onestream

Guided Reporting Solution Guide

PV6.0.0 SV103

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Overview

Guided Reporting provides business users with a simple and intuitive report viewing experience.

This solution provides:

- A framework for dynamically integrating customer data content into a report viewer workspace for dashboards or Cube Views as structured within the organization.
- Reports that are tailored to the data available for the specific parameter filters set by the business user across any dimension type.
- The ability to use custom reporting without the need for extra maintenance or duplicating templates.

Watch a tour (4:07).

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.

Dependencies

Component	Description
OneStream 6.0.0 or later	Minimum OneStreamPlatform version required to install this version of Guided Reporting.
OneStreamApp for Windows	Guided Reporting is optimized for the OneStream Application for Windows which has all the functionality as the browser-based version of OneStream.

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.

Configure the OneStream Application Server

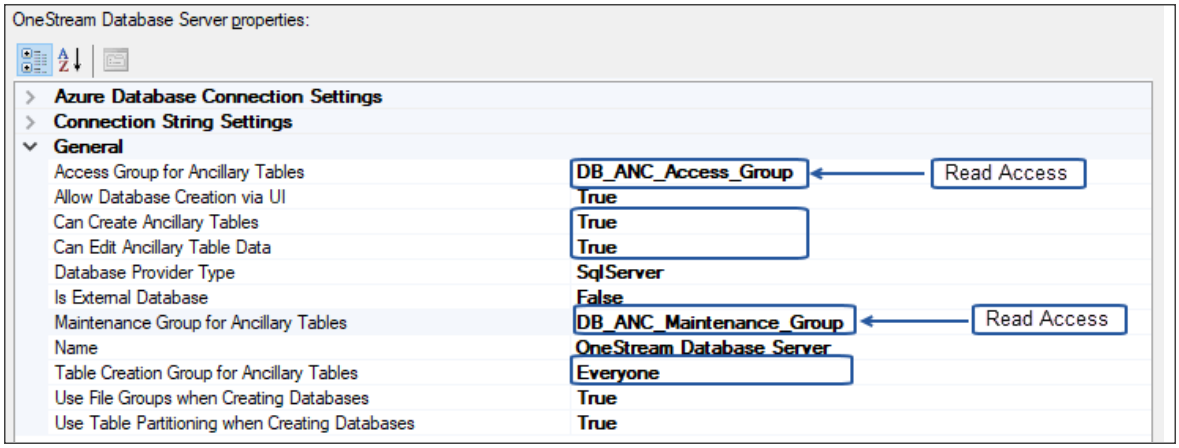
Be sure that the security group settings include the users who work on and set up the solution before proceeding.

> **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 Guided Reporting

> **IMPORTANT:** You must have administrator security level permissions to establish the Guided Reporting setup and reporting options.

1. In the OneStream Solution Exchange, go to **OneStream Solutions** > **Guided Reporting**.

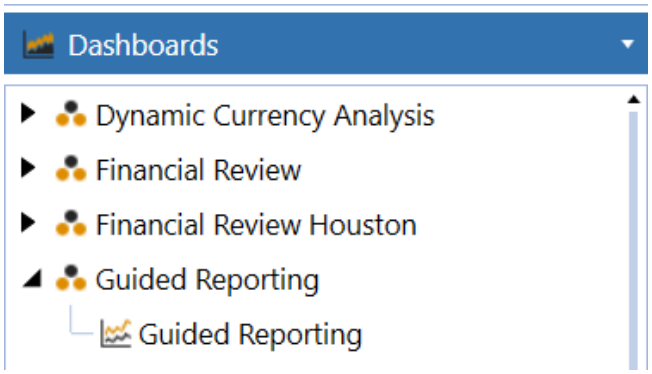
2. On the Guided Reporting solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and click **Download**.

4. Log in to OneStream. On the **Application** tab, click **Tools** > **Load/Extract**.
5. On the **Load** tab, locate the solution package using the **Select File** icons and click **Open**.
6. When the file name of the solution appears, click **Load**.
7. Click **Close** to complete the installation.

Set Up Guided Reporting

The first time you run Guided Reporting, a guided table setup process begins.

In OneStream, click **Community Solution** > **Dashboards** > **Guided Reporting** > **Guided Reporting**.



Create Tables

1. Click **Step 1: Create Tables**
   This step may be necessary when upgrading even if tables already exist. Guided Reporting will not drop tables that already exist but modifies table structures and add new ones if necessary.
2. When setup is complete, click **Step 2: Launch Solution** to open Guided Reporting.

Package Contents

The Dashboard Maintenance unit provides the user interface for Guided Reporting and includes these required dashboard features:

- Components
- Data adapters
- Files
- Groups
- Parameters

Settings

To access the **Settings** page, click **Show Settings Page**.

> **NOTE:** In the Settings page, administrators have access to all functionality while non-administrators can only access User Preferences.

Global Parameters

The Global Options tab allows you to identify which parameters to set up as a Global view within the Global Parameter definition table. By setting global parameters, a Global view bar displays on the Home page that you can use those assigned parameters across multiple Cube View reports.

A global parameter displays on multiple Cube View reports if that parameter is used on that report. You can also set the List Label and the Default Value of the global parameter.

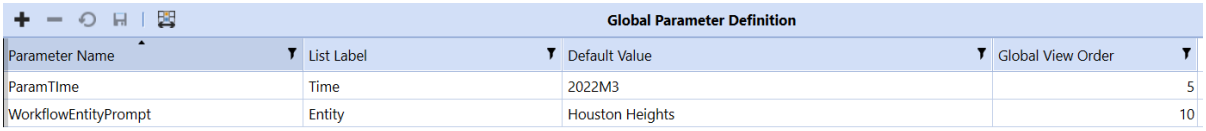
This table shows the change in display for each List Label population:

List Label	Global Parameter Definition Table Display
Blank	Name of the parameter on the home page reflects the parameter name.
Populated	List Label contents overrides name of the parameter

This table shows the change in display for each Default Value population:

Default Value	Home Page Display
Blank	*No Selection*
Populated	Default Value contents

The parameter uses the most recent selection for current and future sessions. After you save, the Parameter Name, List Label, and Default Value columns become read-only. You can edit Global View Order at any time.



