onestream

File Explorer Manager Guide

PV6.5.0 SV102

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File Explorer Manager Guide

Release: PV650 SV102

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 6.5.0 or later	Minimum OneStream Platform version required to install this version of File Explorer Manager.

Select the File Explorer Manager Development Location

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

Production OneStream Application: The primary advantage of building the solution in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity and it is not advised.

> **NOTE:** OneStream strongly recommends that you implement the solution in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream Application: As a best practice, use the Development OneStream application to build the solution.

Create the OneStream Development Environment

1. Ensure all the OneStream artifacts relating to File Manager Explorer such as **Workflow Profiles** and **Entities** are in the Production application.
2. Copy your Production application to your Development environment and rename it. Use the development version for your File Manager Explorer solution.

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

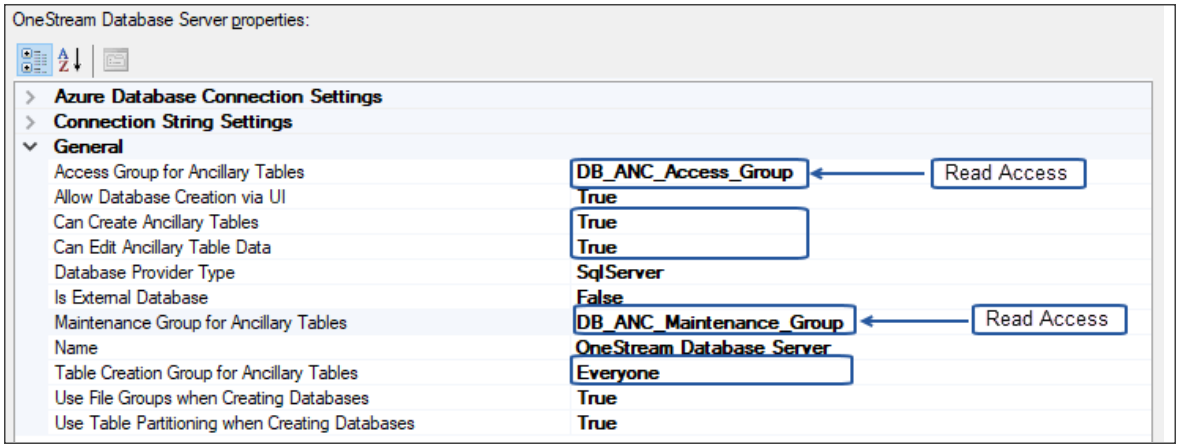
Configure the OneStream Application Server

Be sure that the security group settings include the users who work on and set up the solution before proceeding.

NOTE: Group settings are applicable to all OneStream Solutions; it is important to keep the group names generic.

1. Start the OneStream Server Configuration Utility as an Administrator.
2. Click **Open Application Server Configuration File > Database**.
3. Edit the following **OneStream Database Server properties**:

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



4. Restart Internet Information Server.

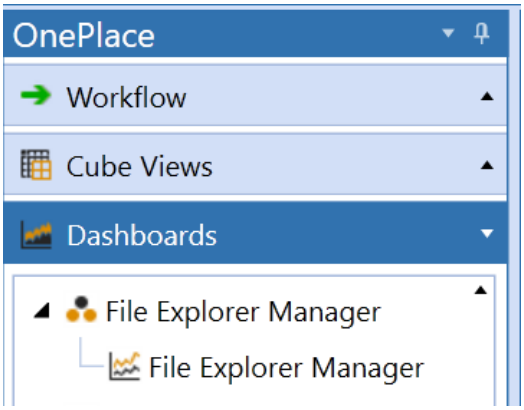
Install File Explorer Manager

1. In the OneStream Solution Exchange, go to **OneStream Solutions** > **File Explorer Manager**.
2. On the File Explorer Manager 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** icon and click **Open**.
7. When the solution's file name appears, click **Load**.
8. Click **Close** to complete the installation.

Set Up File Explorer Manager

The first time you run File Explorer Manager you will be guided through the table setup process:

- In OneStream, click **Community Solution**> **Dashboards** > **File Explorer Manager** > **File Explorer Manager**



Create Tables and Launch Solution

The first time you run this solution, you are directed to the File Explorer Manager Setup screen.

> **NOTE:** Before running the setup, ensure that the account being used to access SQL server has table creation rights on the SQL database to create the custom tables.

The first step of the setup creates all tables required for File Explorer Manager.

1. Click **Step 1: Setup Tables**
2. When setup is complete, click **Step 2: Launch Solution** to open File Explorer Manager.

Package Contents

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

It is not recommended to rename any included Dashboard, dimension, member, etc. unless specified.

The following Business Rules are included:

FEM_HelperQueries: A Dashboard Data Set business rule. This rule provides helper queries for listings and reporting statistics used to create the dashboards and provide activity log functionality.

FEM_SolutionHelper: A Dashboard Extender business rule that provides various helper functions for the File Explorer Manager solution. These helper functions include management of the solution setup, configuration settings, file manipulation, and other key user interactions in the solution.

FEM_ParamHelper: A Conditional Parameter helper functions XFBR String business rule. This rule is used to provide conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

FEM_SharedHelper: A common library of functions and properties that are shared between the other three business rules. This allows for more consistency throughout the solution code and the ability to reuse commonly used functions and properties.

