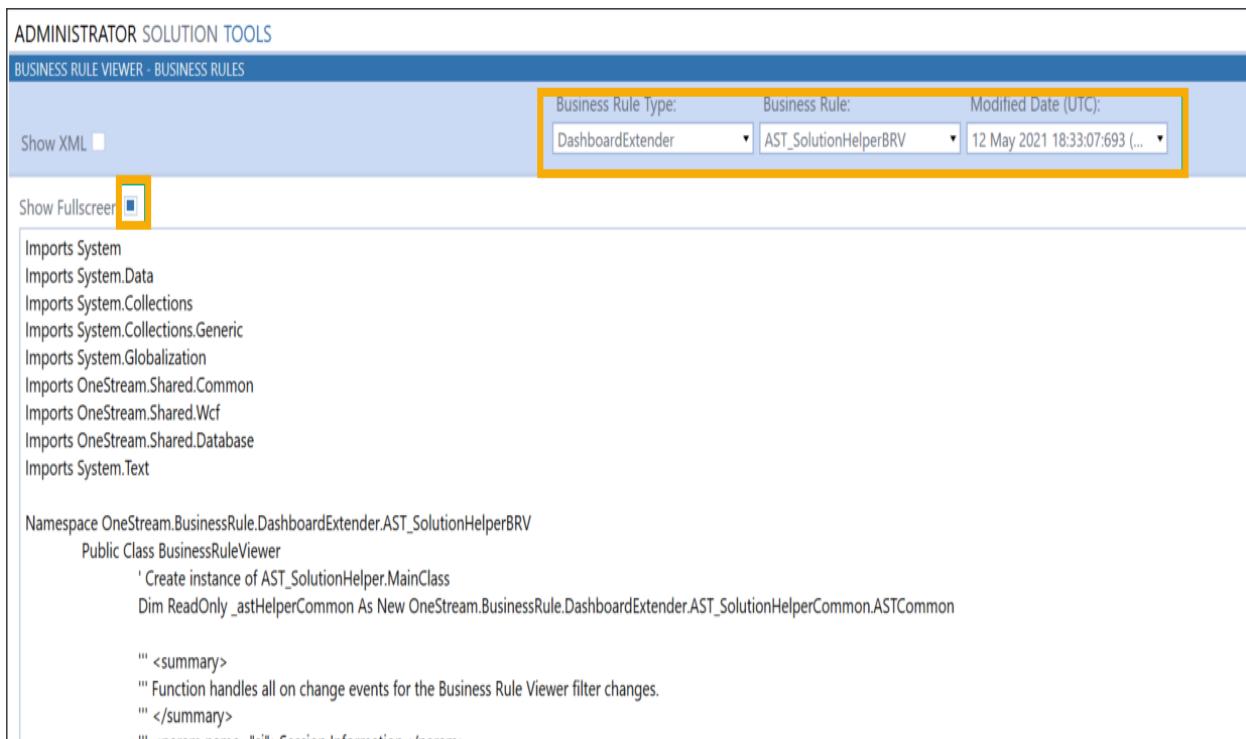
## View a Single Business Rule or Member Formula

The text box sizes for the side-by-side view in the Business Rule viewer may cause lines in a business rule or formula to display on two or more lines, making it difficult to read.

Click **Show Fullscreen** to resolve this issue.

## View Business Rules and Member Formulas

---



ADMINISTRATOR SOLUTION TOOLS

BUSINESS RULE VIEWER - BUSINESS RULES

Show XML

Business Rule Type:  Business Rule:  Modified Date (UTC):

Show Fullscreen

Imports System  
Imports System.Data  
Imports System.Collections  
Imports System.Collections.Generic  
Imports System.Globalization  
Imports OneStream.Shared.Common  
Imports OneStream.Shared.Wcf  
Imports OneStream.Shared.Database  
Imports System.Text

Namespace OneStream.BusinessRule.DashboardExtender.AST\_SolutionHelperBRV

```
Public Class BusinessRuleViewer
    ' Create instance of AST_SolutionHelper.MainClass
    Dim ReadOnly _astHelperCommon As New OneStream.BusinessRule.DashboardExtender.AST_SolutionHelperCommon.ASTCommon

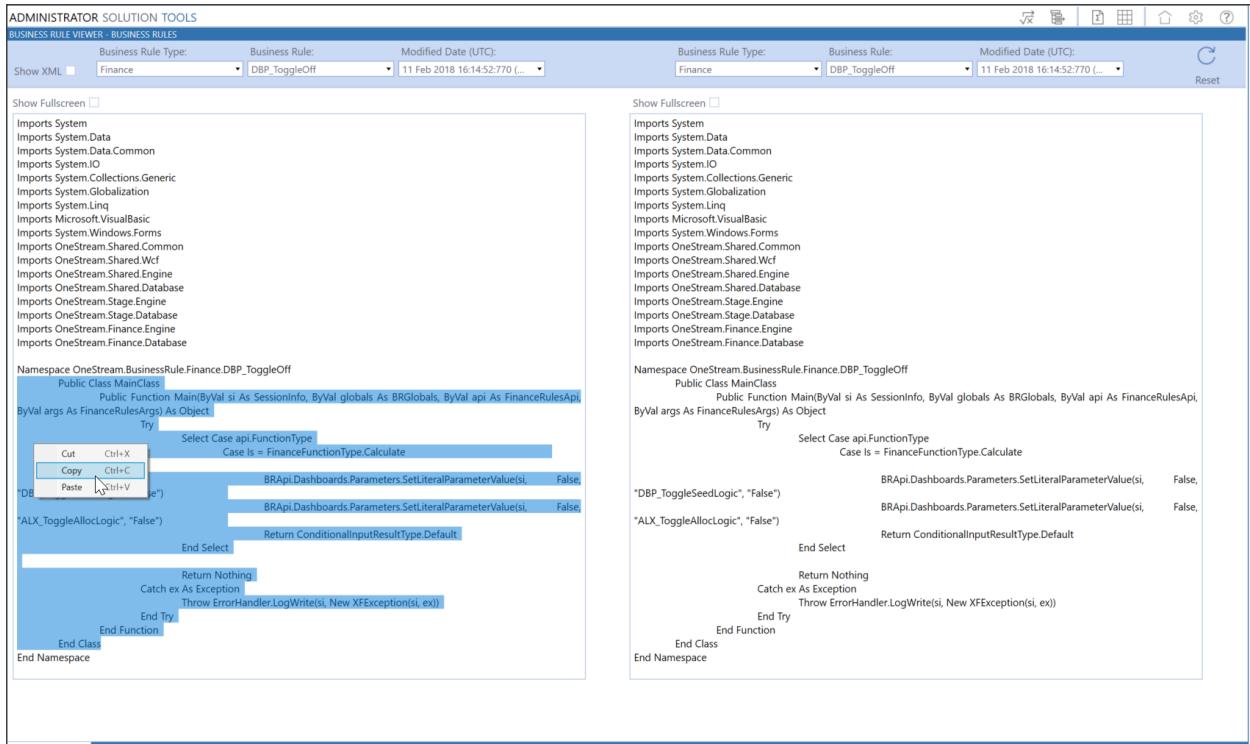
    ''' <summary>
    ''' Function handles all on change events for the Business Rule Viewer filter changes.
    ''' </summary>
    '''
```

Toggling between Fullscreen view and the standard view does not disconnect the left and right side filter values. For example, if you reset the filter values and then switch back to the standard view, the left and right sides scroll together.