Global Parameter Definition

Parameter Name	List Label	Default Value	Global View Order
ParamTIme	Time	2022M3	5
WorkflowEntityPrompt	Entity	Houston Heights	10

Global View Order

Apply the sort order in the Global Parameter Definition table in the **Global View Order** column. The global view order assigned retains its setting on the Home page.

If the Global View Order column is blank, the default sort order for the dimensions is the order of the POV:

1. Cube
2. Entity
3. Parent
4. Consolidation
5. Scenario, and more

When an administrator adds a new parameter in the initial setup or includes additional parameters to an existing list on the Global Definition Table and clicks **Save**, a validation

displays *Changes made to the Global Definition table will be captured during a discover or rediscover process*.

This validation alerts the administrator that any changes made to the Global Definition Table will be available on the Home page of the individual Cube View reports after the Discover process completes. If you ran a Discover process for a Cube View, clicking it again reflects any changes made to parameters in the Cube View itself or in the Global Parameter Table. See Discover Parameters from Cube View Reports.

User Preferences

After you enable the Auto Update feature, the Cube View report updates when each parameter is populated on the Home page.

This feature provides flexibility for interaction with Cube View parameters and report updates on the Home page. It can be modified at any time.

To access the Auto Update feature:

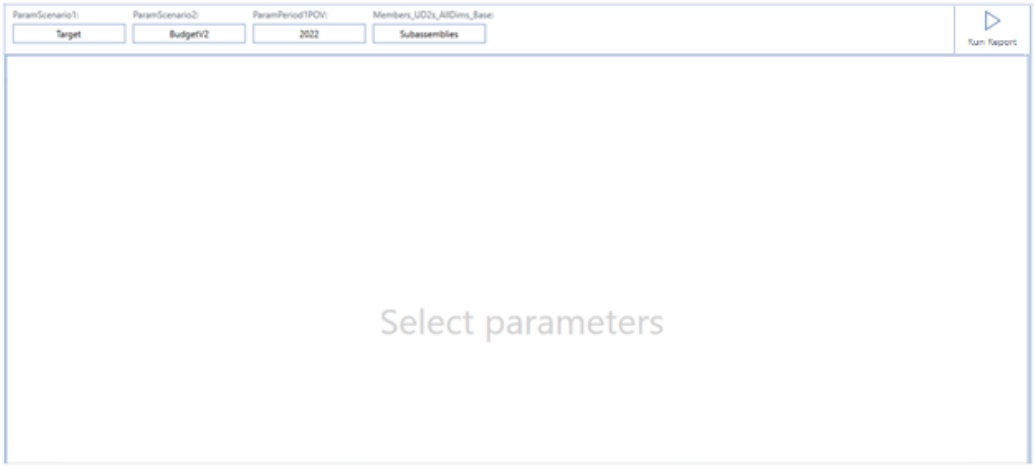
1. On the Settings page, click **User Preferences**.
2. Click **Auto Update Parameter Filters**. This setting is selected by default.

When the Auto Update box is selected, and you are viewing the report for the first time, *Select parameters* text is shown as a reminder to make your selections. When you select the final parameter, the report displays based on your selections.

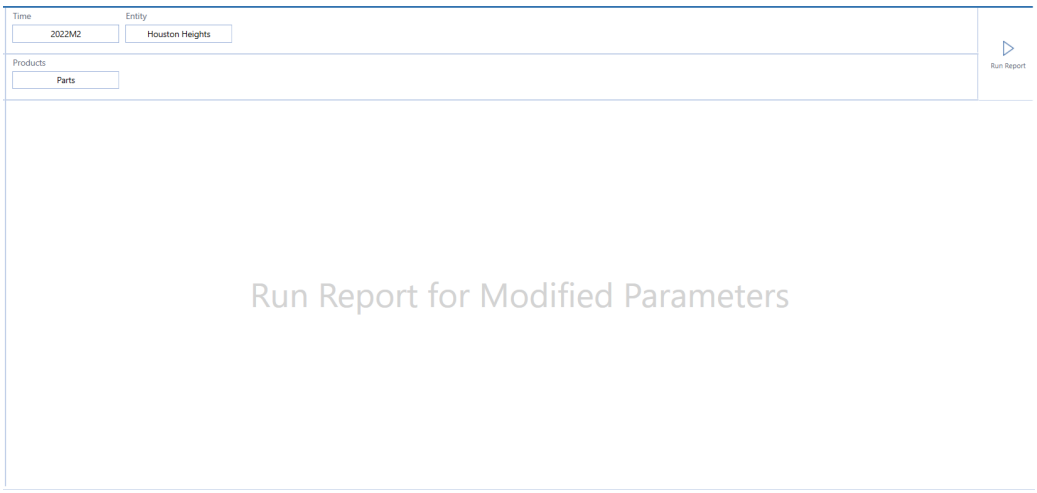
When the Auto Update box is selected and you viewed the report, The Cube View displays using the last filters selected on the parameters.

Home Page Behavior when Auto Update is Disabled

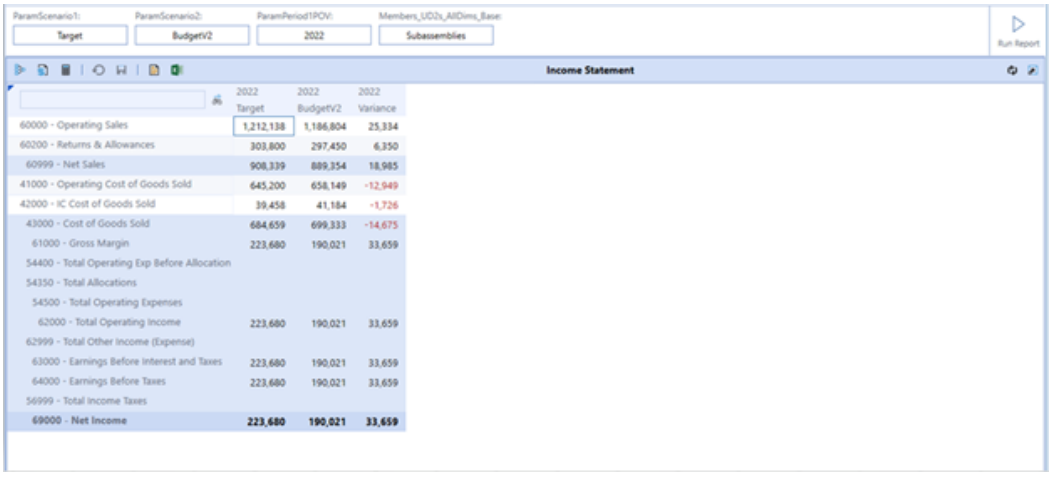
When the Auto Update box is unchecked, a Run Report button displays in the Selector List view on the Home page. When viewing the report for the first time, *Select parameters* displays in gray text below the parameters as a reminder to make your selections.