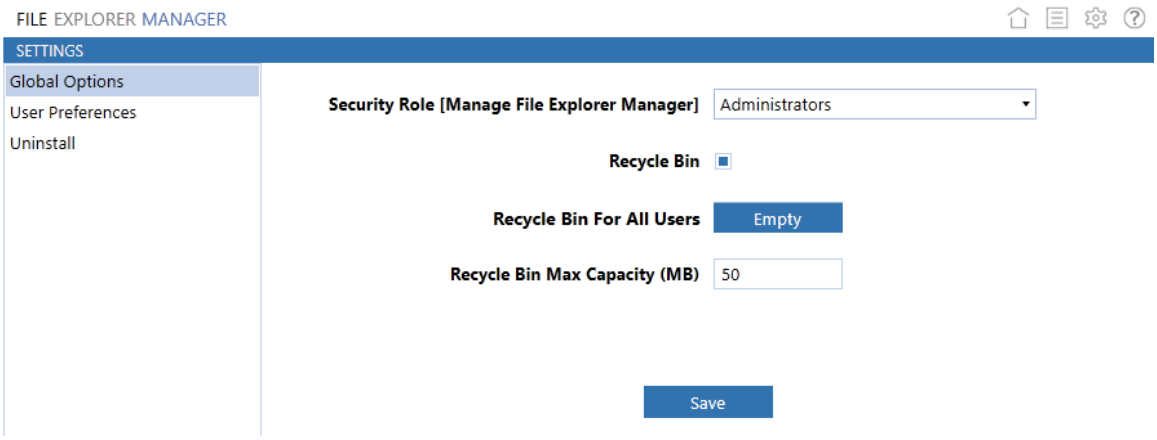
The following database tables are included:

- XFW_FEM_Artifact
- XFW_FEM_ArtifactType
- XFW_FEM_Batch
- XFW_FEM_ControlLists
- XFW_FEM_FileContent
- XFW_FEM_FolderFeatures

- XFW_FEM_History
- XFW_FEM_Operation
- XFW_FEM_Process
- XFW_FEM_Recycle
- XFW_FEM_SystemLocation

Settings

The Settings page contains the Global Options tab in which key properties that guide File Explore Manager administration are set as well as User Preferences and Uninstall options.



Global Options

The **Global Options** tab allows administrators to:

- Assign a security group to manage File Explorer Manager
- Toggle on/off recycle bin functionality
- Empty the recycle bin of all users
- Assign a recycle bin maximum capacity

Security Role [Manage File Explorer Manager]: This assigned security group permits access to the **Global Options** settings, **Uninstall** page, and **Activity Log**. The default value for this role is assigned to administrators. If a group lacking administrative

permissions is assigned to the Security Role [Manage File Explorer Manager], members of that group will be limited to viewing their respective user folders and will be unable to restore to folders where they lack the permission to write.

Recycle Bin: The recycle bin defaults to off. When toggled off, deleted files and folders will be permanently deleted. If toggled on, deleted files and folders will be sent to the recycle bin granted they do not exceed the recycle bin max capacity.

Recycle Bin for All Users: Clicking the **Empty** button will prompt the user to confirm that they want to purge all user recycle bins. This action is permanent. Additionally, the recycle bins can be emptied using the recycle bin buttons on the main page. These buttons will display based on whether recycle bins are enabled as well as user permissions.

Recycle Bin Max Capacity (MB): Administrators can set a maximum individual recycle bin size. Once this threshold is exceeded, files and folders will be permanently deleted rather than sent to their respective recycle bin. The recycle bin max capacity defaults to 50 MB and cannot be set to exceed 500 MB.

User Preferences

User preferences are settings that are specific to individual users.

User Time: Users can customize the time zone they want to display while using File Explorer Manager. The default setting is UTC.

The following shows the default time stamp (UTC) in the **Time Created** and **Time Modified** columns in the File Explorer Manager file grid.

Files	Description	File Type	Access Group	Maintenance Group	Time Created (UTC)	Time Modified (UTC)
CeoPOV.xml		Pov	Everyone	Everyone	3/24/2022 4:09:19 PM	3/24/2022 4:09:19 PM
Cube Views.xml		CubeViewsShortcut	Everyone	Everyone	3/2/2022 2:15:21 AM	3/2/2022 2:15:21 AM
Cube Views_2.xml		CubeViewsShortcut	Everyone	Everyone	2/7/2022 2:36:11 PM	2/7/2022 2:36:11 PM
Cube Views_2_2.xml		CubeViewsShortcut	Everyone	Everyone	3/24/2022 5:19:38 PM	3/24/2022 5:19:38 PM
HoustonPOV.xml		Pov	Everyone	Everyone	3/24/2022 4:08:57 PM	3/24/2022 4:08:57 PM
HoustonPOV_2.xml		Pov	Everyone	Everyone	3/24/2022 5:19:38 PM	3/24/2022 5:19:38 PM

Daylight Savings: Select this box to automatically adjust File Explorer Manager user time for daylight savings time. Times do not adjust unless this box is selected.

My Recycle Bin: Click **Empty** to permanently delete the files in your recycle bin. The number in parentheses shows the total number of files currently in the recycle bin.

Uninstall

The **Uninstall** tab allows administrators to uninstall the File Explorer Manager user interface or the entire solution.

> **NOTE:** If performed as part of an upgrade, any modifications made to the standard File Explorer Manager objects are removed.

There are two uninstall options:

- **Uninstall UI** removes File Explorer Manager, including related dashboards and business rules, but leaves the database and related tables in place. Some Global Options will also be cleared because their values are stored in Parameters under Dashboards.
    - Choose this option to accept a File Explorer Manager update without removing the data tables.
    - The *Release Notes* indicate if an overinstall is supported.

- **Uninstall Full** removes all the related data tables, all data, File Explorer Manager dashboards, and related business rules.
    - Choose this option to completely remove File Explorer Manager or to perform a significant update (e.g., database changes or major bug fixes).

> **NOTE:** The File Explorer Manager tables are stored on the application database. Removing these tables also removes all related File Explorer Manager data for all applications using the same Framework. This will have no affect on files located in OneStream's native File Explorer unless they have been moved to the File Explorer Manager recycle bin.

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

Use File Explorer Manager

This section focuses on key features of File Explorer Manager and how you can maximize use of the solution.