## Copy a Business Rule or Member Formula

You can copy any text in the left or right view. This is useful when you want to edit or replace a business rule or member formula. Select the text, and then **CTRL+C** to copy. To select the entire rule use **CTRL+A**.

## View Business Rules and Member Formulas



## Viewing Business Rule and Member Formula

### Change Histories

Use the Business Rule Viewer - Historical Viewer to determine when business rule or formulas were updated. From the Business Rule Viewer, click **Show History Page** to display the viewer and access the change histories.

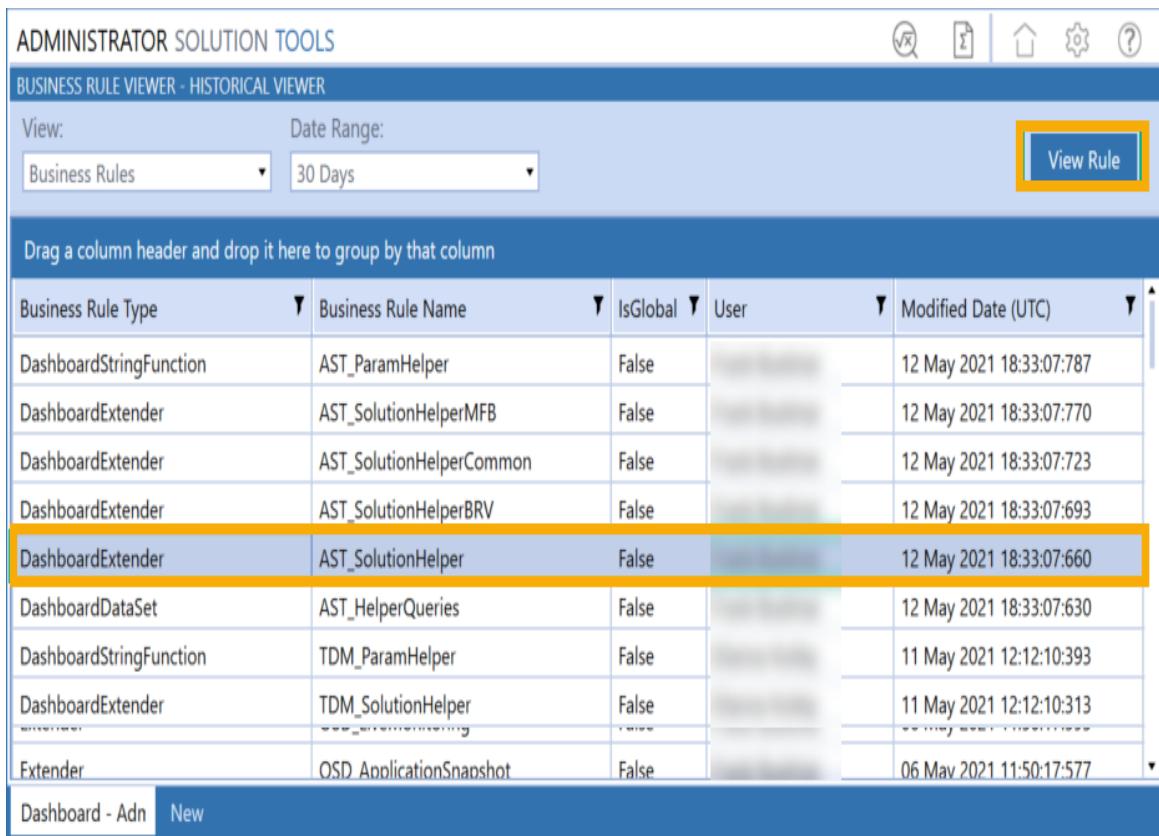
Clicking the **Show History Page** icon while viewing business rules displays the Business Rule history. Click **Show History Page** while viewing formulas to display their history. Historical data displays in a grid, allowing you to group records using the grid capabilities.

## View Business Rules and Member Formulas

---

1. From **View**, select Business Rules or Member Formulas.
2. In the **Date Range** field, select the number of days from today to display historical records. For example, to display the last 30 days of changes, select 30 from the list.

**TIP:** The records listed in the grid change based on your selections.



| Business Rule Type      | Business Rule Name       | IsGlobal | User | Modified Date (UTC)      |
|-------------------------|--------------------------|----------|------|--------------------------|
| DashboardStringFunction | AST_ParamHelper          | False    |      | 12 May 2021 18:33:07:787 |
| DashboardExtender       | AST_SolutionHelperMFB    | False    |      | 12 May 2021 18:33:07:770 |
| DashboardExtender       | AST_SolutionHelperCommon | False    |      | 12 May 2021 18:33:07:723 |
| DashboardExtender       | AST_SolutionHelperBRV    | False    |      | 12 May 2021 18:33:07:693 |
| DashboardExtender       | AST_SolutionHelper       | False    |      | 12 May 2021 18:33:07:660 |
| DashboardDataSet        | AST_HelperQueries        | False    |      | 12 May 2021 18:33:07:630 |
| DashboardStringFunction | TDM_ParamHelper          | False    |      | 11 May 2021 12:12:10:393 |
| DashboardExtender       | TDM_SolutionHelper       | False    |      | 11 May 2021 12:12:10:313 |
| Extender                | OSD_ApplicationSnapshot  | False    |      | 06 May 2021 11:50:17:577 |

3. To view a business rule or member formula, select it in the grid and click the **View** button. This lets you access details in the appropriate viewer.

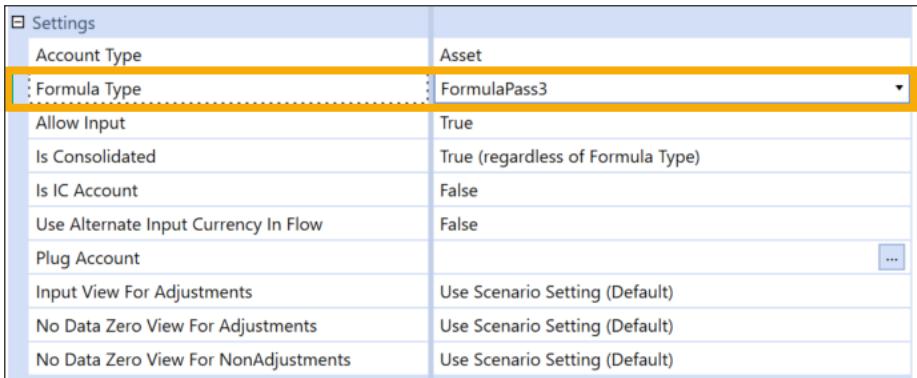
# Build Simple Member Formulas

 The Member Formula Builder lets you create basic member formulas. If you need a complex formula, create it in the Dimension Library.