After the initial run, if additional changes are made to the parameters, gray text displays *Run Report for Modified Parameters* where the Cube View was.



This is a reminder to run the changes after all filters are populated. When you click **Run Report**, the Cube View displays with the updates to the parameter filters.



Uninstall

Uninstall allows you to uninstall the Guided Reporting user interface or the entire solution.

There are two uninstall options:

1. **Uninstall UI** removes Guided Reporting, including related dashboards and business rules, but leaves the database and related tables in place. For some releases, perform this step before accepting any new version of Guided Reporting because dashboards or other objects may have been modified.
    - Select this option to accept a Guided Reporting update without removing the data tables.
    - The Guided Reporting Release Notes indicate if you can reinstall over the existing installation.
2. **Uninstall Full** removes all related data tables, data, Guided Reporting dashboards, and Business Rules.
    - Select this option to remove Guided Reporting or to perform an upgrade that is significant in changes to data tables that this method is required. Only business rules deployed on Guided Reporting during setup and installation are removed.

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

Dashboard

Guided Reporting provides one dashboard that displays main icons based on permission level.

This table shows the access permissions for each dashboard component:

Accessible Components	Administrators	Non-administrators
Home page	Yes	Yes
Report Management page	Yes	No
Settings > Global Options	Yes	No
Settings > User Preferences	Yes	Yes
Settings > Uninstall	Yes	No
Help page	Yes	Yes

Report Management

The Report Management page streamlines administrative activities needed to set up Guided Reporting. Administrators can:

- Assign Cube View or Dashboard reports within Report Groups.
- Apply security.
- Create Report Groups.
- Discover parameters used in a Cube View report to view them through the Selector List view table.

To access the Report Management page, click **Report Management** page.

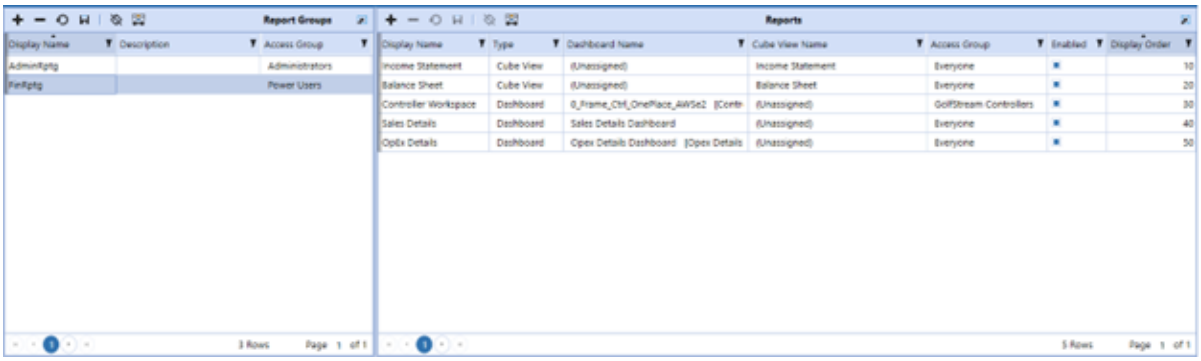
Security

When you create Report Groups and Reports in the Report Management page, set the Access group for each section from the Access Group drop-down list. This reflects the options found in the **System** > **Security** > **Groups** section of OneStream.

> **NOTE:** Access Group columns always default to **Everyone**.

> **Example:** The FinRptg report group has an Access Group set to Power Users, and there are individual reports set to Everyone and GolfStream Controllers. If some reports are set to Everyone, the Report Group takes priority for first pass security. If you are not set to the Power Users group, you

cannot access the report group of FinRptg on the Home page or individual reports set to Everyone.



Report Groups

The Report Groups table allows an administrator the flexibility to create groupings of reports based on categories or access groups.

Create a Report Group

1. Click **Insert Row**.
2. Enter a **Display Name**, which is the name for the report group that will appear on the Home page. The Display Name is a required field that must be unique and can contain up to 50 characters.
3. Enter a **Description**, which is a descriptive name for the report group. The Description field is optional and may contain up to 200 characters.
4. Select an **Access Group**. Assign the Access Group based on **System** > **Security** > **Group** settings for the Report Group.

5. Click **Save**.

> **IMPORTANT:** You must save the report group before you can add reports.

Reports

You can incorporate previously created Dashboard or Cube View reports into Guided Reporting in a simplified way. Each report group contains multiple reports with individualized security groups.

> **NOTE:** You can create a duplicate display name for a report that is in a different report group.

Add a Dashboard Report

You can add a Dashboard report to a report group. Each report has its own Access Group settings.

1. Select a Report Group from the Report Groups list.
2. In the Reports section, click **Insert Row** to add a report.
3. In Display Name, enter the name of the report. This is the displayed name on the Home page.
4. In Type, select **Dashboard**. In Dashboard Name, select a dashboard from the list of all dashboards available in OneStream.
5. Assign the Access Group, which is based on the **System** > **Security** > **Group** setting.
6. Set your settings:

Enabled: If selected, you will see the report on the Home page. It is selected by default.

- **Display Order**: Order in which you can select the reports from a list view within the Report Group.

> **NOTE:** If the default remains at 10, reports on the Home page will be in alphabetical order.

7. Click **Save**.

> **NOTE:** A Dashboard report will be part of the Report Group.

Add a Cube View Report

You can add a Cube View report to a report group. Each report has its own Access Group settings.

1. Select a Report Group from the Report Groups list.
2. In Reports, click **Insert Row** to add a report.
3. In Display Name, enter the name of the report.
4. In Type, select **Cube View**. In Cube View Name, select a Cube View from the list of all Cube Views available in OneStream.
5. Assign the Access Group, which is based on the **System** > **Security** > **Group** setting.
6. Set your settings:

Enabled: If selected, you will see the report on the Home page. It is selected by default.

- **Display Order**: Order in which you can select the reports from a list view within the Report Group.

