Narrative Reporting Guide

PV9.1.0 SV100

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Narrative Reporting Overview

The Narrative Reporting dashboard streamlines the contextual analysis, review, and narrative capture process. Key benefits of Narrative Reporting include:

Live Narrative Reporting
Analyze and search live, validated OneStream data and reporting content while capturing narratives to streamline the contextual analysis, review, and narrative capture process.

Reduce Risk and Reporting Errors
Leverage the same interface, workflows, validations, and controls to ensure trusted and auditable results to eliminate the risk and cost of traditional copy, paste, and duplicate across multiple tools and solutions.

Centralize and Streamline Assembly of Narrative Books
Centralize the creation of narrative books in OneStream, organizing all report content, live analysis, and collaborative capture of narratives to effectively analyze and communicate corporate performance.

Accelerate the Narrative Reporting Process
Leverage all existing OneStream reporting artifacts, import reporting content to quickly structure narrative books, copy from prior periods, and embed in the close, planning, and other workflow processes with approvals, saving time, driving efficiency and accelerating the narrative reporting process.

Trusted and Familiar Interface

Leverage the same OneStream interface and trusted reporting content along with the familiarity of Microsoft Office to capture narratives and create rich, formatted and collaborative narrative books. Intuitively combine rich text documents, text, Word Documents, Excel sheets, and PDF documents, all-in-one solution, to easily capture narrative content and deliver formatted narrative books.

Setup & 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 OneStream Solution Modification Considerations.

Dependencies

Component	Description
OneStream 9.1.0 or later	Minimum OneStream Platform version required to install this version of Narrative Reporting.

IMPORTANT: Before installing Navigation Center version 9.x or later, first install Narrative Reporting version 9.x. This ensures existing data and books are migrated.

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to Narrative Reporting 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 Narrative Reporting solution.

Select the Narrative Reporting 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.

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 Solution Database Migration Advice.

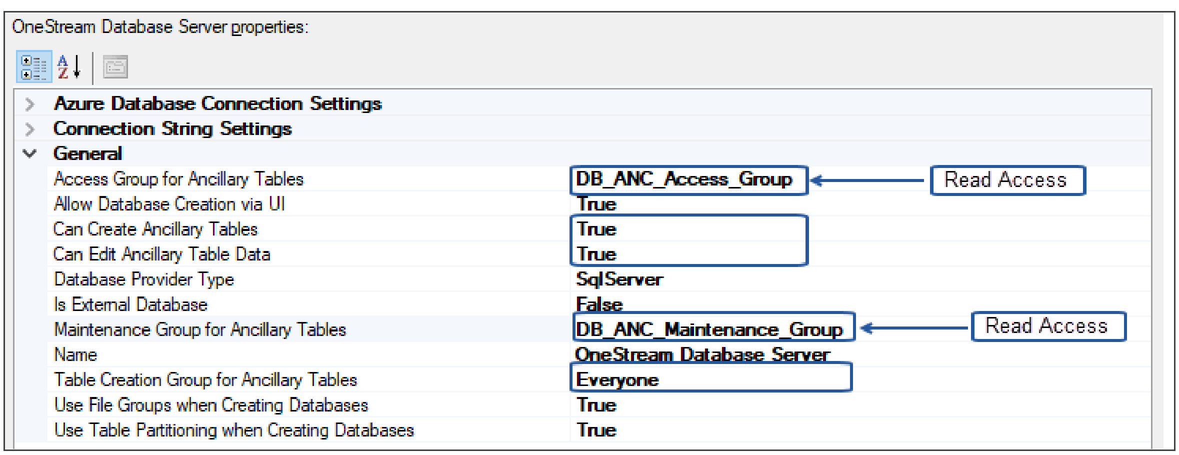
Configure the OneStream Application Server

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 Narrative Reporting

1. In **OneStream Solution Exchange**, go to **OneStream Solutions** and select the **Narrative Reporting** tile.

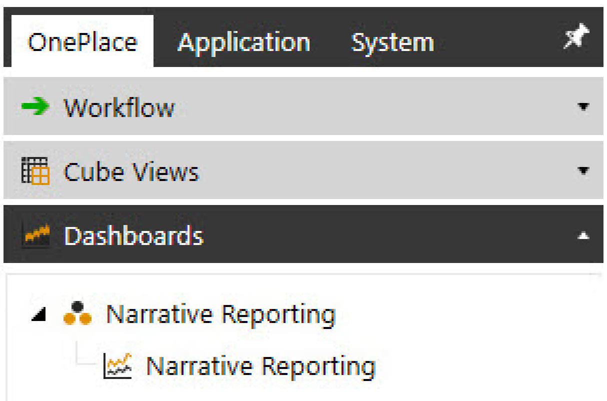
   

2. On the Narrative Reporting page, from the **Platform Version** drop-down menu, select the appropriate OneStreamPlatform Version.
3. In the **Solution Version** drop-down menu, select the most recent version.
4. Click the **Download** button.
5. Log in to OneStream.
6. On the **Application** tab, click **Tools**> **Load/Extract**.
7. On the **Load** tab, locate the solution package using the **Select File** buttons, and click the **Open** button.
8. When the solution file name displays, click the **Load** button.
9. Click the **Close** button to complete the installation.