**See also:** The *Member Formulas* section in the *Foundation Guides* chapter of the *Design and Reference Guide*.

To launch Member Formula Builder, click **Member Formula Builder** on the Administrator Solution Tools **Home** page.

Before building a member formula, ensure the member exists and the Formula Type, either stored or dynamic, is established in the member's properties settings. To select the formula type, click **Application> Dimensions**, select the member, select **Member Properties**, and then select the formula type in **Settings**.



Use FormulaPass1 – FormulaPass16 for stored formulas. Use DynamicCalc and DynamicCalcTextInput for dynamic formulas.

# Formula Build Process

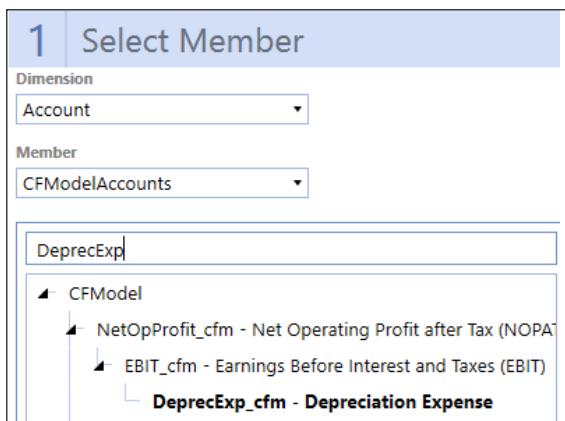
Perform these steps to build a member formula:

- Select the dimension, member, and account you want to create the member formula.
- Select Scenario Type and Time properties.
- Build the formula and add calculation filters.

## Select the Member

Select the dimension from the drop-down and then select the member.

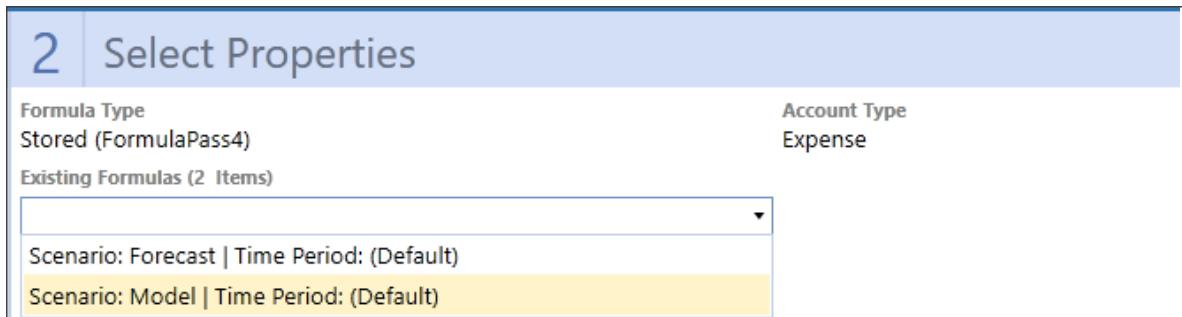
**TIP:** To access a known member, use the search bar at the top of the Select Member pane to find the member or you can navigate through the hierarchy to find the appropriate member.



After you select a dimension, member, and account member for your formula, the other panes of the Member Formula Builder appear and you can continue the formula build process.

## Select Properties

In the Select Properties pane, the Formula Type and Account Type labels show the formula or account type assigned to a selected member. The Existing Formulas drop-down list shows **Scenario: (Default)|Time Period: (Default)** and displays other existing formulas on a selected member. If you select the default Scenario and Time formula, the Scenario Type and Time display as (Default Scenario Type) and (Default Time) respectively.



Select the scenario and time to apply to the formula.

If there is already a formula associated with the member, you can preview the formula before making any changes. Click **Preview** to display the existing formula.

## Build Simple Member Formulas

---

The screenshot shows the Member Formula Builder interface with five main steps:

- 2 Select Properties:** Set Formula Type to "Stored (Not Used)", Account Type to "Revenue", Scenario: (Default) | Time Period: (Default), Scenario Type: (Default Scenario Type), and Time: (Default Time).
- 3 Build Formula:** Shows the "Formula Preview" dialog with tabs for "Member Formula" and "Drilldown Formula". The "Member Formula" tab displays the generated formula:

```
If ((Not api.Entity.HasChildren()) And (api.Cons.IsLocalCurrencyForEntity())) Then
    api.data.calculate("A#Test1a=" RemoveZeros(78*45), "A#[GAAPAccountStructure].Descendants", "F#[TotalBalance].Children", "O#Elimination.ChildrenInclusive", "I#Top.DescendantsInclusive", "U1#EntityDefault.Children", "U2#None.Children", "U3#UD1Default.DescendantsInclusive", "U4#EntityDefault.Children", "U5#EntityDefault.ChildrenInclusive", "U6#UD1Default.Descendants", "U7#EntityDefault.ChildrenInclusive", "U8#UD1Default.Base")
end if
```
- 4 Member Properties:** Shows the "Comments" and "Formula" sections. The "Formula" section contains the text "A#Test1a= 78\*45".
- 5 Add Calculation Filters:** Shows dropdowns for A#, F#, O#, and I# with their respective formula paths.
- Preview:** Shows the generated formula in a code editor-like view with "Create" and "Clear All" buttons.

You cannot edit a formula if it was created outside of the Member Formula Builder. Users with the Administrator role can edit formulas created outside of the Member Formula Builder in the Dimension Library. Click **Dimension Library** to go to Member Properties, where you can edit the formula.

## Build Simple Member Formulas

The screenshot shows the 'Member Formula Builder' interface. On the left, under '1 Select Member', there are dropdowns for 'Dimension' (Account) and 'Member' (HoustonAccounts). A tree view under 'Filter' shows various financial categories like GAAP Account Structure, Income Statement, Balance Sheet, Ratios, Liquidity Ratios, Profitability Analysis Ratios, Activity Analysis Ratios, Capital Structure Analysis Ratios, Capital Market Analysis Ratios, Statistics, Flash, Cash Flow, Alloc Account Structure, and IFRS Account Structure. A specific ratio, 'CurRatio - Current Ratio', is selected and highlighted. On the right, under '2 Select Properties', there are dropdowns for 'Formula Type' (Dynamic), 'Existing Formulas (1 Item)', 'Scenario: (Default)', 'Time Period: (Default)', 'Scenario Type' (Default Scenario Type), and 'Time' (Default Time). The 'Account Type' is set to 'DynamicCalc'. A yellow box highlights a message: 'The existing formula selected was created outside of Member Formula Builder. To update this formula, please reference the Member Properties.' A 'Dimension Library' button is also visible.

## Build the Formula

Use the Build Formula section to create a simple member formula.