  > **NOTE:** If the default remains at 10, reports on the Home page will be in alphabetical order.

7. Click **Save**.

   > **NOTE:** A Cube View report will be part of the Report Group.

8. Go to Discover Parameters from Cube View Reports.

Discover Parameters from Cube View Reports

When Cube View reports are added to a report group, view parameters and their respective setups in the Selector List and Parameter Details table of the Report Management page. For these to appear, see Discover Parameters.

Discover Parameters

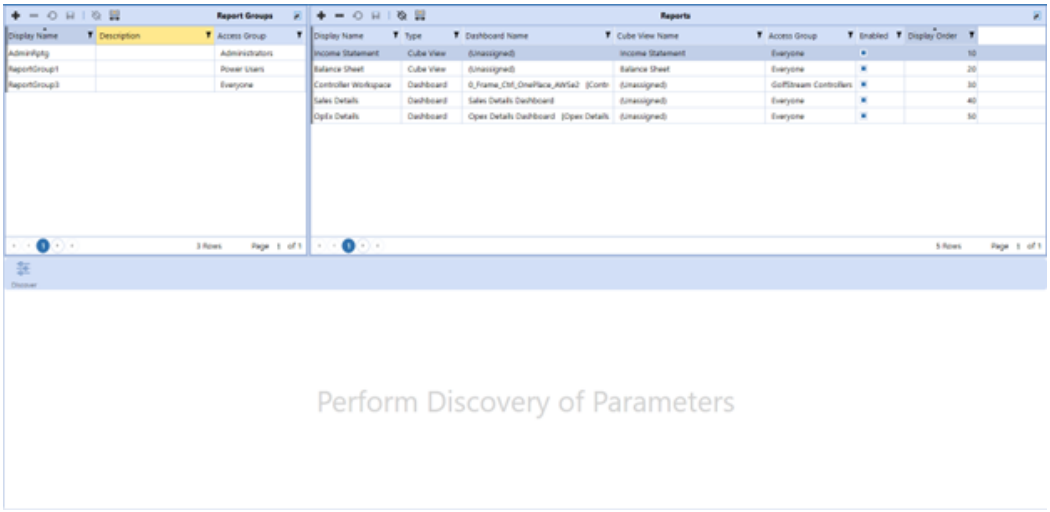
To view parameters in a Cube View report, ensure you have selected a Cube View report in the Reports section. After you select it, you will see a Discover icon located in the table below.

Click the **Discover** icon to initiate the following steps:

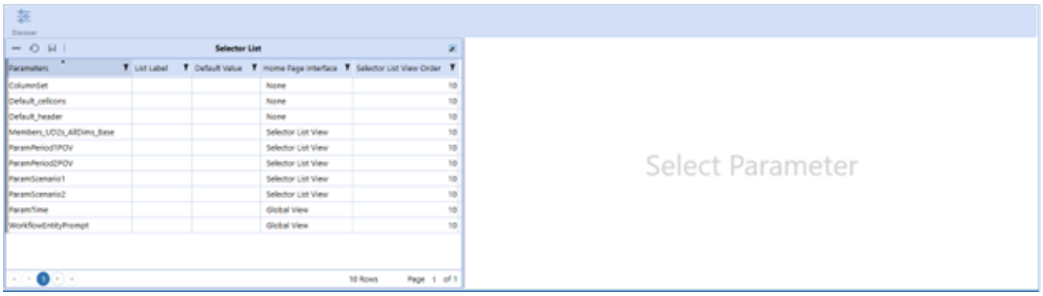
1. Gather parameters used in various areas of a Cube View report
2. Compile parameters into a Selector List table
3. Provide information on how parameters render on the Home page

> **IMPORTANT:** You must click the Discover icon for Cube View reports to interface with the Cube View on the Home page.

The image below shows the *Perform Discovery of Parameters* prompt that displays after you first create a Cube View.



1. In the Reports list, select a Cube View and click **Discover**. OneStream scans the parameters assigned to the selected Cube View and populates the Selector List table. The Selector List table opens.



> **NOTE:** If you add parameters to the Cube View and then click **Discover**, the new parameters display in this list. If you delete a parameter from a Cube View, you must perform the Discover process again to remove it from the Home page selections.

2. View or populate the Selector List properties:

- **Parameter**: Populated based on parameters assigned to the Cube View.
- **List Label**: When you populate the label, it updates on the Home page. If you do not populate this value, the Home page displays the parameter name.
- **Default Value**: If assigned, this is the first filter shown by default on the Home page. If you do not populate this value, the Home page displays *No Selection*.
- **Home Page Interface**: Indicates if the parameter is set in the Global view, Selector List, or None. The Discover process identifies parameters that are being used in the Cube View, but also scans the Global Parameter Definition table to identify what parameters are being used as a global parameter. If none are used, the default is Selector List view or None.
- **Selector List View Order**: As an administrator, you have the flexibility to choose the order in which parameters display on the Home page. Apply the sort order in the Selector List table on the Cube View reports in the **Selector List View Order** column. The sort order assigned is retained on the Home page. If the Selector List View Order column is unchanged, the default sort order for the dimensions is the order of the POV such as cube, entity, scenario, and more.

> **NOTE:** Apply the sort order of the parameter in its designated area of the Home page. If you apply the sort order of a Global View item on the Selector List View Order column, you receive a message that redirects you to the Global Parameter Definition table, and modifications on that global parameter are not saved.

3. If you highlight a Cube View report and click **Discover** again, the list of parameters updates to reflect additions, removals, or updates of parameters made to the Cube

View. The right pane resets to the *Select Parameter* prompt.

4. Go to View Parameter Details.

> **NOTE:** If you go back to Reports and replace a Cube View name on a Cube View report you have already saved, the Selector List resets to *Perform Discovery of Parameters*.

> **NOTE:** When you click **Discover**, the original Cube View name is removed from the Dynamic Dashboard group, and those changes are dynamically updated through the parameter.

Home Page Interface Assignments within the Selector List

The Discover process determines if a parameter name matches the parameter name in the Global Parameter Definition table. If it exists in the table, the default for the Home page on the Selector List is Global view. If it does not exist in the table, the default is Selector List view.

If you click **Discover** again, the default Discover process begins. If the parameter no longer exists in the Global Parameter Definition table, and is still being used in the Cube View, the Home page updates to the Selector List view for that parameter.

