onestream

Metadata Builder Guide

PV520 SV101

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Table of Contents

Overview 1

Dependencies 1

Register Metadata Builder Add-in 2

Using Standard Templates 3

Dimensions Template_v52.xlsx 3

Workflow Template_v52.xlsx 3

Help and Miscellaneous Information 5

Display Settings 5

Package Contents and Naming Conventions 5

OneStream Solution Modification Considerations 6

Overview

Metadata Builder provides a set of functions that turn Excel cell values into OneStream XML strings by using a combination of an Excel Add-In tool and an Excel template file.

The standard templates provide an example of how to use Excel to create tabular layouts referenced in a formula which then produces an XML equivalent string. Copy and paste the combination of XML strings into a text file with the extension .xml and then load through the standard OneStream Load/Extract feature.

Dependencies

Component	Description
OneStream 5.2.0 or later	Minimum OneStream Platform version required to use this version of Metadata Builder.
Microsoft Office 2013 or later	Minimum Microsoft Office version required to use supported Excel Add-In feature.

Register Metadata Builder Add-in

Install the supplied Excel Add-in to enable the template. Copy OneStreamMetadataBuilder-v52.xlam to a folder named C:\OneStream. Create the folder if needed. It is helpful to use the same folder for each update to avoid updating all the formula links in each template that references the formulas in the Add-in.

Next, register the Add-in with Microsoft Excel:

1. Open Microsoft Office Excel 2013 or later.
2. Select **File** > **Options**.
3. Select **Add-ins**.
4. From the Manage field at the bottom of the dialog box, select **Excel Add-ins** and then click **Go**.
5. If OneStream Metadata Builder is not listed, click **Browse**.
6. Navigate to C:\OneStream, select OneStreamMetadataBuilder_vXX.xlam (where XX is the version number), and click **OK**.
7. Confirm OneStream Metadata Builder is selected, then click **OK**.
8. Open one of the supplied metadata templates and update the formula references by selecting the Data Ribbon and clicking **Edit Links**.
9. Select **OnestreamMetadataBuilder-vXX.xlam**, click **Change Source**, and then browse to the copied **OnestreamMetadataBuilder-vXX.xlam** file (C:\OneStream).

Using Standard Templates

These standard templates can be used by consultants and customers to import an initial set of metadata values into OneStream.

Dimensions Template_v52.xlsx

This template allows the creation of dimension members and their hierarchies in Excel. Using this template, you can load the following dimensions:

- Scenarios
- Entities
- Accounts
- Flow Members
- User Defined 1-8
    - Attribute Members

Workflow Template_v52.xlsx

This template allows the creation and manipulation of Workflow Profiles. The recommended approach for using this template is to create a Cube Root Profile and Input Templates from within the OneStream application. Next, use the Excel template to build the Workflow hierarchy under the Cube Root Profile. The best approach for adding Input Profiles is to add the primary information for the profile, reference an existing input template which will build the required input children, and set the detailed properties from the input template.

> **NOTE:** If any template fields are empty after import, the member fields will default to [None] which could be an invalid value for some member properties. Reference the dimension imported for the appropriate values available for each dimension property.

Help and Miscellaneous Information

This page contains additional solution documentation, including database migration information.

Display Settings

OneStream Platform and 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: MDB_PV5.2.0_SV101_PackageContents.zip

Identifier	Description
MDB	Solution ID
PV5.2.0	Minimum Platform version required to run solution

Identifier	Description
SV101	Solution version
PackageContents	File name

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.