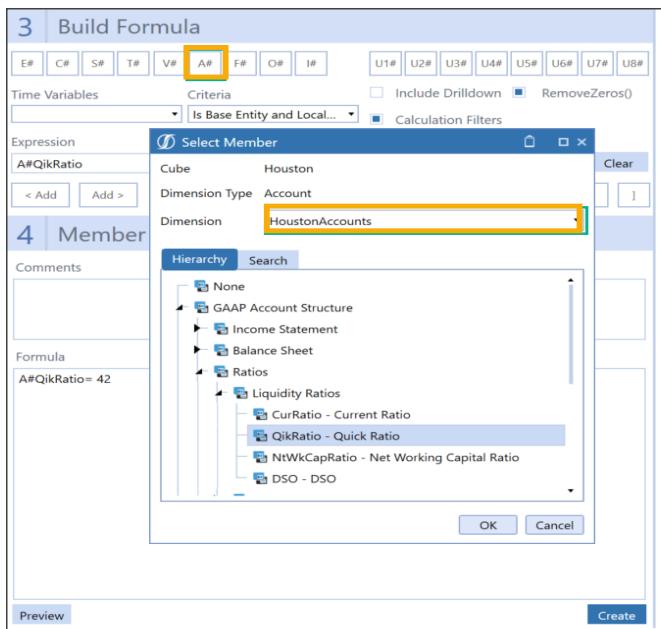
The screenshot shows the '3 Build Formula' section. It includes a grid of dimension icons (E#, C#, S#, T#, V#, A#, F#, O#, I#, U1#, U2#, U3#, U4#, U5#, U6#, U7#, U8#). Below this are 'Time Variables' and 'Criteria' dropdowns, with checkboxes for 'Include Drilldown', 'RemoveZeros()', and 'Calculation Filters'. An 'Expression' field contains the text 'A#DeprecExp\_cfm', and a toolbar below it includes operators (+, -, \*, /, (, ), [, ]), an 'Add' button, and a 'Clear' button.

### Dimension Icons

When you select a dimension icon, the **Select Member** dialog box appears so you can select the appropriate member from the hierarchy.

## Build Simple Member Formulas

---



### Time Variables

These are sample Time Functions that can be used to create a formula and were included for ease of formula creation. Items selected from this dropdown are added to the Expression. For more information on Time Functions, see the *Design and Reference Guide*.

### Criteria

Defines the dimension to which the formula is applicable. If a criteria is selected from the dropdown, it does not show in the Member Formula text box but can be seen in the **Preview** dialog box.

### Expression

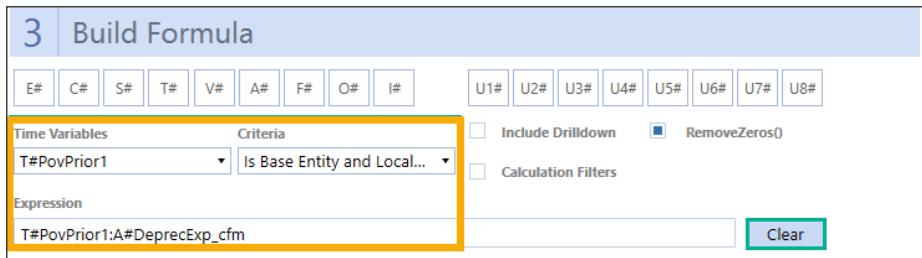
This text box shows the selected dimensions or time functions selected. For stored formulas, the expression automatically populates for the member selected in the Select Member pane to help start the stored formula creation. Any text that is entered here can be cleared using the **Clear** button.

### Clear

The **Clear** button is used to clear the **Expression** text box.

## Build Simple Member Formulas

---



### Add

There are left and right **Add** buttons which determine whether to place the expression before or after the Member Formula. Click the appropriate **Add** button to add the content currently in the **Expression** text box to the specified place in the **Member Formula**.

### Calculation Filters

Only appears for stored formulas. This option lets you build calculation filters based on dimensions. Selecting this check box displays the Add Calculation Filters pane that lets you add filters that are calculated only if certain criteria are met.

To add a calculation filter:

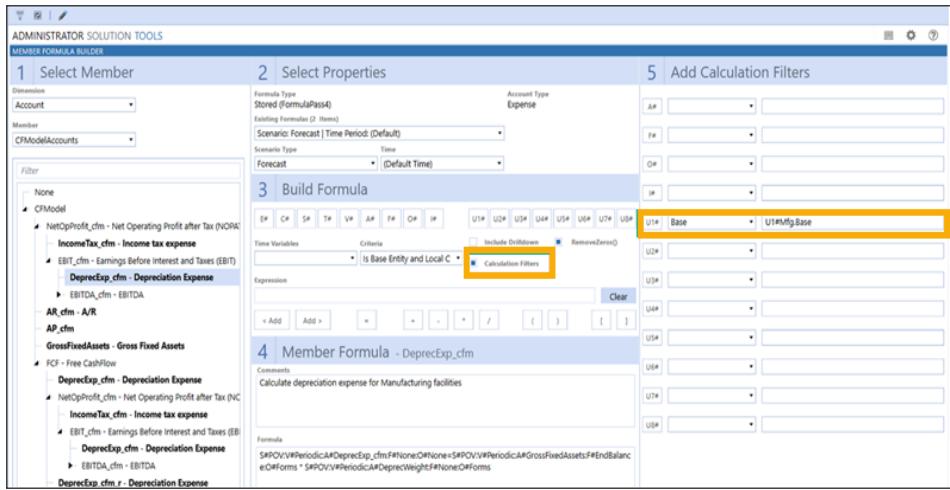
1. Under **Build Formula**, select the **Calculation Filters** check box to open the **Add Calculation Filters** pane.
2. In the **Add Calculation Filters** pane, click on the desired dimension button. The **Select Member** dialog box displays.
3. Use navigation in the **Hierarchy** and **Search** tabs to select a member to which the calculation filter applies.

**TIP:** You can use the **Select Member** dialog box to select multiple members to which the calculation filter applies.

## Build Simple Member Formulas

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4. Click **OK** to close the **Select Member** dialog box and return to the **Add Calculation Filters** pane. Selected members are added to the calculation filter.
5. Select the expansion from the drop-down next to the selected dimension.