Set Up Narrative Reporting

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

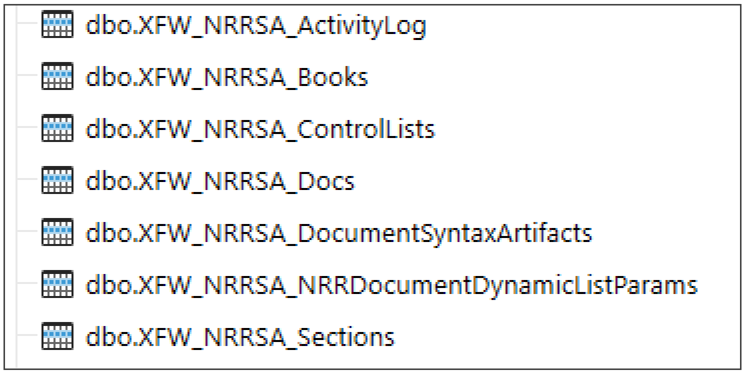
1. In OneStream, click **OnePlace** > **Dashboards** > **Narrative Reporting** > **Narrative Reporting**.



Create Tables

1. Click **Step 1: Setup Tables**

   This step may be necessary when upgrading even if tables are already present. Narrative Reporting does not drop existing tables but modifies table structures and adds new ones if necessary.



2. When setup is complete, click **Step 2: Launch Solution** to open Narrative Reporting.

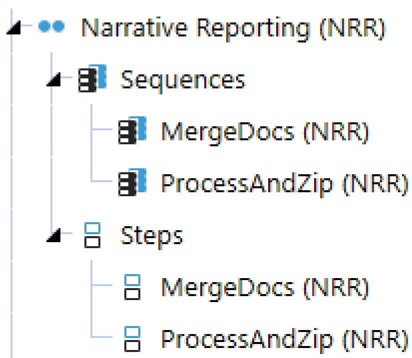
Package Contents

The Dashboard Maintenance Unit provides the user interface for Narrative Reporting and includes the required dashboard groups, components, data adapters, parameters, and files. The following business rules are included:

- **NRR_Helper Queries**: This is a dashboard dataset business rule. This rule provides various dashboard dataset helper functions to generate the reports for Narrative Reporting.
- **NRR_SolutionHelper**: This is a dashboard extender business rule that provides various helper functions for Narrative Reporting. These helper functions include management of the solution setup, configuration settings, and management reporting details.
- **NRR_ParamHelper**: This is an XFBR string business rule with conditional parameter helper and security access functions for Narrative Reporting.
- **NRR_ProcessAndZip**: This rule processes any document under a selected tree item and packages the files into a .zip file. Security access determines which files can be processed for a user.

- **NRR_MergeDocs**: This rule processes any document under a selected tree item and packages the files into a single document. Security access determines which files can be processed for a user.

The following Data Management Sequences and Steps are created and can be used with their related business rules. Running these processes through a Data Management Sequence allows them to run in the background while the user continues to work.



Settings

The Settings page contains three menus that guide administration including Book Management, Security Management, and Uninstall options.

Security Management

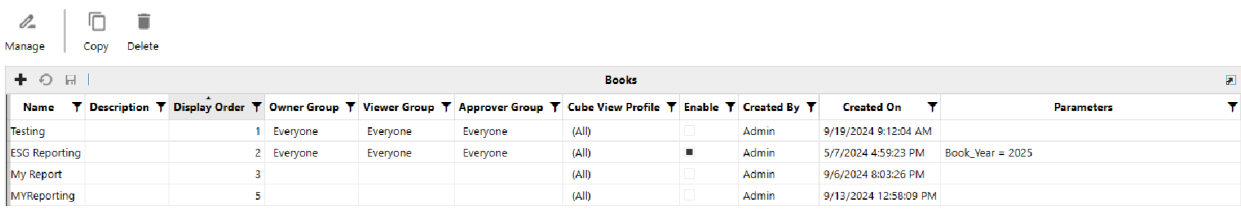
Administrators can use the Security Management settings to determine which groups can manage different parts of the Narrative Reporting solution. The following options can be set:

- **Security Role [Manage Narrative]**: Determines which security group can manage narrative books
- **Retained Version Threshold**: Determines the quantity of retained versions for documents within Narrative Reporting

Book Management

Administrators and book owners can create and manage report books using the Narrative Books page in Settings > Book Management. When managing books, follow these guidelines:

- Book and section names can be repeated.
- Each book can contain multiple sections.
- A section must only be assigned to one book.
- Two levels are supported in the navigation tree. For example, a section can be placed under another section.
- Each section can contain multiple documents.
- A document must only be assigned to one section.
- Document names must be unique in a single book, but they can be repeated across books.