Recycle Bin

In File Explorer Manager, the recycle bin is a directory where deleted items are temporarily stored. When enabled, deleted files or folders are sent to the recycle bin as long as their addition does not exceed the maximum capacity limit. If artifacts exceed the maximum capacity, you are prompted to permanently delete these files or cancel the action.

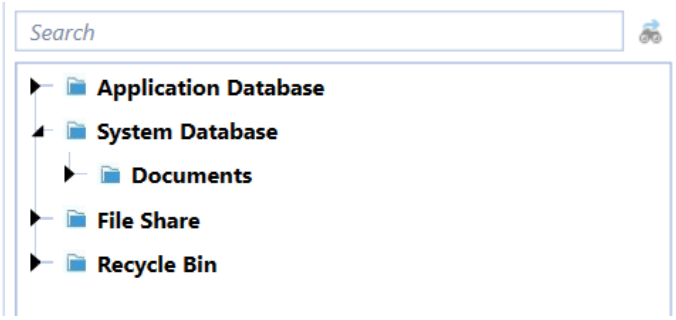
Restore from the Recycle Bin

The recycle bin helps prevent files and folders from being accidentally deleted. When the recycle bin is enabled, File Explorer Manager sends files and folders to the recycle bin where they can be restored.

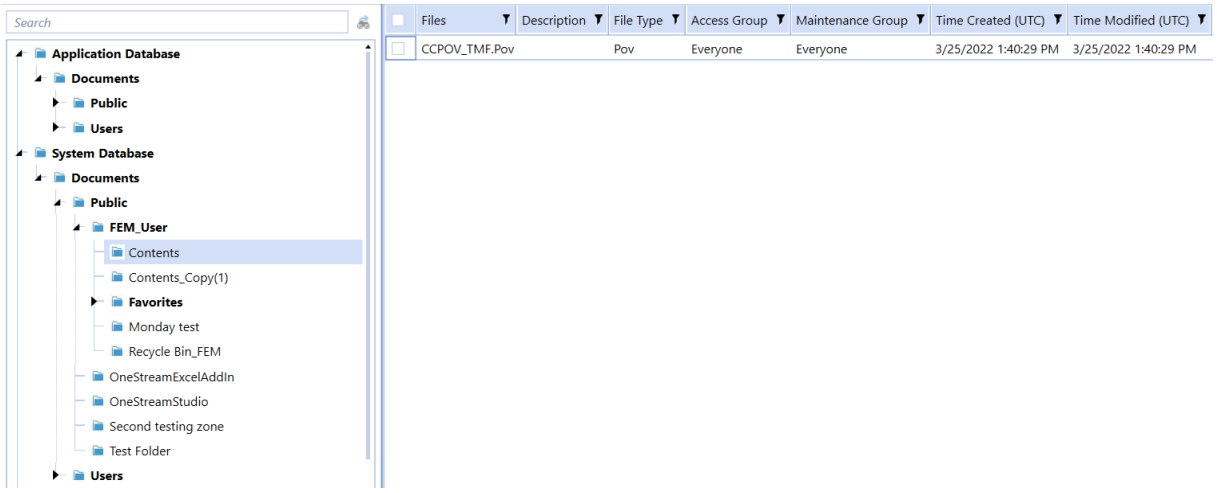
> **IMPORTANT:** If a file is purged from the recycle bin it is permanently deleted and cannot be recovered.

Navigate the Folder Structure

To navigate through the folder tree view, click the arrow to the left of the folder name you want to expand. Bold folder names indicate underlying folders.

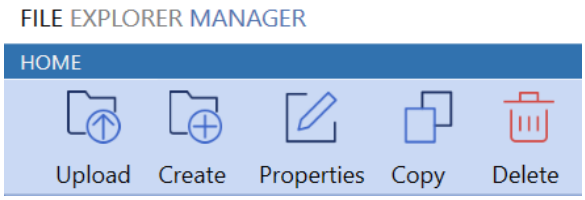


Click on a folder to view its contents in the files grid view.


Search
Application Database
Documents
Public
Users
System Database
Documents
Public
FEM_User
Contents
Contents_Copy(1)
Favorites
Monday test
Recycle Bin_FEM
OneStreamExcelAddIn
OneStreamStudio
Second testing zone
Test Folder
Users
Files
Description
File Type
Access Group
Maintenance Group
Time Created (UTC)
Time Modified (UTC)
CCPOV_TMF.Pov
Pov
Everyone
Everyone
3/25/2022 1:40:29 PM
3/25/2022 1:40:29 PM

Folder Actions

Relevant folder action buttons are displayed based on the folder selected.



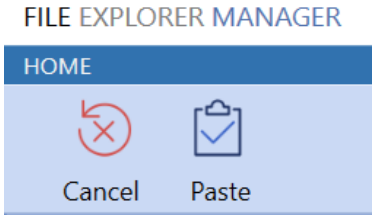
Upload File: Displays a dialog box from which you can select a file for upload to the selected destination folder.

Create New Folder: Displays a dialog box from which you can create a new folder in the selected destination folder. You are prompted to enter a new folder name, description, access group, and maintenance group.

Folder Properties: Displays a dialog box from which you can view and modify folder properties. Editable fields include description, access group, and maintenance group.

> **NOTE:** The ability to edit access group and maintenance group is based on OneStream user and group security settings. The properties feature is unavailable in File Share.

Copy: Stores the copied contents in the clipboard. The Paste and Cancel buttons become visible when you click Copy.



Paste: After clicking Copy, select the destination folder and click Paste. If you select a folder to which you do not have write permission, the Paste button is hidden.