You can override the Global view and assign a parameter to the Selector List view in a specific Cube View report. If you change the Global view parameter to Selector List view, anything populated as the List Label and Default Value for that Global view parameter overrides what is in the Global Options table. To change a Selector List view to a Global view, navigate to the Global Parameter Table and add that parameter.

> **NOTE:** If you do not update the Global Parameter Table to include a new parameter, the change of a Home page interface from Global view to Selector

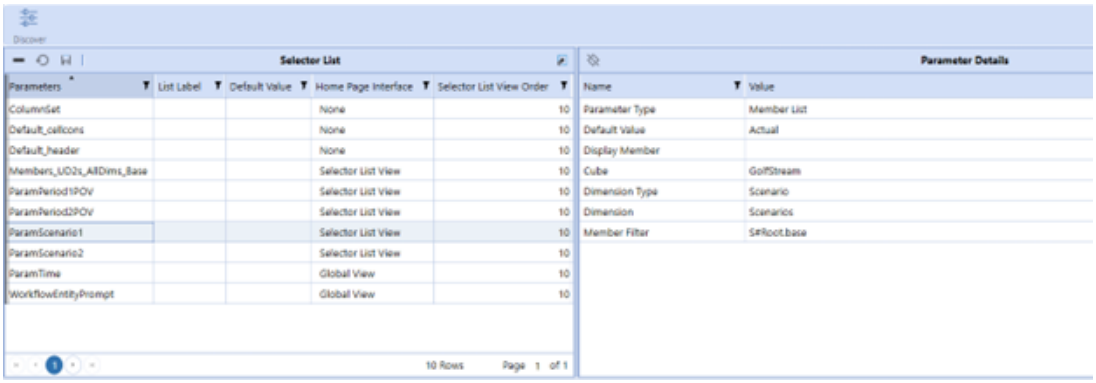
> List view on a parameter resets to Global view when you run the Discover process on a Cube View report. For the Home page interface on a parameter to change from a Selector List view to a Global view, you must add the parameter in the Global Parameter Definition Table. See Home Page.

View Parameter Details

In Selector List, select a parameter to view the details established upon creation. Any changes made to the parameter details on the Application tab are updated in the Parameter Details section of Guided Reporting without the need to click Discover again.

> **NOTE:** This information is read-only, but informs on what is included in the report for this parameter.

The default value of a parameter is the initial view for the parameter filter. When the default value of a parameter is modified, the next time the parameter is viewed, it will use the last value selected and not the default value that was initially displayed. You can select a different default value than what is listed in the Parameter Details by using the Default Value column within the Selector List table on the left.



Where Parameters are Discovered

After you click **Discover**, **Parameters** are found in these areas of a Cube View:

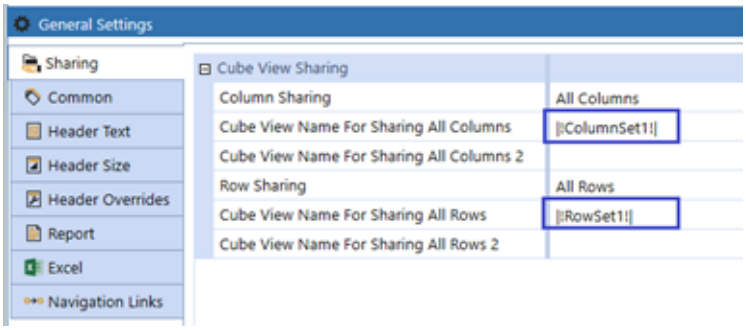
- **Cube View** > **POV**
- Cube View > General Settings > Sharing
    - If row or column is sharing a Cube View, the **Discover** process searches in the Cube View in the Member filter area of the shared Cube View for parameters.
    - If row or column is sharing a parameter, up to two parameters can be used for row set or column set and will appear in a different area of the Home page.
    - If a row or column set parameter has a Cube View that is using additional parameters, the parameters shown in the Member Filters section of that Cube View are also included in the Global or Selector List view of the Home page. See Discover Process for Cube View Templates Using Additional Parameters
- Cube View > Rows and Columns > Member Filters > **Row**
- Cube View > Rows and Columns > Member Filters > **Column**

Discover Process for Shared Column and Row Sets

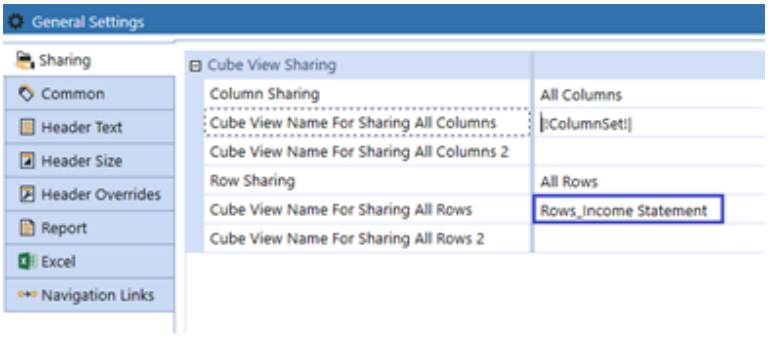
The Discover process includes the following shared column and row set parameters.

- **Discover column and row sets**: Any shared parameters on the column or row set are part of the Discover process and display in the Selector List table. The search includes an option to select up to two column parameters and two row parameters in

the **Cube View Sharing** section of the Cube View.

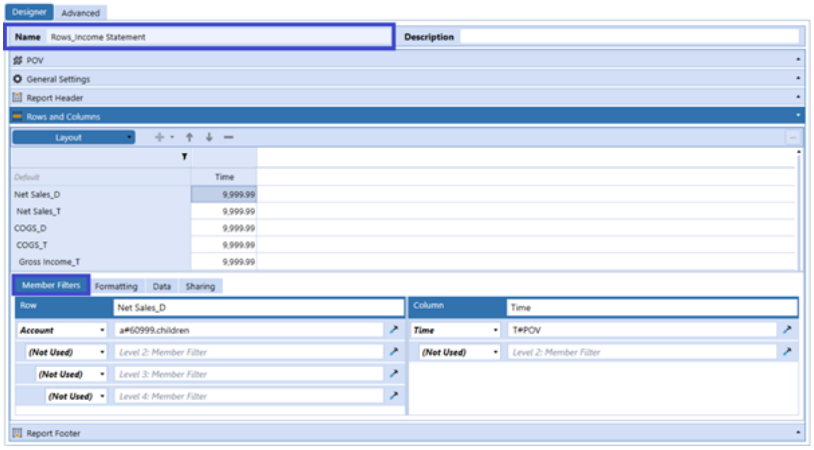


- **Discover column or row sharing for the Cube View**: Any Cube View under the **Column Sharing** section or **Row Sharing** section of a Cube View prompts the discover and rediscover process to go one level deeper and return any parameters listed in the Member Filters section of the columns or rows.