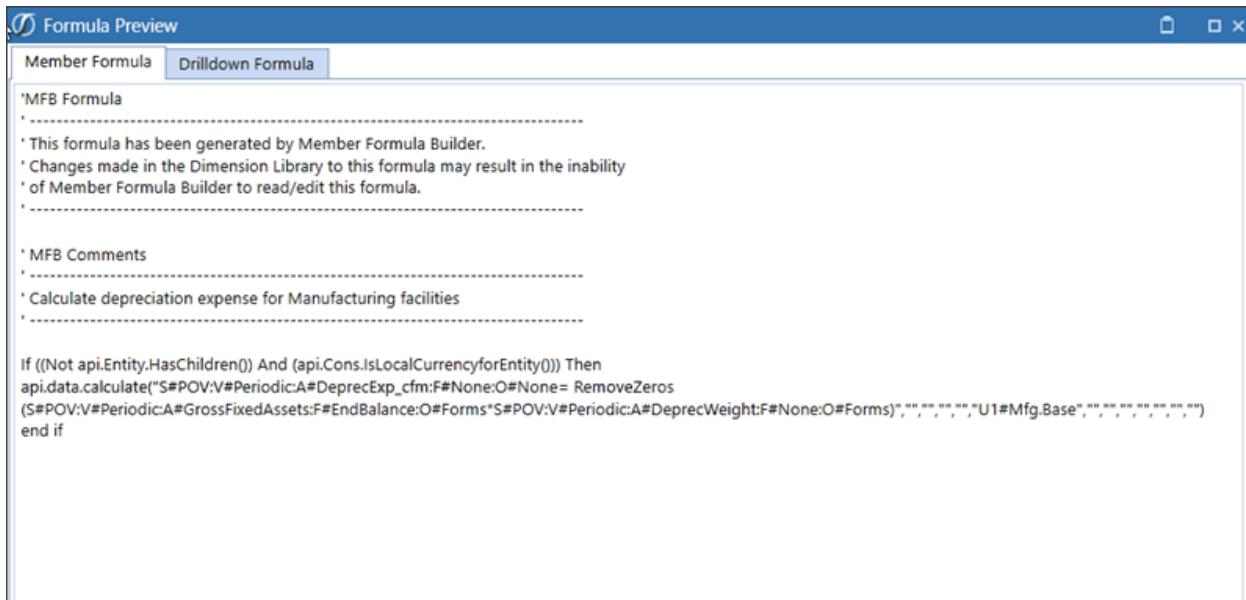


In the previous example, the formula first runs on the UD1 base members under the **U1#Mfg.Base** dimension. The calculation filter is added by selecting the U1# icon, then selecting the member from the Select Member dialog. The appropriate expansion is added by selecting from the drop-down.

Criteria defined in the text boxes are automatically saved and are part of the formula creation. You can see the calculation filters as part of your formula by clicking **Preview**.

## Build Simple Member Formulas

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### Comments

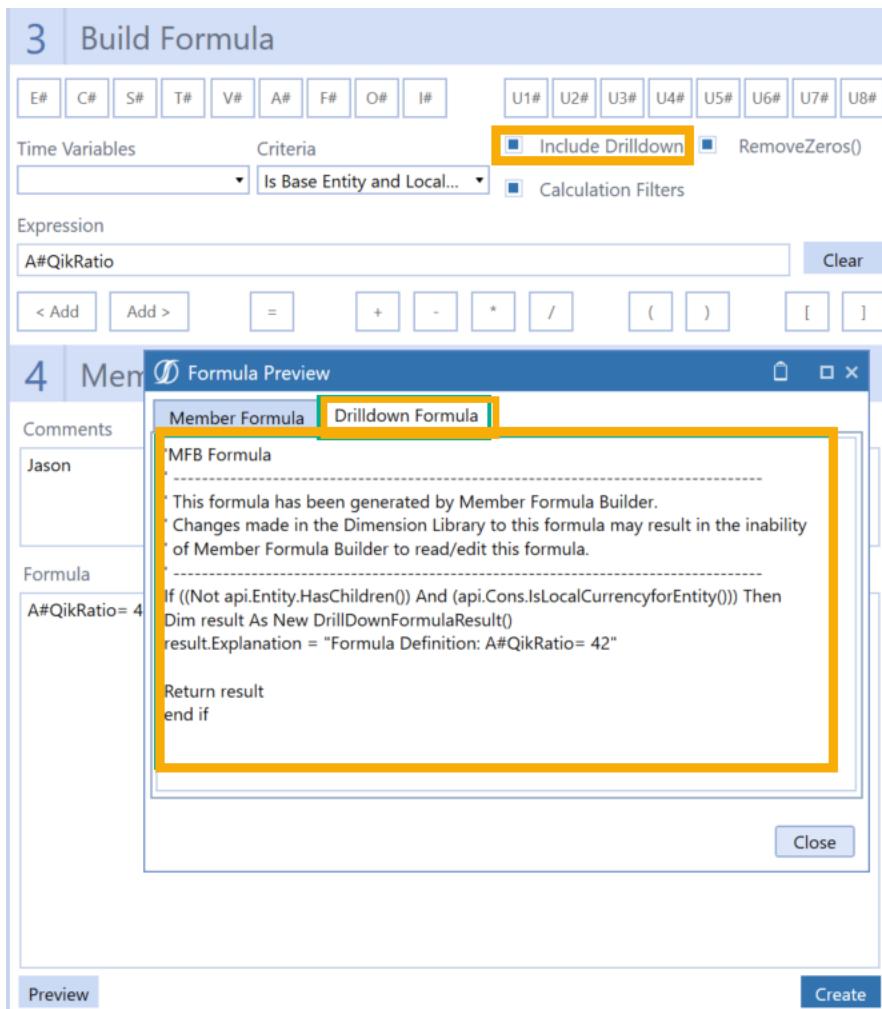
Use this to include a description for the formula. When you preview the formula, you can also review the comments.

### Include Drilldown

Selecting this check box allows drilldowns on the field for which the formula is being created. This also allows you to edit the drilldown formula, which displays in the Drilldown Formula tab of the Formula Preview.

## Build Simple Member Formulas

---



The screenshot shows the Member Formula Builder interface. In the 'Expression' section, the formula `A#QikRatio` is entered. Below the expression is a toolbar with operators: < Add, Add >, =, +, -, \*, /, (, ), [, ]. The 'Formula Preview' window is open, showing the generated VBA code:

```
-----  
MFB Formula  
-----  
This formula has been generated by Member Formula Builder.  
Changes made in the Dimension Library to this formula may result in the inability  
of Member Formula Builder to read/edit this formula.  
  
If ((Not api.Entity.HasChildren()) And (api.Cons.IsLocalCurrencyforEntity())) Then  
Dim result As New DrillDownFormulaResult()  
result.Explanation = "Formula Definition: A#QikRatio= 42"  
  
Return result  
end if  
-----
```

The 'Drilldown Formula' tab is selected in the preview window. The 'Preview' and 'Create' buttons are at the bottom of the preview window.

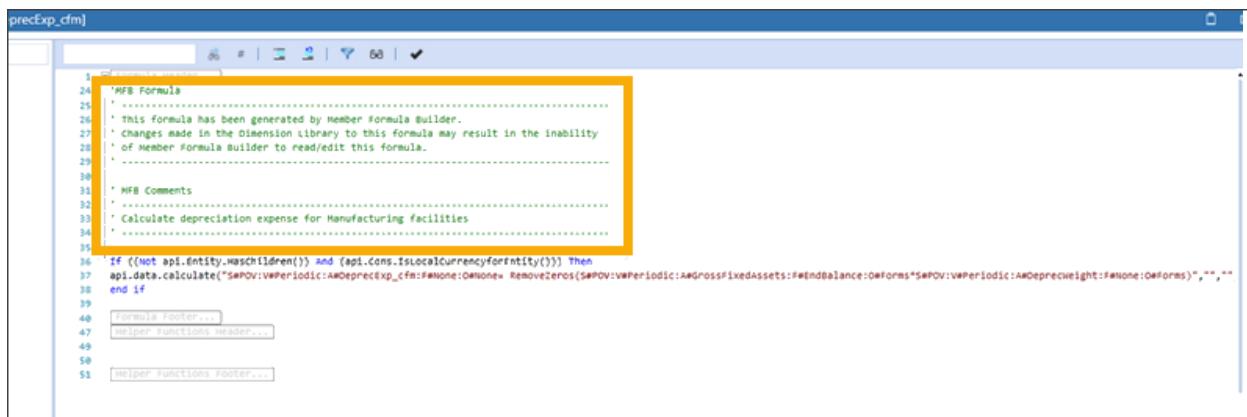
### RemoveZeros()

The `RemoveZeros()` function can be used to evaluate a source data buffer and remove all zeros in cells where the amount is zero whether or not it is flagged as a NoData cell. This function is important to use for performance purposes and therefore is enabled by default.