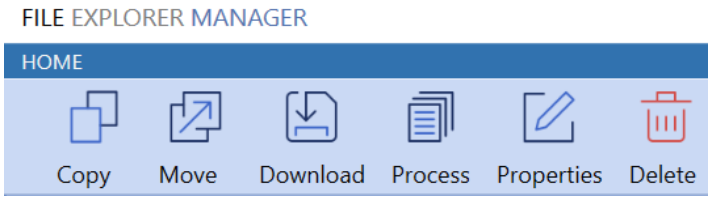
Cancel: Cancels the copy action and displays the standard file action buttons.

Delete Folder: When the recycle bin is enabled, deleting a folder sends the folder and its contents to the recycle bin. If deleting a folder will exceed the recycle bin's maximum capacity, you are prompted to permanently delete the folder and its contents.

When recycle bin is disabled, deleting a folder permanently deletes the folder and its contents. A dialog box will prompt you to confirm or cancel the operation.

File Actions

Relevant action buttons are displayed based on the file(s) selected.



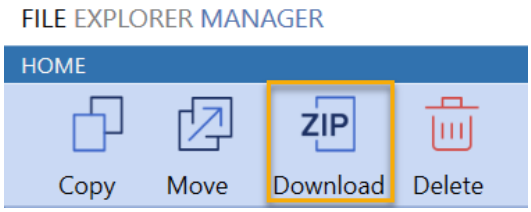
Copy/Move: To copy or move files you must first select the files you want to move. The Paste and Cancel buttons become visible after clicking Copy/Move.

Paste: If you select a folder to which you do not have write permission, the Paste button is hidden.

Cancel: Cancels the copy/move action and displays the standard file action buttons.

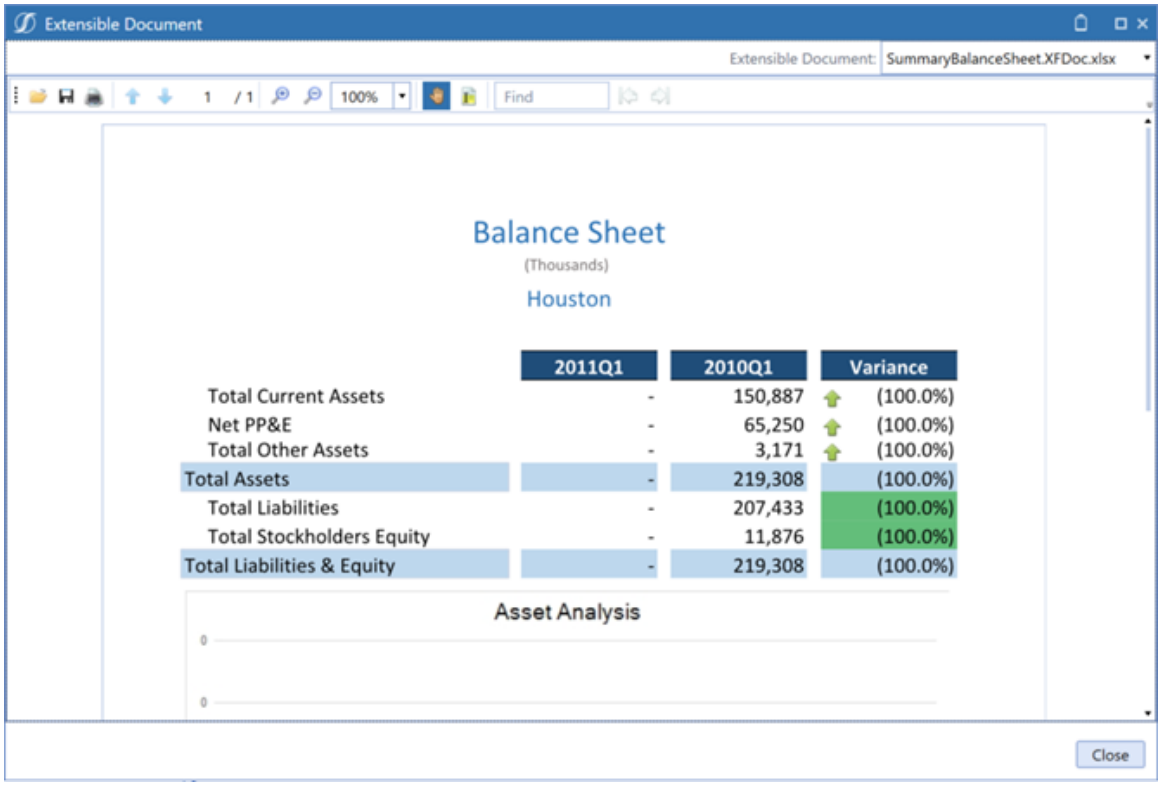
Download: When you select a single item, the Download button becomes visible. Clicking the download icon from the desktop client opens the selected file. Clicking the download button from the web client presents a download file dialog box.

Download (Zip): If you select multiple items, the Download button changes to a Zip button, which creates a zip file with the selected files. From here you can choose to extract the files to your desktop, open one file at a time, or save the zip file.



Process (OneStream File Types): OneStream files, such as POV and shortcuts, are meant to perform specific actions in OneStream and can only be processed one at a time.

Process (Extensible Documents): You can process Extensible Documents by selecting and clicking the Process button. Multiple Extensible Documents can be processed at once. When you click the Process button, you are prompted to enter the parameters for the first file selected. After populating parameters, a new dialog window opens displaying the Extensible Document. In the top right of the dialog window, a combo box allows you to toggle between all extensible documents if multiple were selected for processing.