  - These also display in the Selector List table. The search includes an option to

select up to two column sets or row sets if in a Cube View.



- **Column and row sets on the Home page**: See User Interface for Shared Parameters Sets.

Parameters for Member Filters

Parameters assigned in the Member Filters section of a Cube View for rows and columns are included in the Discover process and display in the Selector List table with the default of Global view or Selector List view.

Delete a Row

From the Selector List table, if you click **Delete Row** and then **Save**, the parameter is removed and unavailable on the Home page. Removing the parameter from the Selector List does not remove it from the Cube View itself. If you rediscover, the parameter will be redisplayed in the Selector List table.

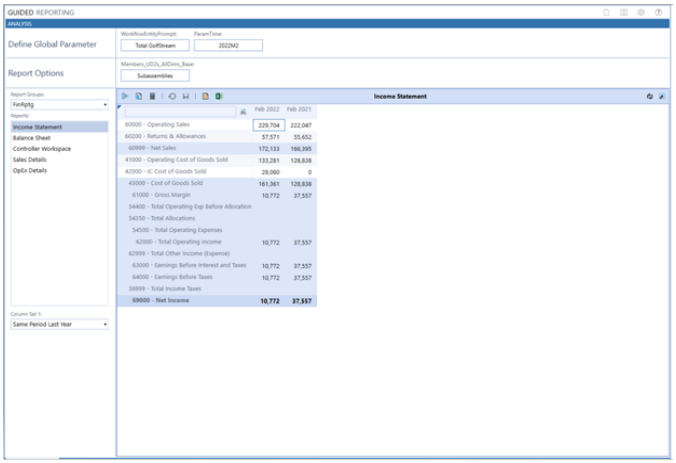
Home Page

The Home page interface offers dynamic views of the established report groups and reports as set by the administrator. This includes the viewing access of each report group. The accessibility options are a reflection of how your Cube View or dashboard are established in your application and any additional setup for labels and default values in the solution itself.

Guided Reporting provides parameters in a Global view or a Selector List view for you to work with and reference when reviewing chosen filters. On the Guided Reporting Home page, you can do the following:

- Define parameters available for selected Cube View reports such as global parameters, selector list view parameters, shared column or row set parameters
- Review Dashboard reports
- Select report groups
- Select reports

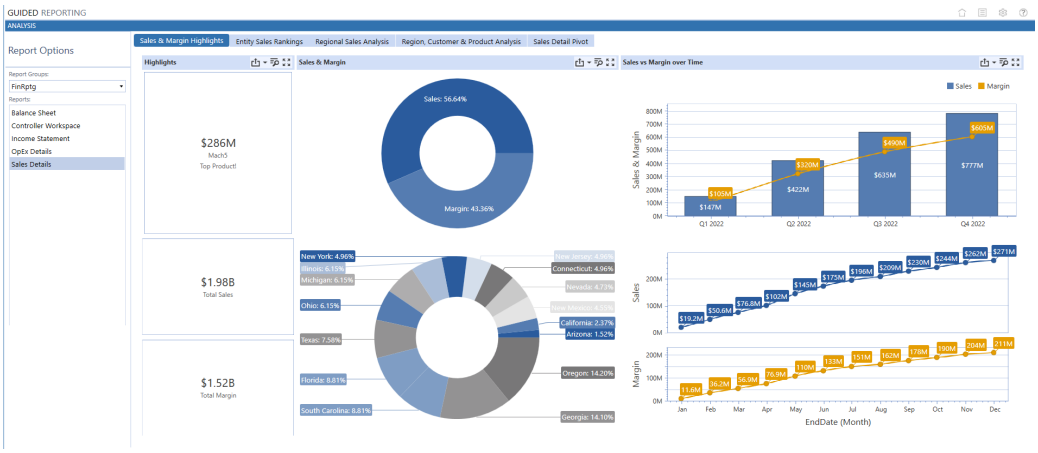
This image represents a Cube View that uses global and selector list parameters and a shared column set parameter.



The Define Global Parameter header and the Global Parameter bar only display on the Home page if the Global Parameter Definition table is used. If the Global Parameter Definition table is being used, the Home page will reflect as such if the Cube View report is using those parameters in the Global view.

> **NOTE:** The Global Parameter Definition table is used for Cube View reports only. There is no impact on this table for Dashboard report types.

When you toggle between report groups and reports, the right side of the Home page updates with a new Cube View or dashboard based on new filtered selections. Below is an example of how a Dashboard report would render.



> **NOTE:** The global parameter bar and selector list bar are not present. If parameters are defined and used in a Dashboard report, they remain in that dashboard as they are not part of the Discover process established for Cube Views in Guided Reporting.

Set Report Options and Filters

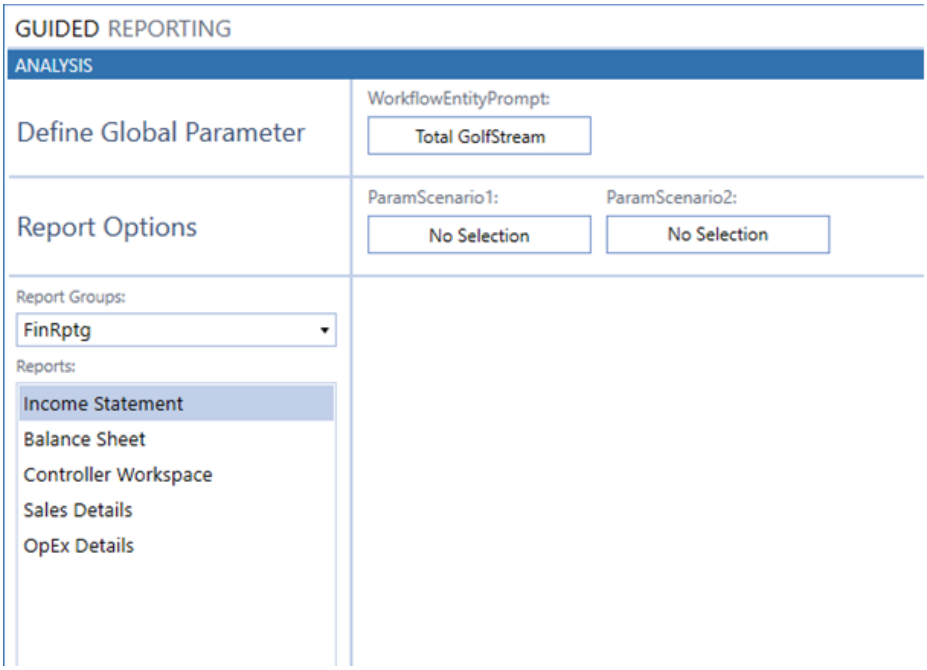
1. On the Home page, in Report Groups, select a report group.
2. In Reports, click a report.The report generates and populates the right side of the screen.
3. For reports specific to Cube Views, see Select Parameters.