**See also:** The *Design and Reference Guide* for more information on the `RemoveZeros()` function.

# Add Formula Complexity

You can use the Formula Editor to add complexity to a formula originally created in Member Formula Builder outside of the solution (such as creating multi-line rules). We recommend that you remove the Member Formula Builder syntax from business rule. This prevents formula creators from viewing and updating complex rules in the Member Formula Builder.



The screenshot shows the Formula Editor window with the file name 'precExp.cfm'. The code is as follows:

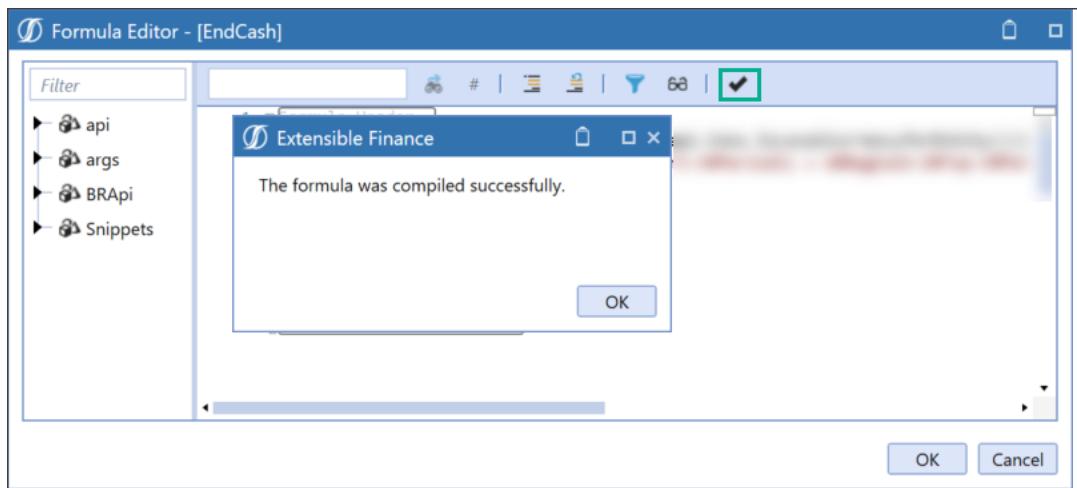
```
1 'MFB Formula
2 '-----
3 ' this formula has been generated by Member Formula Builder.
4 ' changes made in the Dimension library to this formula may result in the inability
5 ' of Member Formula Builder to read/edit this formula.
6 '-----
7 ' MFB Comments
8 '-----
9 ' Calculate depreciation expense for Manufacturing facilities
10 '-----
11 'if ((not api.Entity.HasChildren()) And (api.Cons.IsLocalCurrencyForEntity())) Then
12 '    api.data.calculate("s#POV:V#Periodic:@#DeprecExp_cfm:f#None:O#None: RemoveZeros(s#POV:V#Periodic:@#GrossFixedAssets:@#Forms*s#POV:V#Periodic:@#DeprecWeight:f#None:@#Forms)" , "", "")
13 'end if
14 '-----
15 'Formula Footer...
16 '-----
17 'Helper Functions Header...
18 '-----
19 '-----
20 'Helper Functions Footer...
```

A yellow box highlights the first few lines of the code, specifically the 'MFB Formula' and 'MFB Comments' sections.

**NOTE:** After building a formula, return to the Dimension Library and click **Compile** on the Formula Editor's toolbar to ensure that the VB.NET syntax is correct.

## Build Simple Member Formulas

---



# Manage Home Pages for Users

The **Home Page Manager** page allows Administrators to assign users or user groups to a default Home Page that displays when you log into OneStream. To launch **Home Page Manager**, select the icon on the **Administrator Solution Tools** home page.

The Home Page Manager lets you assign a default page to any user or user group. By default, only users in the Administrators User Group can access the Home Page Manager, and only Administrators can change this setting.

Users and User Groups are part of system security and are defined in OneStream.

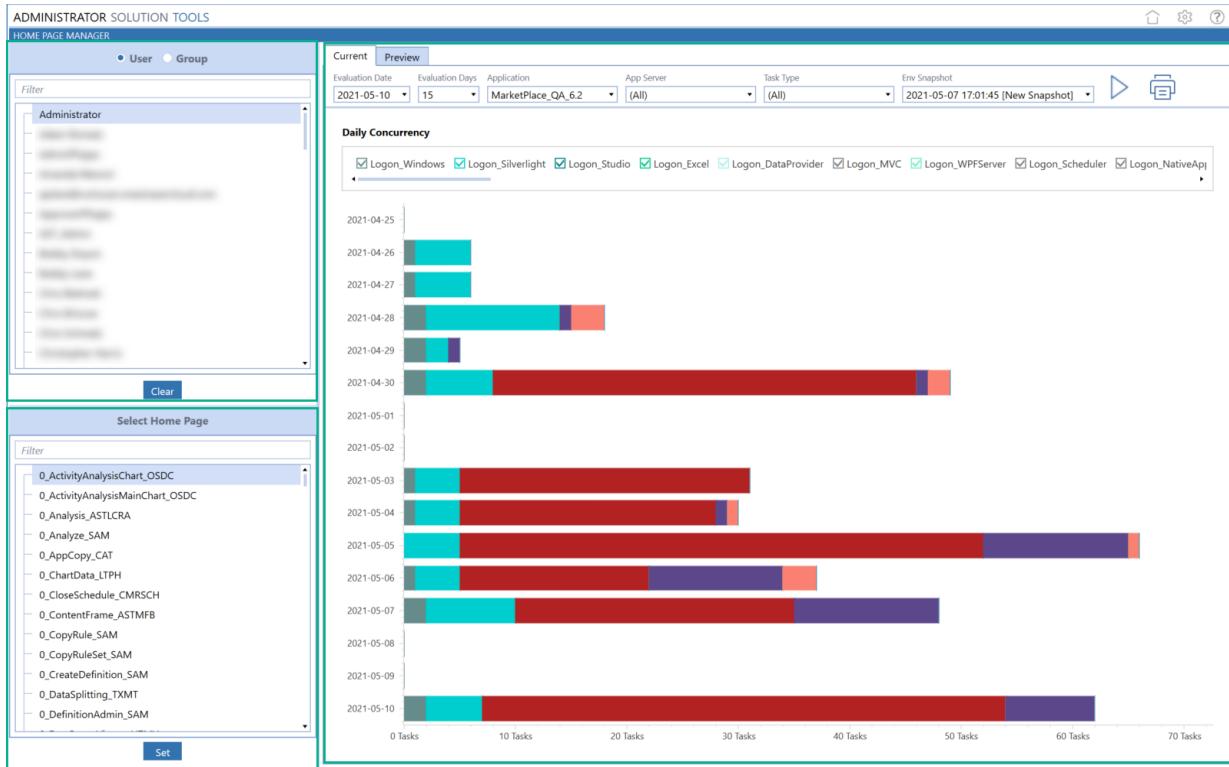
**See also:** *System Security Users and Groups* in the *System Administration* chapter of the *OneStream Design and Reference Guide* for more information about creating users and user groups.