Manage
Copy
Delete
Books

Name	Description	Display Order	Owner Group	Viewer Group	Approver Group	Cube View Profile	Enable	Created By	Created On	Parameters
Testing		1	Everyone	Everyone	Everyone	(All)		Admin	9/19/2024 9:12:04 AM	
ESG Reporting		2	Everyone	Everyone	Everyone	(All)	■	Admin	5/7/2024 4:59:23 PM	Book_Year = 2025
My Report		3				(All)		Admin	9/6/2024 8:03:26 PM	
MYReporting		5				(All)		Admin	9/13/2024 12:58:09 PM	

The Books grid displays the following information:

- **Name** (required): The name of the book.
- **Description**: The description of the book.

> **NOTE:** Book names and descriptions can be duplicated. The maximum number of characters is 500.

- **Display Order** (required): The order the book is displayed in the grid and in the Narrative Reporting home screen book drop-down menu.
- **Owner Group**: The security group that owns the book and all documents within the book. The default is Everyone.

- **Viewer Group**: The security group that can view the book and all documents in the book. The default is Everyone.
- **Approver Group**: The security group that can approve the book and all documents in the book. The default is Everyone.
- **Cube View Profile**: Sets the Cube View Profile for the book. Cube View Profiles determine which Cube View Groups display for users when they are inserting Cube Views into their documents using the Add Content wizard from the Artifacts tab on the Details pane.
- **Enable**: Determines whether the book is displayed to users in the drop-down menu above the navigation tree in Narrative Reporting. The Enable checkbox is selected by default. To remove the book from the drop-down menu, clear the Enable checkbox.
- **Created By**: The user who created the book. User details are automatically added when a book is created.
- **Created On**: The date the book was created. This field automatically populates when a book is created.
- **Parameters**: A field that can be referenced in a document to ensure data accuracy. Only custom, literal parameters you want to use in your books need to be entered using this column. Substitution variables and OneStream Workspace parameters can be entered directly into your narrative document using Quick Parts without creating it and saving it to book management.

  > **Example:** Parameter Name = Parameter Value

  > **NOTE:** Multiple parameters can be entered in this field separated by commas. If a comma is included in the value of a parameter, enclose the value in brackets. For example, Reporting Date = [Month Day, Year].

Narrative Books Management

Manage, copy, or delete a book by selecting it from the grid and clicking the respective button.

- **Manage**: This opens the Sections and Documents page where you can edit the structure of the book. See Sections and Documents.
- **Copy**: This copies the selected book and associated documents.

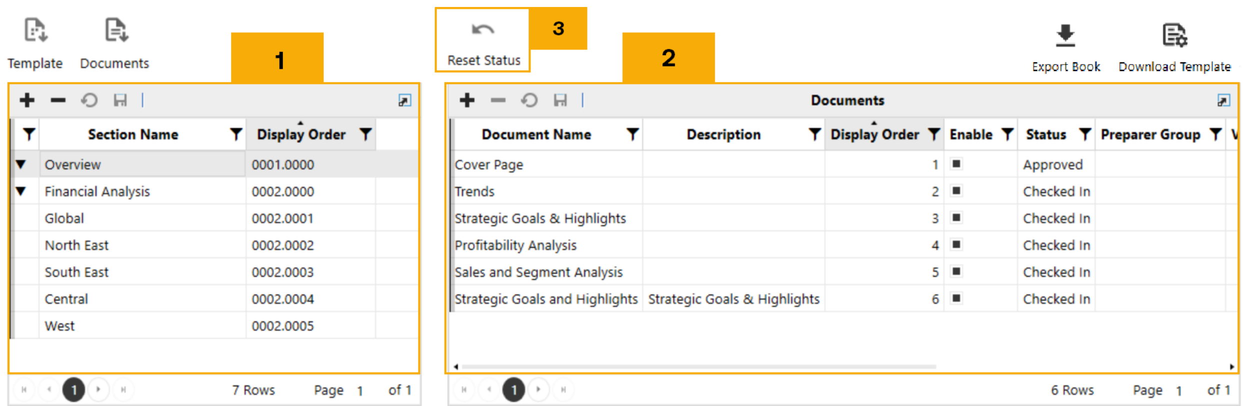
  > **NOTE:** All statuses for the copied documents are set to checked-in during the copy process.

- **Delete**: This permanently deletes the book and all associated documents, regardless of statuses.

Sections and Documents

Administrators and book owners can manage the structure of narrative books using the Sections and Documents page.