Select Parameters

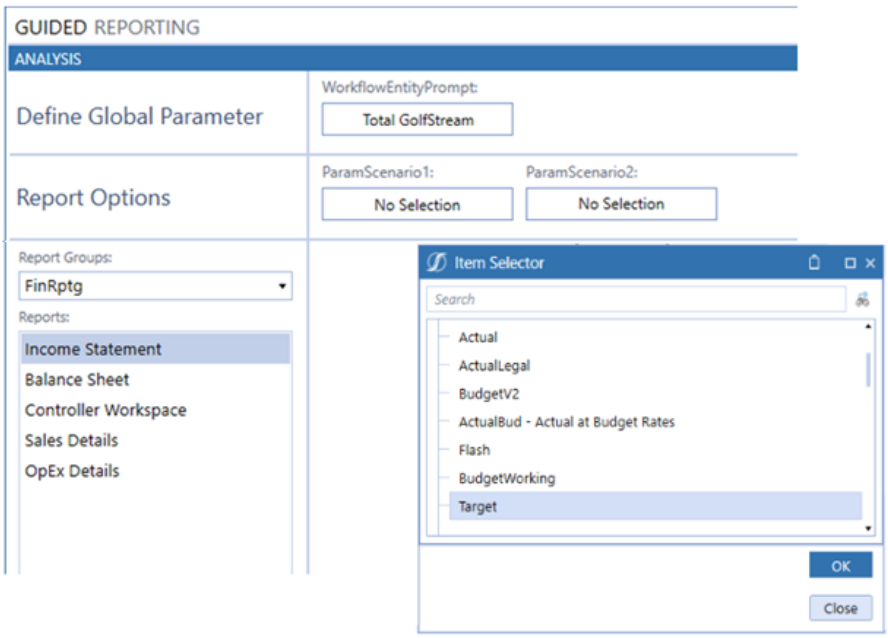
When viewing Cube View reports, parameters display based on what is used for that report, which may include multiple parameters for a single dimension.

A maximum of 15 parameters may be shown on the Home page. If more than 15 are used in a Cube View, you have the option on the Selector List to choose how the parameter is used on the Home page. For example, *None* will not show that parameter.

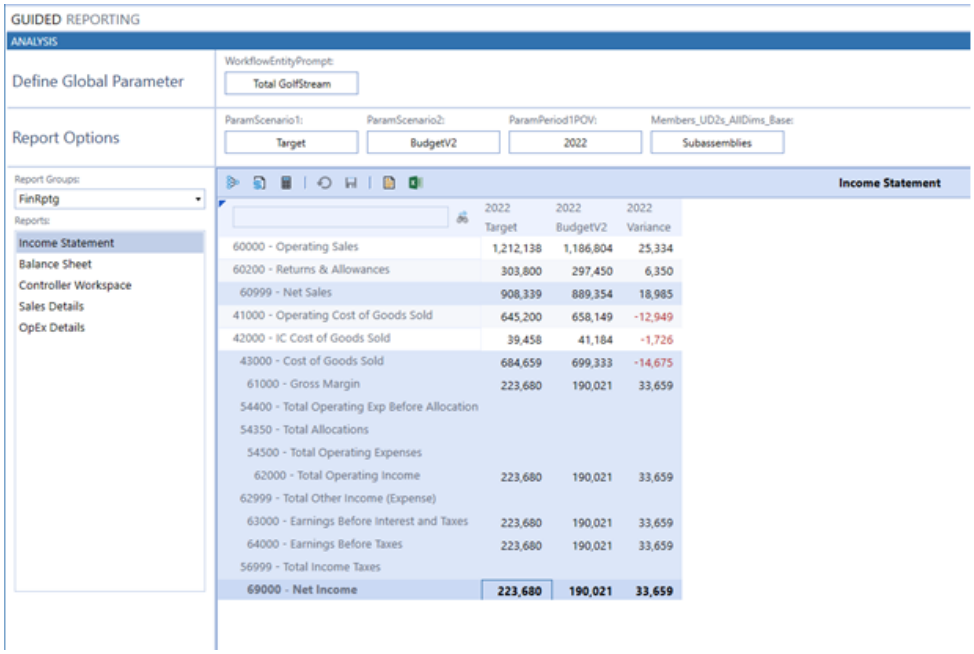
1. In the example below, there is a global parameter defined and two Selector List view parameters in the Selector List bar that display *No Selection*. Click the **No Selection** text box at the top of the screen.



2. In the Item Selector dialog box, select a parameter, and click **OK**.



The report populates with your parameter selections.

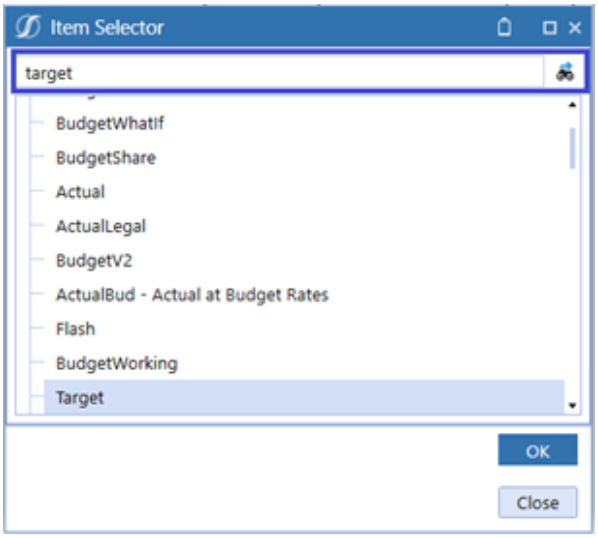


Change Parameter Selections

When viewing a Cube View report for the first time, parameters that have a default value will populate the filter. If a default value is not assigned to the parameter, *No Selection* will display. Once the parameter filter is selected, it will remain for future sessions where that parameter is used. You may choose to update a parameter at any time. For more information on rendering reports based on auto update features, see User Preferences.