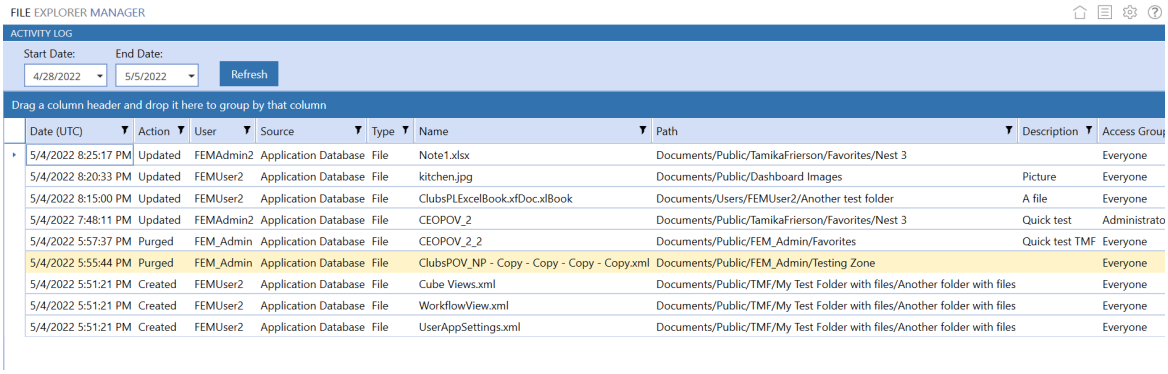


Activity Log

The Activity Log page is available to administrators and users assigned the Manage File Explorer Manager security role.

Data in the Activity Log can be filtered, sorted, rearranged, and exported.

> **NOTE:** The Activity Log only tracks actions performed within the File Explorer Manager solution. Actions taken outside of File Explorer Manager (for example, from the OneStream integrated File Explorer, Windows File Explorer) are not captured.



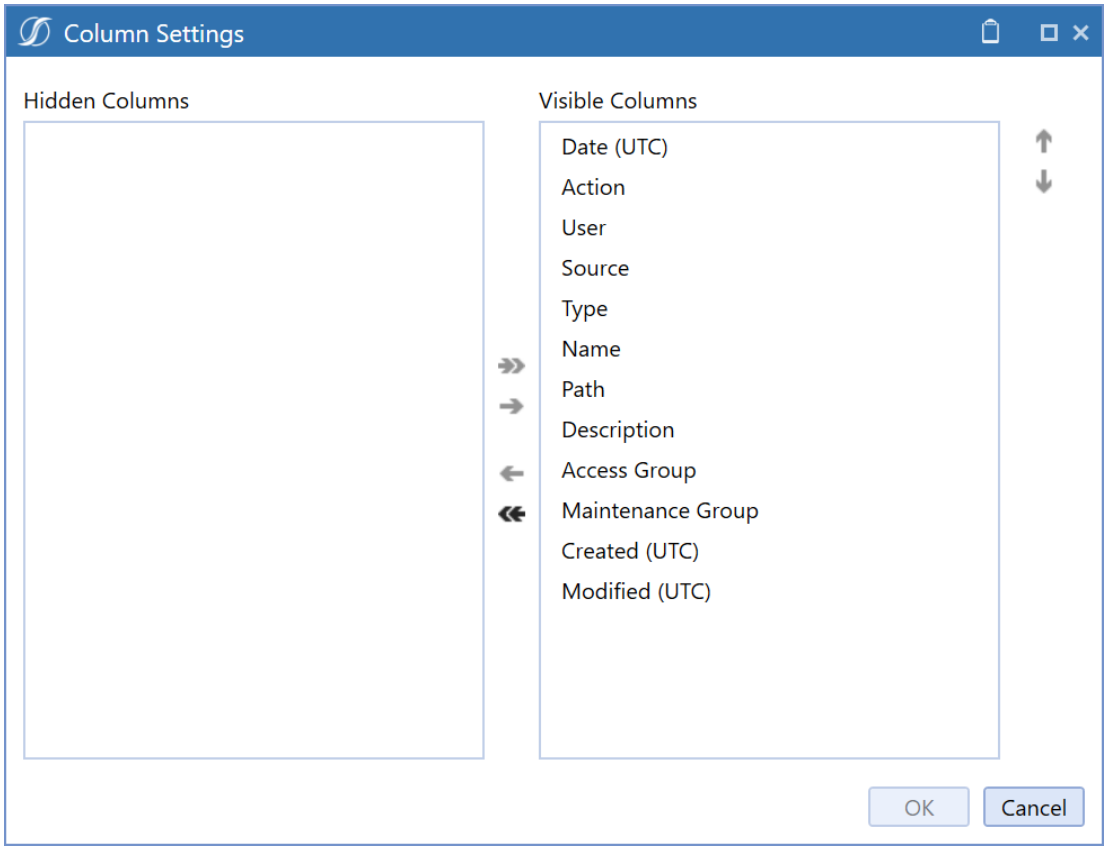
Date (UTC)	Action	User	Source	Type	Name	Path	Description	Access Group
5/4/2022 8:25:17 PM	Updated	FEMAdmin2	Application Database	File	Note1.xlsx	Documents/Public/TamikaFrierson/Favorites/Nest 3		Everyone
5/4/2022 8:20:33 PM	Updated	FEMUser2	Application Database	File	kitchen.jpg	Documents/Public/Dashboard Images	Picture	Everyone
5/4/2022 8:15:00 PM	Updated	FEMUser2	Application Database	File	ClubsPLExcelBook.xfDoc.xlBook	Documents/Users/FEMUser2/Another test folder	A file	Everyone
5/4/2022 7:48:11 PM	Updated	FEMAdmin2	Application Database	File	CEOPOV_2	Documents/Public/TamikaFrierson/Favorites/Nest 3	Quick test	Administrato
5/4/2022 5:57:37 PM	Purged	FEM_Admin	Application Database	File	CEOPOV_2_2	Documents/Public/FEM_Admin/Favorites	Quick test TMF	Everyone
5/4/2022 5:55:44 PM	Purged	FEM_Admin	Application Database	File	ClubsPOV_NP - Copy - Copy - Copy - Copy.xml	Documents/Public/FEM_Admin/Testing Zone		Everyone
5/4/2022 5:51:21 PM	Created	FEMUser2	Application Database	File	Cube Views.xml	Documents/Public/TMF/My Test Folder with files/Another folder with files		Everyone
5/4/2022 5:51:21 PM	Created	FEMUser2	Application Database	File	WorkflowView.xml	Documents/Public/TMF/My Test Folder with files/Another folder with files		Everyone
5/4/2022 5:51:21 PM	Created	FEMUser2	Application Database	File	UserAppSettings.xml	Documents/Public/TMF/My Test Folder with files/Another folder with files		Everyone