1. Create the structure of the book in the Sections grid . This structure is mirrored in the main display through the navigation tree.
2. Upload documents to the database and create your narrative book in the Documents grid.



1. The Sections grid displays the sections in a narrative book and includes the following information:
   - **Section Name**: The name of the section.
   - **Display Order**: The order the section is displayed in the book and in the navigation tree. When the number ends in a zero after the decimal place, such as 1.0 or 2.0, a new section indicator ▼ is automatically added to indicate a top-level section. The format must be ####.####, including the leading zeros.
2. The Documents grid displays the documents in each section and contains the following information:
   - **Document Name**: The name of the document. Names must be unique in a single book, but they can be repeated across books.
   - **Description**: The description of the document.
   - **Display Order**: The order in which the document is displayed within the section and in the navigation tree. The Display Order cannot be zero.

- **Enable**: This determines whether the document displays in the navigation tree after a book is selected. The Enable checkbox is selected by default. To remove the document from the navigation tree, clear the Enable checkbox.
- **Status**: Displays the current status of a document.
- **Preparer Group** (optional): The security group that can edit and submit the document for approval. This security group is in addition to the Book Owners group. The default is Everyone.
- **Viewer Group** (optional): The security group that can view the document. This security group is in addition to the Viewer group and can be left blank. The default is Everyone.
- **Approver Group** (optional): The security group who can approve the document. This security group is in addition to the Approver group. The default is Everyone.
- **Source File Name**: The name of the source file including the file extension.
- **Imported**: This indicates if the file has been imported into the table.
- **Page Break**: When enabled, this setting determines if a page break will be added after the document when the Merge function is used. When not enabled, the contents of merged documents will display without additional spacing or paragraph breaks.
- **Mode**: Determines how the document can be opened for editing. Document modes include the following options:
  - **OneStream Editor**: Users can edit and refresh documents dynamically using XF docs and document variables directly in Text Editor and Spreadsheet. See "Creating an Extensible Document in Text Editor" in the *Design and Reference Guide*.

  - **Office (Processed)**: Users can edit and refresh documents dynamically using XF docs and document variables directly in a Microsoft Office application. See "Creating an Extensible Document in Microsoft Word" in the *Design and Reference Guide*.
  - **Office**: Users can check out a document to a Microsoft application, edit it, and check it back in so all users can see the latest changes. See Work with Documents.
- **Parameters**: A field that can be referenced in a document to ensure data accuracy. Only custom, literal parameters you want to use in your documents need to be entered using this column. Substitution variables and OneStream Workspace parameters can be entered directly into your narrative document using Quick Parts without creating it and saving it to book management.

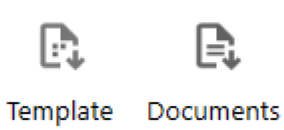
  > **Example:** Parameter Name = Parameter Value

  > **NOTE:** Multiple parameters can be entered in this field separated by commas. If a comma is included in the value of a parameter, enclose the value in brackets. For example, Reporting Date = [Month Day, Year].

3. **Reset Status**: On the Sections and Documents page, click this button to set the selected document back to checked-in status.

Create the Navigation Tree Structure

As an administrator or book owner, define the structure of a book by adding sections and documents individually or using the Import Template feature.



Sample Template

Click the **Template** button to upload a template containing the narrative book structure and create the sections and documents relationship. The template should be a comma-separated values (.csv) file. Click the **Download Template** button to access a sample template.

Before importing, consider the following information:

- The display order is automatically generated based on the row order in the .csv file.
- Import templates will replace the existing grid data.

Import the .csv file using the following fields:

	A	B	C	D	E	F	G	H	I	J	K
1	Type	Name	Description	Preparer Group	Viewer Group	Approver Group	Enable	Source File Name	Mode	Page Break	Parameters
2	Root	Overview									
3	Document	Cover Page					TRUE	01 - Cover Page.xfdoc.docx	OneStream Editor	FALSE	
4	Document	Strategic Goals & Highlights					TRUE	02 - Stragetic Goals and Highlights.xfdoc.c	OneStream Editor	FALSE	
5	Document	Trends					TRUE	03 - Trends.xfdoc.docx	OneStream Editor	FALSE	
6	Document	Profitability Analysis					TRUE	04 - Profitability Analysis.xfdoc.docx	OneStream Editor	FALSE	
7	Document	Sales and Segment Analysis					TRUE	05 - Sales and Segment Analysis.xfdoc.do	OneStream Editor	FALSE	
8	Root	Financial Analysis									
9	Section	Global									
10	Document	TrendsG	Trends				TRUE	06 - Trends.xfdoc.docx	OneStream Editor	FALSE	
11	Document	SGHG	Strategic Goals & Highlights				TRUE	07 - Stragetic Goals and Highlights.xfdoc.c	OneStream Editor	FALSE	
12	Section	North East									
13	Document	TrendsNE	Trends				TRUE	08 - Trends.xfdoc.docx	OneStream Editor	FALSE	
14	Document	SGHNE	Strategic Goals & Highlights				TRUE	09 - Stragetic Goals and Highlights.xfdoc.c	OneStream Editor	FALSE	
15	Section	South East									
16	Document	TrendsSE	Trends				TRUE	10 - Trends.xfdoc.docx	OneStream Editor	FALSE	
17	Document	SGHSE	Strategic Goals & Highlights				TRUE	11 - Stragetic Goals and Highlights.xfdoc.c	OneStream Editor	FALSE	
18	Section	Central									
19	Document	TrendsC	Trends				TRUE	12 - Trends.xfdoc.docx	OneStream Editor	FALSE	
20	Document	SGHC	Strategic Goals & Highlights				TRUE	13 - Stragetic Goals and Highlights.xfdoc.c	OneStream Editor	FALSE	
21	Section	West									
22	Document	TrendsW	Trends				TRUE	14 - Trends.xfdoc.docx	OneStream Editor	FALSE	