1. Click a parameter at the top of the screen.
2. In Item Selector, select a parameter and then click **OK**.

The parameter and report update to the selection you made. If the parameter provides a large list of values to choose from, type the desired value in the Search bar and click the icon to the right. Using the search bar will take you directly to the searched value.



User Interface for Shared Parameters Sets

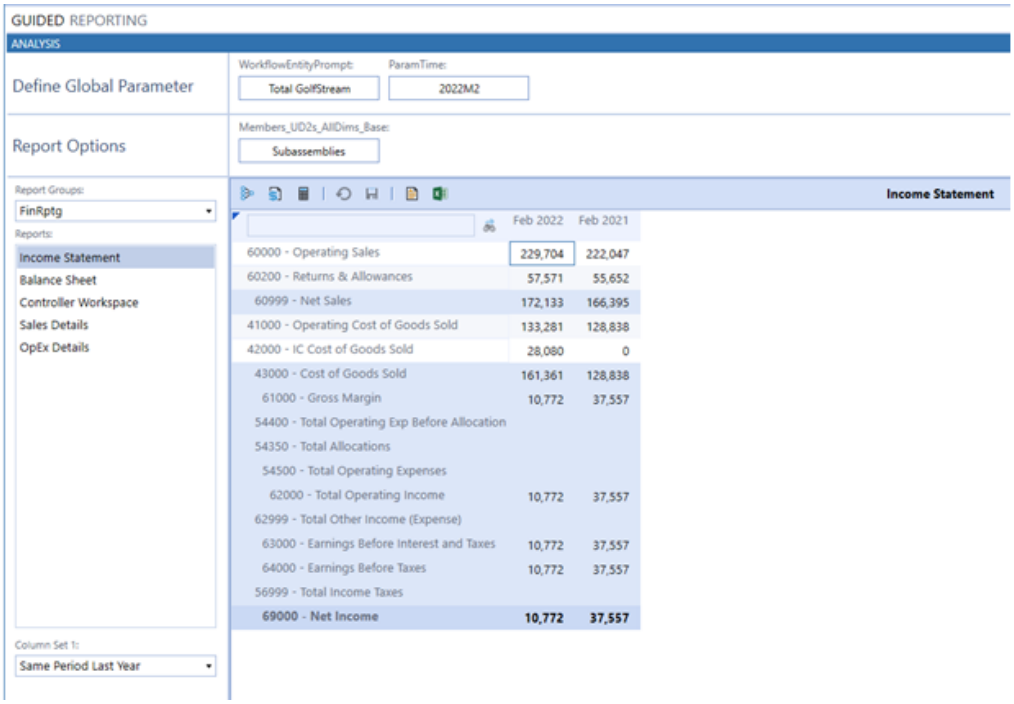
On the Home page, when selecting a report that has shared column or row sets, a drop-down list displays for each column and row set below the report listing.

> **NOTE:** There is a maximum of two column set and two row set lists.

These fields are dynamic based on the number of column sets or row sets used in your main Cube View. If shared column or row sets are not being used for that Cube View report, you will not see anything below the reports section on the Home page.

1. In Report Groups, select a report group.
2. In Reports, select a Cube View report that uses one or more shared parameter sets.
3. In the image below, there is a Cube View report that is using one column set parameter. Select a column set Cube View for your data to render to. In this example, the selection Same Period Last Year rendered Feb 2022 and Feb 2021

results.



4. Continue to make your selections based on the number of column sets and row sets the main Cube View report uses.

The report populates with the parameters you selected.

Use Reports with Parameters from Cube View Templates

If the main Cube View uses a parameter for column or row sharing, the Discover process for the main Cube View scans the member filter sections of the template Cube Views and includes those additional parameters to select from on the Home page. These parameters display when the template Cube View that it resides in is selected from the column or row set drop-down list.

They are dynamic in that parameters for each Cube View report only show the parameters assigned to it. If the template parameter is the same as a parameter used in the main Cube View, it updates using the single parameter shown.

If the template parameter for a single dimension is different from the main cube, the template parameter renders in the main Cube View report.

1. In Report Groups, select a report group.
2. In Reports, select the main Cube View report.
3. In Column Set or Row Set, select a Cube View report with a template where an additional parameter is used within it. This template parameter dynamically appears in the Global view or the Selector List view.

Help and Miscellaneous Information

This page contains solution documentation.

Display Settings

OneStream Solutions frequently require the display of multiple data elements for proper data entry and analysis. Therefore, the recommended screen resolution is a minimum of 1920 x 1080 for optimal rendering of forms and reports.

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

Package Contents 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: GDR_PV6.0.0_SV103_PackageContents.zip

Identifier	Description
GDR	Solution ID
PV6.0.0	Minimum Platform version required to run solution

Identifier	Description
SV103	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.

Appendix: Additional Parameter Details

Parameter Types Available from the Discover Process

Member List	Selector List or Global View	Flat List of Members to Choose
Member Dialog	Both	Similar to Member Dialog but with search capabilities
Literal	None	Value is hard-coded and cannot be used on the Home page.
Input	Both	Value can be updated on the Home page.
Delimited List	Both	Valid values to choose from are populated in the parameter type.
Bound	Both Shown in the Reports section of the Home page	Members available to choose from are in the Command type.

Discover Process for Cube View Templates Using Additional Parameters

When you add a Cube View report to the report group that is using a shared parameter for the column or row set, and then click **Discover**, the process also scans all of the template parameters in the shared parameter for any dimension to see if any template parameters exist and are included in the Selector List table. Like any other parameter in the Selector List table, they default to the sort order of 10 and are designated to the proper Home page interface (the Selector List view, Global view, or None).