The Home Page Manager includes the following:

- A User/User Groups pane where you indicate if you are making an assignment for a single user or all users belonging to a specified user group.
- The **Select Home Page** pane, where you select the home page and assign it to the user or user group.
- The Home Page Viewer pane shows the currently assigned home page for a user (if any) in the **Current** tab, and a **Preview** tab that displays the currently selected home page. You can easily switch between these tabs to see current user home page assignments and preview other home pages to assign.

## Manage Home Pages for Users

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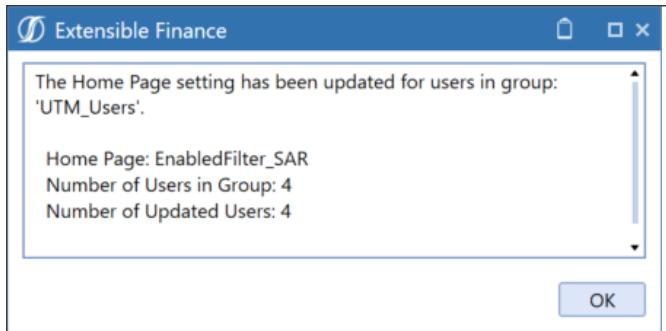
## Assign a Home Page

1. Use the radio buttons on the upper left pane to set whether the home page assignment is for a user or a user group.  
If a user already has a home page assigned, the **Current** tab in the **Home Page Viewer** pane shows the page assigned to the user. For both Users and User Groups, if a home page has been previously assigned, use the **Clear** button to unassign the current home page.
2. In the **Select Home Page** pane, select the home page you want to assign from the list. The selected home page displays in the **Home Page Viewer** pane's **Preview** tab.

## Manage Home Pages for Users

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3. Click **Set** to assign the home page to the selected user or user group. A message indicates that the Home Page setting was updated. For user groups, the message also includes the number of users in the group and information about any errors during processing.



**TIP:** The **User/User Group Selection** and **Select Home Page** panes include a filter that you can use to search for users, user groups, and home pages.

## Change a Home Page Assignment

1. Select the user or user group whose home page assignment you want to change. The currently assigned home page displays in the **Current** tab of the **Home Page Viewer** pane.
2. Click **Clear** to clear the current home page assignment for the selected user.
3. Use the **Select Home Page** pane to navigate to the home page you want to assign, and then click **Set**.

## Assigning a Home Page: Example

Below is an example of how to set up Homepage Manager for a group or individual users.

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**NOTE:** Your application may have different groups and dashboards since this is based on our example application.

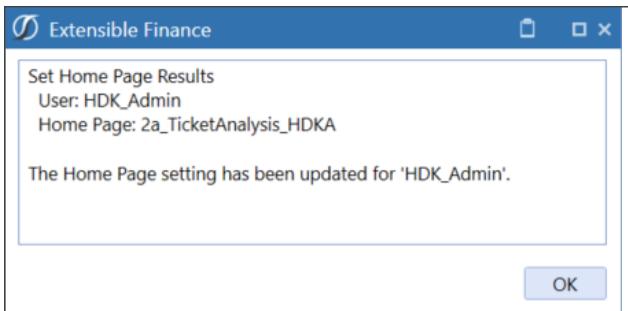
1. Click **User**.
2. Type HDK in the first Text Filter search box for the user group/user selection to find all users with HDK in the name. Click on the HDK\_Admin user to select it.
3. Enter HDK in the Home Page Text Filter search box to find the dashboards with HDK in the name. Select 2a\_TicketAnalysis\_HDKA.
4. The selected dashboard displays in the **Preview** pane and shows a sample of the selected dashboard.
5. Click **Set** to save the selections for the user HDK\_Admin.



For this example, the **Set Home Page** results displays as shown in the following image.

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6. Log in as **HDK\_Admin** to confirm that the user can access the selected dashboard.

## Respond to Processing Errors

The **Set Home Page Results** message provides error information when an Administrator tries to assign a dashboard to users who do not have access to the dashboard. Home Page Manager processes the changes that are valid and notes those that could not be processed in **Set Home Page Results**. Home Page Manager provides additional details for any other assignment errors in the error log for review and resolution.

**NOTE:** When selecting a preview in Home Page Manager and using Internet Explorer, solutions that contain multiple embedded dashboards may not display. This issue only occurs in the OneStream browser version.

# Clean Unneeded Log Entries



To launch Log Cleaner, click **Log Cleaner** on the Administrator Solution Tools home page.

Use the Log Cleaner to delete user log entries, error log entries or task activity log entries. The Access Log Cleaner setting in the Global Options determines which users can access this feature.

Perform these steps to delete logs:

- Select the type of logs you want to clear.
- Select the application and user for which you want to delete log records.
- Select the number of days from today you want log records to be retained.
- Select Execute to clear selected logs.

## Select Log Types to Clear

The first step to clear log files is to select the types of logs to be cleared. Use the fields in the Types to Clear section of Log Cleaner to do this. Select values from the following:

**NOTE:** All fields in this section are set to **No** by default.

### User Logon Activity

Set to **Yes** to clear records of all users when they log on and off OneStream applications. These records show who is logged on and when they log off for all applications.

### Error Logs

## Clean Unneeded Log Entries

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Set to **Yes** to clear any logs from error processes, including errors written from business rules.

### Task Activity Logs

Set to **Yes** to clear logs for all running and completed tasks.

The screenshot shows a 'LOG CLEANER' interface with a blue header. Below it, a section titled '1 Types to Clear' is highlighted in blue. It contains three dropdown menus: 'User Logon Activity' set to 'No', 'Error Logs' set to 'Yes', and 'Task Activity Logs' set to 'No'.

When you change any of the default settings in the **Types to Clear** section, the **Execute Clear Logs Data Management Sequence** section of the Log Cleaner appears. Click **Execute** to clear logs based on the selected criteria.

## Select Application and/or User

The second step in the log clearing process is to select specific users and applications whose log entries you want cleared.

Log Cleaner allows administrators to select custom filtering to clear the Error Log based on specific text.

Use the fields to clear logs based on application, user, and text in the log.

### Application

Clear logs for a specific application or all applications.

### User

Clear logs for an individual user or all users in the environment.

### Error Description Contains (optional)

## Clean Unneeded Log Entries

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Enter a text string from a log error to clear logs that use the string. The string must match exactly.