- **Type**: This describes the structure of the book. Enter Root, Section, or Document.
  - **Root**: This defines the top level of a section.

    > **IMPORTANT:** The template should always start with a Root type.

  - **Section**: This defines sections of a book.
  - **Document**: This defines the document.
- **Name** (required): The name of the section or document.

- **Description**: The description of the document. Description is optional for Section type.
- **Preparer Group**: The security group that can edit and submit the document for approval. The default is Everyone.
- **Viewer Group**: The security group that can view the document. The default is Everyone.
- **Approver Group**: The security group that can approve the document. The default is Everyone.
- **Enable**: True or False field indicating if a document will display in the navigation tree. The default value is True when the field is left blank.
- **Source File Name**: The unique name of the source file including the file extension.
- **Mode**: Determines how the document can be opened for editing. See Mode in Document Grid.
- **Page Break**: When enabled, this setting determines if a page break will be added after the document when the Merge function is used. When not enabled, the contents of merged documents will display without additional spacing or paragraph breaks.
- **Parameters** (optional): A field that can be referenced in a document to ensure data accuracy.

Documents

After you define a book structure, you can import individual documents or a .zip file using the Documents icon. Supported file types include Microsoft Word, Excel, and PowerPoint documents. Before importing, make sure the file has been saved and closed.

1. From **Sections and Documents**, select a section.
2. Click the **Documents** button.
3. Use **File Explorer** to select your file. Click the **Open** button.

Export Book Content

Click the **Export Book** button to extract all book and document details into a .csv file. This file enables you to quickly import your narrative reporting details across environments and applications.

Uninstall

Use the Uninstall feature to uninstall the Narrative Reporting interface or the entire solution. If done as part of an upgrade, any modifications performed on standard Narrative Reporting objects are removed.

1. On the **Settings** page, click the **Uninstall** tile.
2. On the **Uninstall** page, select **Uninstall UI** or **Uninstall Full**.
    - Use the **Uninstall UI** button to remove Narrative Reporting, including related dashboards and business rules, but retain the database and related tables.

      > **NOTE:** For some releases, perform this step before accepting a new solution version as some of the dashboards or other objects may have changed. Choose this option to update Narrative Reporting without removing the data tables. The Release Notes indicate if a reinstall over the existing installation is supported.

    - Use the **Uninstall Full** button to remove all related data tables, data, and Narrative Reporting dashboards and business rules. Choose this option to completely uninstall Narrative Reporting or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

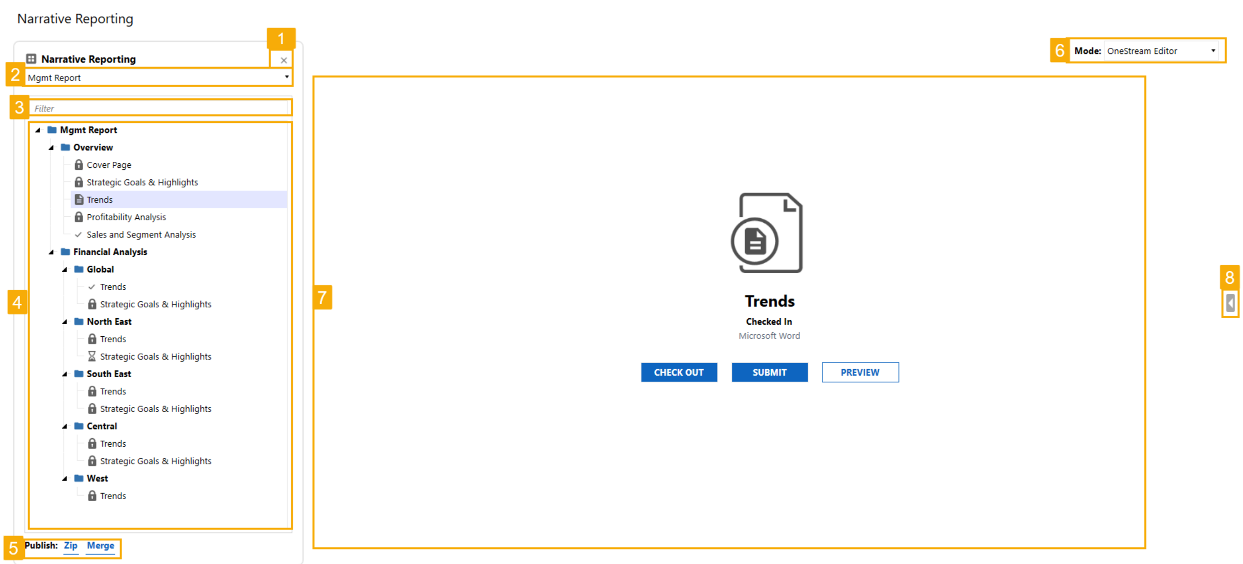
> **CAUTION:** Uninstall procedures are irreversible.