Actions tracked within the Activity Log include:

- Created
  - File Uploaded
  - Folder Created
  - File Pasted
  - Folder Pasted
- Updated
  - File Properties Modified
    - Description
    - Access Group
    - Maintenance Group
  - Folder Properties Modified
    - Description
    - Access Group
    - Maintenance Group

- Deleted (Recycled)
    - File Recycle
    - Folder Recycled
    - File Moved
- Restored
    - File Restored
    - Folder Restored
- Purged (Permanently Deleted)
    - File Permanently Deleted
    - Folder Permanently Deleted

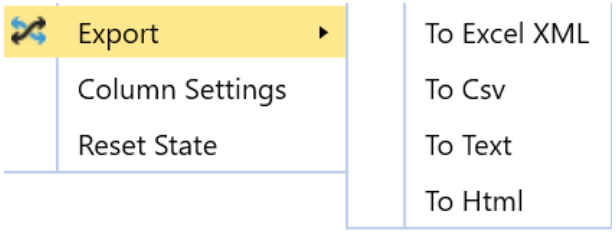
Column Settings: Column settings can be configured by right-clicking the grid and selecting Column Setting. Columns can be rearranged and hidden or displayed as needed.



Reset State:Right-click the grid and select **Reset State** to restore column settings to their default.

Export: To export the grid list, right-click the grid, select **Export**, and select one of the export options below:

- To Excel XML
- To CSV
- To Text
- To HTML



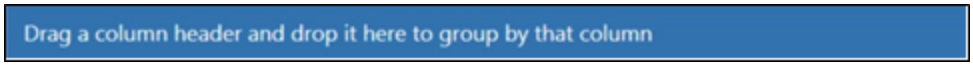
> **NOTE:** The Export feature only exports the information shown in the grid. This feature does not download files. For more information on downloading files, see the Folder Actions section.

Manage Grid Items

File Explorer Manager provides several features that let you group, filter, and display the data, items, and columns in the grid.

Group Grid Items

Column headers can be grouped together by dragging and dropping selected headers to the dark blue bar above the column headers.



Column groupings are updated and displayed as soon as the column is dropped into the bar. When more than one group is used, they will display as nested within higher-level grouping.

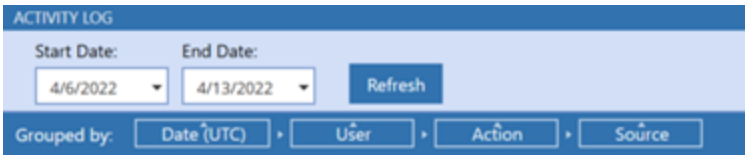
Expand or collapse grouped items by clicking the **Expand** and **Collapse** widgets on the top left of each grouping.

Any column groupings you make are retained between File Explorer Manager sessions. Groupings remain until they are changed or removed.

To remove a grouping, hover over the column group you want to remove, then click the **X** that appears in the group box. You can also click the column group header in the **Grouped by** bar and drag it anywhere outside of the bar to remove it. Removing all groupings restores the list to its original state.

You can also change the list of items within groupings between ascending order and descending order by clicking the ascending/descending widget on the top of the column box.

When sorting grid items by multiple groups, you can easily change grouping hierarchy by dragging and dropping a grouping box to the desired level.



Filter Items Displayed in a Grid

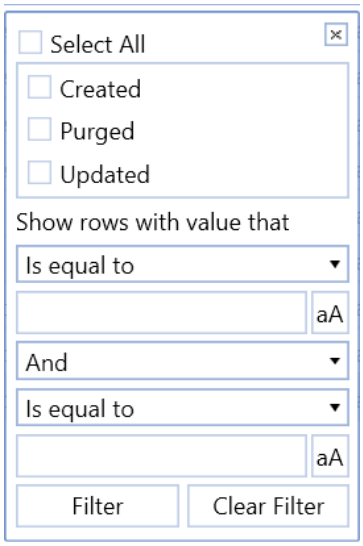
You can use filters in grids to display a subset of the grid's items. This is useful when working with many items because it allows you to focus on the specific items you need to

work with.

Column ordering is remembered and retained from session to session until changed.

Any grid with columns that include the Filter button in the column header lets you use filtering criteria to display the items that meet the defined criteria.

Click the Filter button to display the Filter Criteria dialog.



Select the items to include in the filter. Options are based on specific item values available in the selected column. You can select all items, specific items, or a single item for filtering.

Click Filter to apply the filter to the selected task group or task list.