2 Application and/or User

|                            |   |
|----------------------------|---|
| Application                | <input type="text" value="All"/>              |
| User                       | <input type="text" value="AST_Admin"/>        |
| Error Description Contains | <input type="text" value="ClearLogs810_AST"/> |

## Select Days to Retain

The third step in the log cleaning process is to determine how many days of error logs should be retained after the current log clearing executes.

### Days to Retain

Use this field to set the number of days error logs are retained after the current log clearing executes.

Select a value between 30 and 810 days. For example, if set to 90, all qualified error records older than 90 days are cleared.

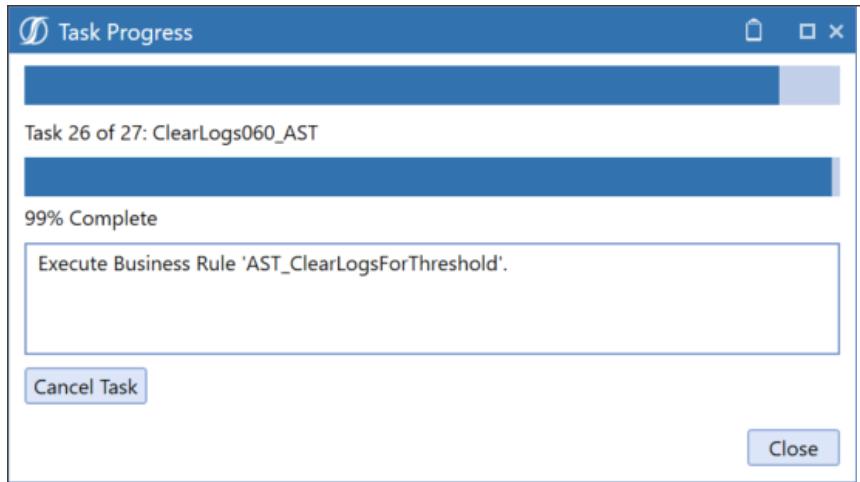
3 Days to Retain

|                |                                 |
|----------------|---------------------------------|
| Days to Retain | <input type="text" value="90"/> |
|----------------|---------------------------------|

# Execute Clear Logs Data Management

To clear logs, select log clearing criteria and the number of days to retain log records, and then click **Execute**.

The Log Cleaner displays cleaning tasks as they execute. If needed, click **Cancel Task** to stop the log clean process. Click **Close** when cleaning completes.



# Log Analysis Page

The Log Analysis page provides a graphical user interface to review OneStream logs.

The page includes the following tabs that provide details on OneStream logs

### Log Size

This tab shows the size of each log table by type (in megabytes) in a pie chart. Log types that display are:

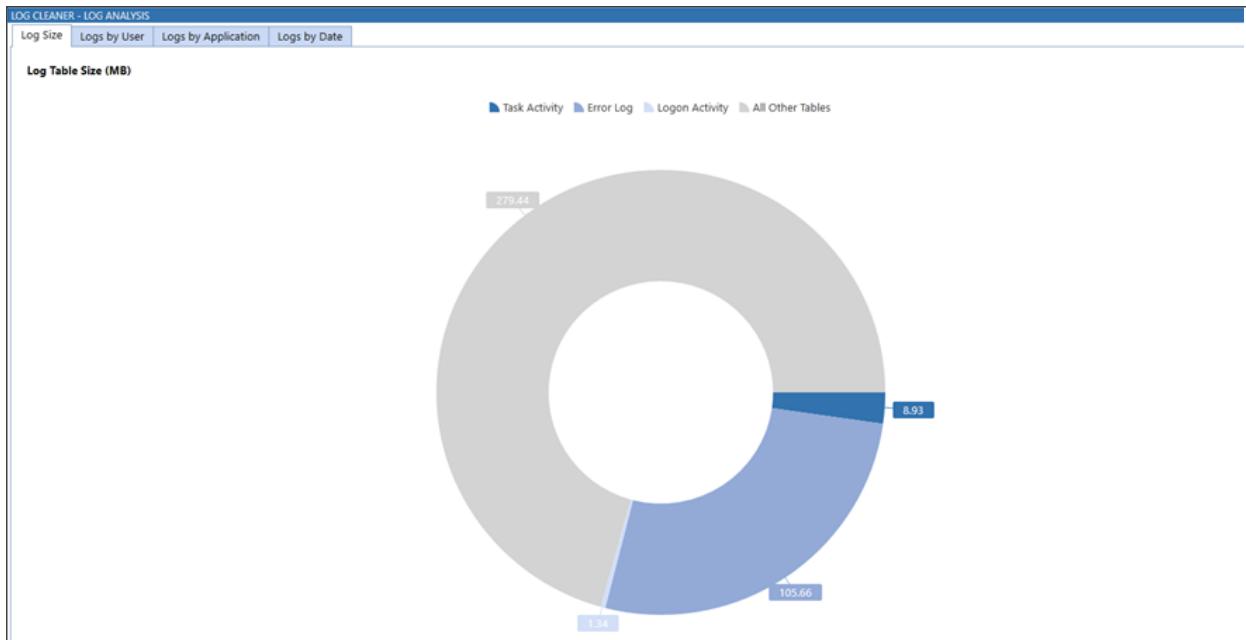
- Task Activity
- Error Log

## Clean Unneeded Log Entries

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- Logon Activity
- Logs from all other tables

Use the information to help determine which logs you want to clear. In the following graphic, the All Other Tables log table contains the bulk of retained log entries, representing a potential place to focus a log clearing process.



### Logs by User

This tab contains a bar chart showing the users with the most retained log activity. Bars on the chart are color-coded, so you can see details on the exact number of task activity, error log, and logon records for each user. Use this chart to quickly see which users you may want to focus on for your log clearing process.

### Logs by Application

This tab contains a bar chart showing log entries by log type for each application. Bars on the chart are color-coded, so you can see details on the exact number of task activity,

## Clean Unneeded Log Entries

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error log, and logon records for each application. Use this chart to see the applications you may want to focus on for your log clearing process.

### Logs by Date

This tab contains a bar chart showing the number of log entries by log type based on the amount of time the records have been retained. Bars on the chart are color-coded, so you can see details on the exact number of task activity, error log, and logon records for each.

Use the dropdown to select a monthly, quarterly, semi-annual, or whole year retention period. Use this chart to see retention periods with the most log entries of each type.

# **Help and Miscellaneous Information**

## **Display Settings**

OneStream Solutions frequently display multiple data elements for proper data entry and analysis. We recommend you set your screen resolution to 1920 x 1080 to best render forms and reports. Also, adjust the Windows System Display Text setting to 100% and do not apply 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:** AST\_PV7.4.0\_SV101\_PackageContents.zip

| <b>Identifier</b> | <b>Description</b>                                |
|-------------------|---|
| AST               | Solution ID                                       |
| PV7.4.0           | Minimum Platform version required to run solution |
| SV101             | Solution version                                  |
| PackageContents   | File name   |

## 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. After 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 may overwrite existing table data in the production application database if data already exists.

# OneStream Solution Modification Considerations

A few cautions and considerations regarding modification of OneStream Solutions:

- Major changes to business rules or custom tables within a OneStream 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 OneStream 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 OneStream 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.