3. On the **Confirm** dialog box, click the **Uninstall** button to proceed.

Home

Narrative Reporting enables you to analyze and search live, validated OneStream data and reporting content while capturing narratives to streamline the contextual analysis, review, and narrative capture process.

Use the dashboard to view the structure of a book using the Tree Navigation. Only documents you have access to display in the Tree Navigation. Select documents within the book to preview, check out, submit, and approve during the reporting cycle.



1. **Close Pane Icon**: Used to close the Tree Navigation pane which increases the viewing area of a selected document. To reopen the Tree Navigation pane, click the  button.
2. **Narrative Books**: Drop-down list of enabled books. List selection varies by security group assigned to the user and book.

3. **Filter**: Search for documents or a section within the selected book.
4. **Tree Navigation**: Visual hierarchy displaying sections and documents of the selected book.
5. **Publish**: Download finalized versions of books and documents. See Publish Documents.
6. **Mode**: Drop-down used to select your preferred editing application. See Sections and Documents.
7. **Main Display**: Viewing area for documents selected using the Tree Navigation. Displayed information includes:
   - **Document Name**: The name of the document.
   - **Document Status**: The status of the document. See Document Statuses.
   - **Last modified date and time**: Date and time of the most recent changes.
   - **Document file type**: Source file type, such as Microsoft Word, Microsoft Excel, or others.
   - **Preview button**: Enables you to preview the document.
   - **Actions button**: Enables you to perform actions based on the current status. Buttons shown to users are based on permissions and may include:
     - Check-Out
     - Undo Check-Out
     - Check-In
     - Submit
     - Approve
     - Return

8. **Details Pane Toggle**: Expand the details pane to view document status, activity, and versioning. See Details Pane.

Document Statuses

Document status is represented by an icon in the Tree Navigation and in the Main Display area. Depending on the document status and the security group of the book and document, you will see different action buttons in the Main Display area.

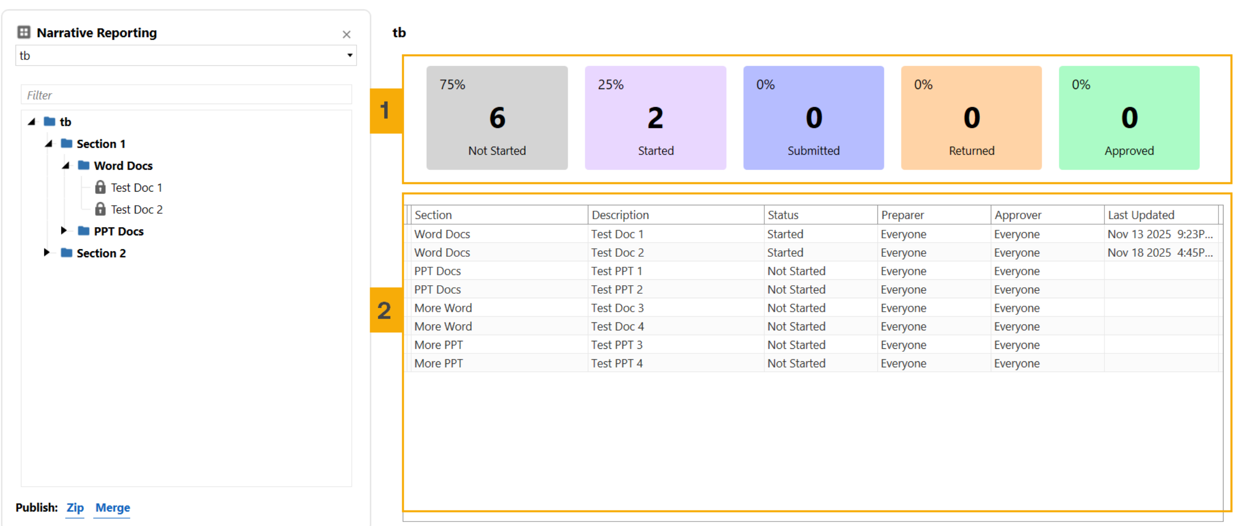
Status	Status Defined	Tree Navigation Icon	Main Display Icon
Checked-In	Document is available to check-out for edits.		
Checked-Out	Document is currently checked-out by another user.		
Submitted	Document has submitted for approval by a user.		