Reorder Grid Columns

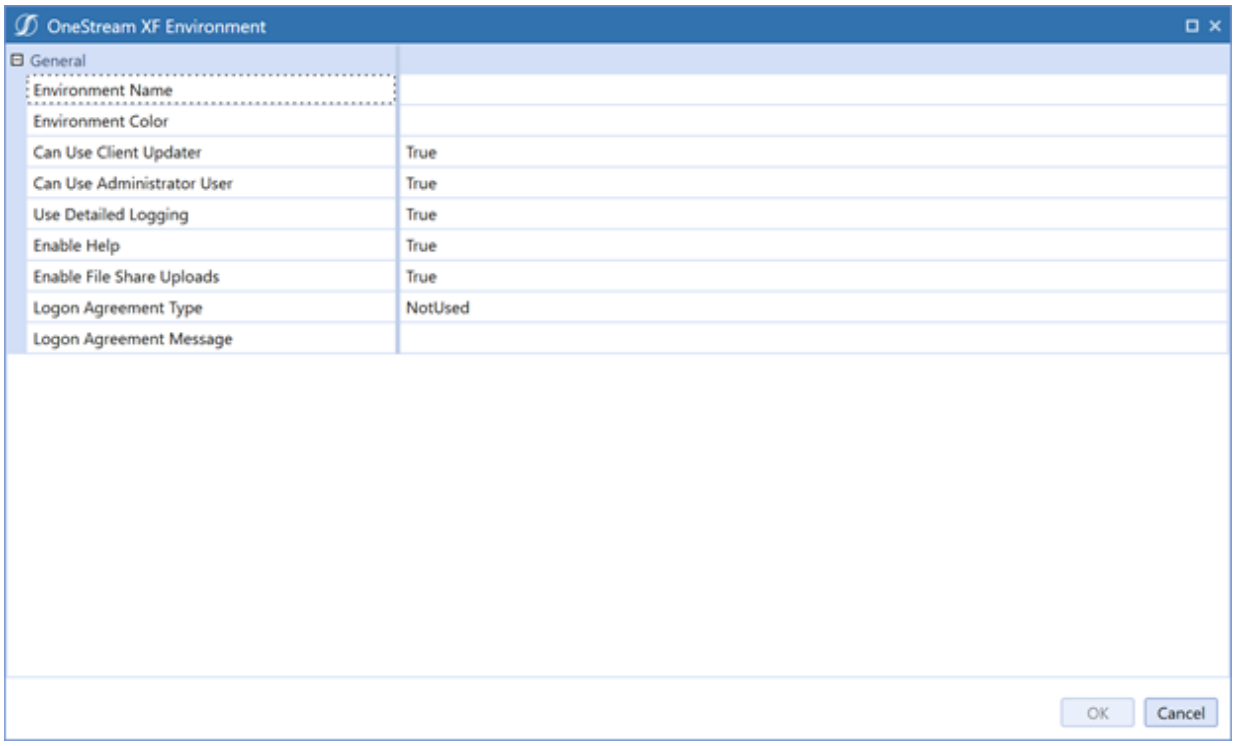
Columns in a file grid or report can be moved to customize the order in which they display. This lets you move the most important columns to the visible area of the grid so you don't have to scroll to see those columns.

To reorder a column in a grid, click and drag the heading of the column to the desired position in the grid.

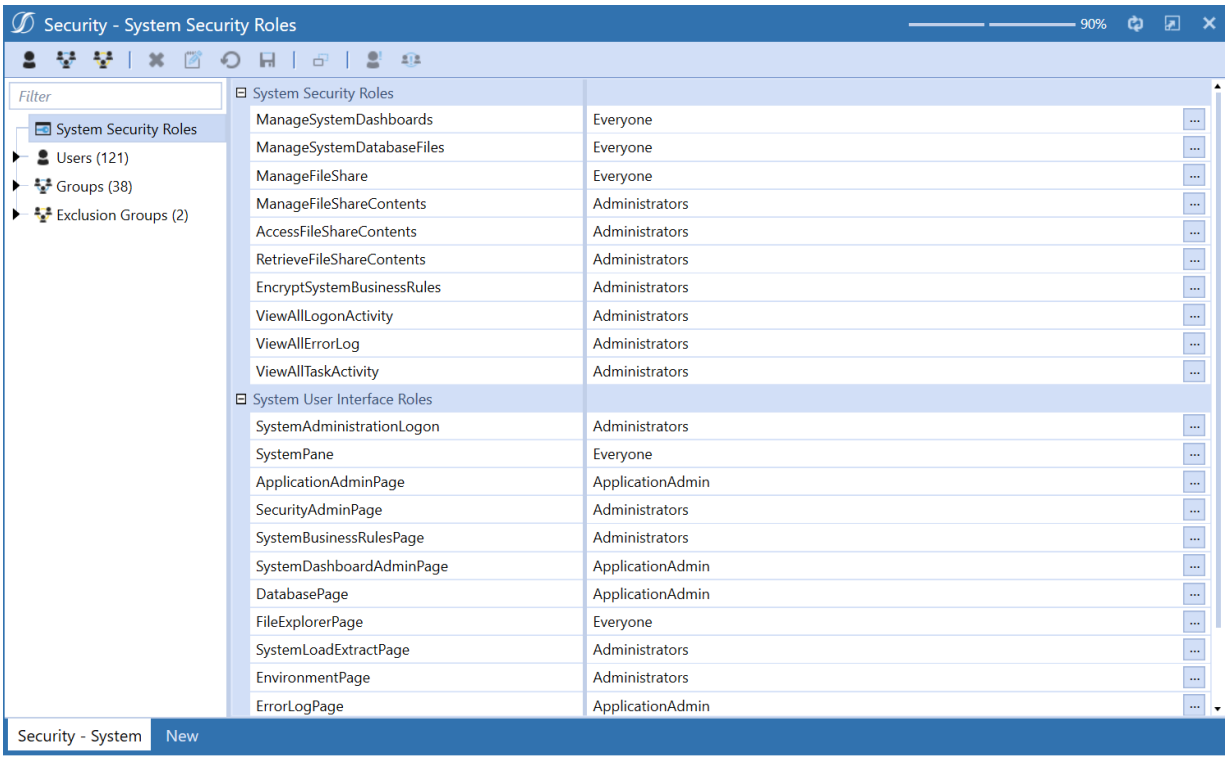
File Share Considerations

If the File Explorer Manager solution has more than 1000 file share folders, you may experience performance issues with longer than normal wait times. .

Enable/Disable File Share Uploads: Enable or disable File Share uploads by going to **OneStream Server Configuration Utility** > **File** > **Open Application Server Configuration File** > **OneStream Environment** > **Click Ellipsis** > **Enable File Share Uploads**.