Status	Status Defined	Tree Navigation Icon	Main Display Icon
Returned	Approver has sent the document back to the user who submitted it for additional edits .		
Approved	Document has been reviewed and accepted by the Approver.		

Document Summaries

All Narrative Reporting users can view summaries of all the documents in the book or sections within the book, giving them the ability to see document progress. Select any section or the topmost folder to view the summaries for the sections or complete book.

> **NOTE:** All documents within a section or book are included in summary counts. This means, depending on your security access, what you see in the tree navigation may differ from the total counts shown on the cards.



The following summary information is displayed:

1. **Cards**: Shows document statuses within the section or book selected.

   > **NOTE:** Click any tile to filter the summary grid.

   - **Not started**: Documents that have imported to a book so the default status is checked-in, but the document has never been checked-out.
   - **Started**: Documents currently in a checked-out status or in a checked-in status but have been previously checked-out.
   - **Submitted**: - Documents that have been submitted for review and their status is Submitted.
   - **Returned**: Documents that have been reviewed and returned to the user who submitted the document for approval, setting the status to Returned.
   - **Approved**: Documents that have been reviewed and accepted so their status is Approved.

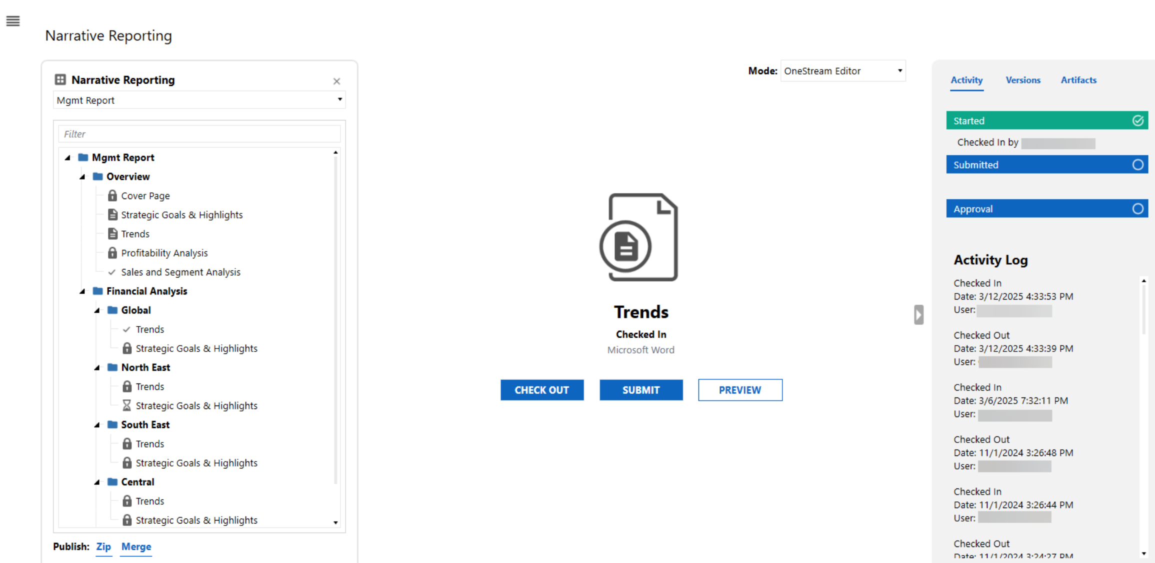
2. **Summary Grid**: An overview of the documents within the section or book selected.
   - **Section**: Name of the section.
   - **Description**: An overview of the document. If the description field for the document is left empty by an administrator or book owner, the document name will populate.
   - **Status**: Current document status.
   - **Preparer**: User who prepares the document. If the Document Preparer field is left empty by an administrator or book owner, the Book Owner name will appear.
   - **Approver**: User who can approve the document. If the Approver field is left empty by an administrator or book owner, the Book Approver name will appear.
   - **Last Updated**: Date and time the document was last modified.

Previewing Documents

With proper access, a document can be previewed in any status. To preview a document, follow these steps:

1. From **Narrative Reporting**, select a book from the drop-down menu.
2. Use the Tree Navigation or filter to locate the document, and select it.
3. In the Main Display area, click the **PREVIEW** button.
4. To increase your viewing area, click the **Close Pane** button on the Tree Navigation pane..