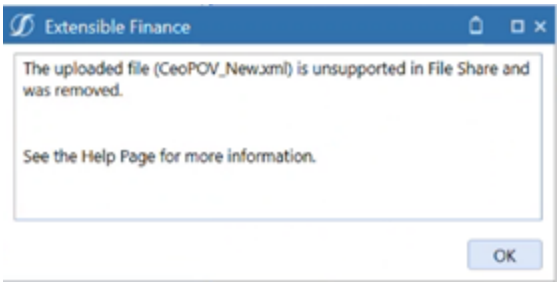
System Security Roles: File Share specific security roles can be configured by going to **System** > **Security** > **System Security Roles**.



Access Group, Maintenance Group, and Description: Due to limitations in File Share, moving and copying files or folders from the application or system databases to File Share causes access group, maintenance group, and description to be lost.

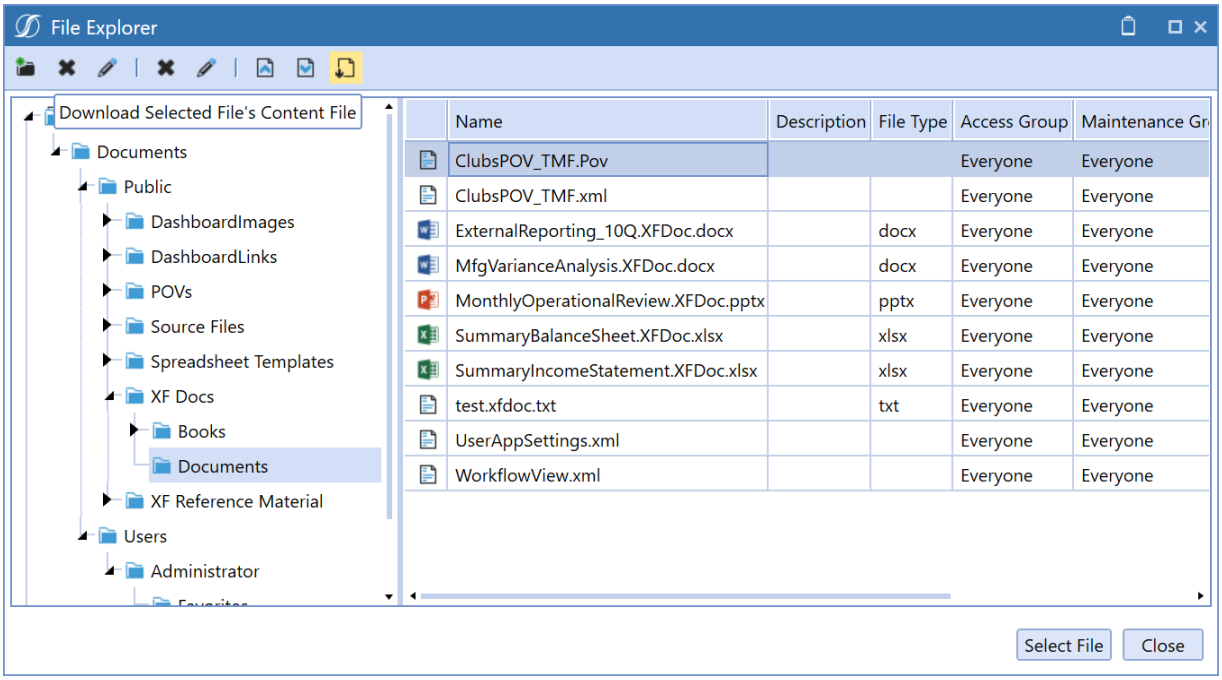
Uploading OneStream XML File Types to File Share: OneStream XML file types (for example, POV, Workflow POV, Shortcuts, Application Settings) cannot be uploaded directly to File Share.

If you encounter the error below, you must re-upload the OneStream XML file type to the application or system database, then copy or move the file to File Share.



Downloading Extensible Documents to File Share: When downloading Extensible Documents from the application and system databases directly to File Share, you must use the Download Selected File's Content File button for it to be supported in File Share. Extensible Documents downloaded using the Download Selected File button are saved in an unsupported format for File Share usage.

If you encounter an error stating that your Extensible Document is in an unsupported format, you must re-download the Extensible Document from File Explorer using the Download Selected File's Content File button.



File Explorer Manager Best Practices

Save and Close Zip Files: If you download files to a zip and do not close that zip before attempting to download again, you will receive an error message. Always save and close open zip folders before attempting to download files to zip again.

Security Group [Manage File Explorer Manager] Role Considerations: The assigned security group will need to be added as a child to the administrators group to see the full set of user folders. If an assigned group lacks administrator permissions, the assigned group will still be able to manage recycle bin functions. However, they will not be able to see individual user folders and will be restricted to viewing only their own user folder. If an assigned group does not have write permissions in user folders, they will be unable to restore files to those folders.

Help and Miscellaneous Information

This page contains solution documentation.

Display Settings

OneStream Solutions frequently display multiple data elements for data entry and analysis. Therefore, set your screen resolution to a minimum of 1920 x 1080 to optimally render forms and reports.

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any Custom Scaling options.

Package Contents and Naming Conventions

The package file name contains multiple identifiers that correspond with the platform. Renaming any of the elements contained in a package is discouraged in order to preserve the integrity of the naming conventions.

Example Package Name: FEM_PV6.5.0_SV101_PackageContents.zip

Identifier	Description
FEM	Solution ID
PV6.5.0	Minimum Platform version required to run solution

Identifier	Description
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. Once the development application is created, install the solution and begin design. The following process below will help migrate the solution tables properly.

See also: *Managing a OneStream Environment* in the *Design and Reference Guide*.

OneStream Solution Modification Considerations

A few cautions and considerations regarding the 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.