> **NOTE:** Use the  icon to expand the Tree Navigation.



Work with Documents

You must check out a document to make edits to it. Checking out a document prevents other users from making changes to it while you are accessing it. You can check out multiple documents at once. When done, you must check the document back in for others to view the changes.

Document Check Out

Make changes to a document in a narrative book by checking the document out.

1. From the **Home** page, select a book from the drop-down.
2. Use the Tree Navigation or filter to locate the document and select it.
3. **Optional**: Change the **Mode** drop-down to your preferred editing application.
4. From the Main Display, click the **Check Out** button to open the document. Alternatively, click the **Preview** button and then click the **Check In** button.

   > **NOTE:** After opening, the status of the document changes to checked-out and cannot be edited by another user.

5. Edit the document and click the **Save & Refresh** button to save and refresh your document.

Undo Document Check Out

If you check out a document by mistake, click the **Undo Check Out** button to immediately check the document back in without committing any changes. Administrators or Book Owners can undo a check out for another user.

Document Check In

After a document is checked out and changes have been made, check the document in to upload the changes. Only the user who has checked-out the document can perform this action.

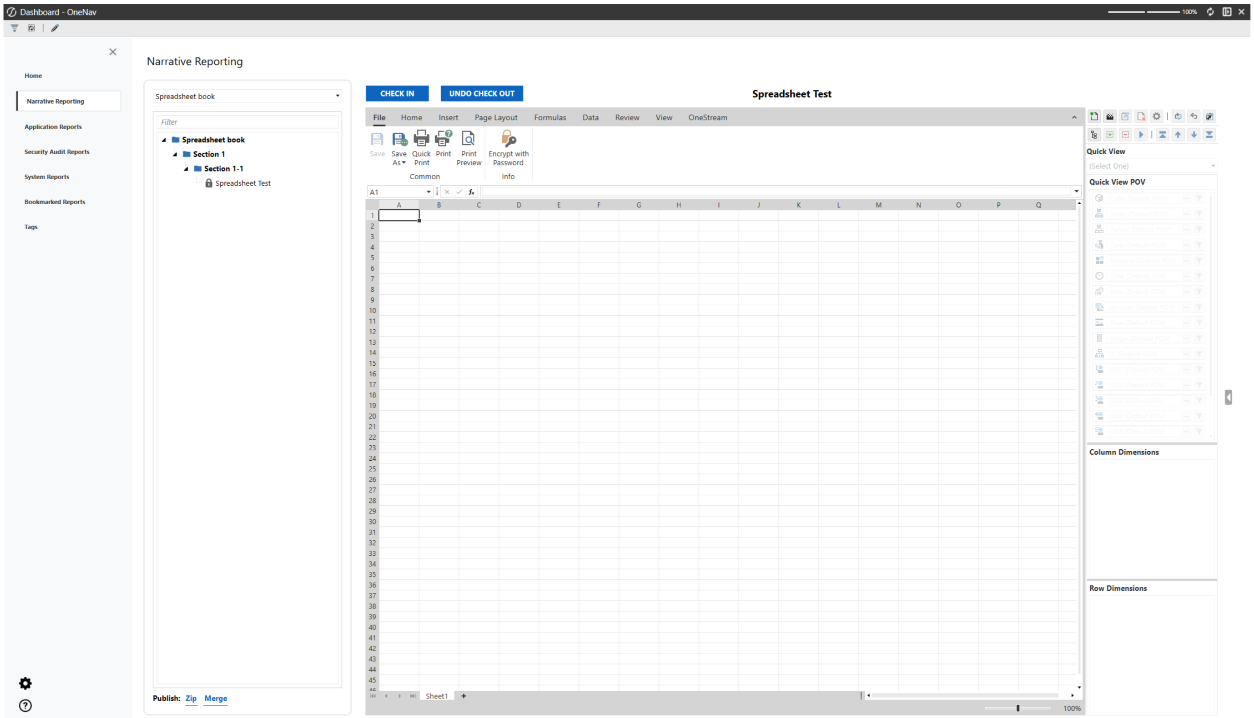
Microsoft Office

If you edited the document using a Microsoft application, such as Microsoft Word, Excel, or PowerPoint:

1. Save the document.
2. Navigate to the OneStream application and click the **Check In** button.
3. From File Explorer, select the document and click **Open**.

> **NOTE:** The file name checked-in must match the file name of the document checked-out.

OneStream Editor



If edits were made using OneStream Editor, including Text Editor or Spreadsheet:

1. Save all changes.
2. Click the **Check In** button.

> **NOTE:** Use the **Artifacts** tab in the **Details Pane** to edit all your artifacts directly in OneStream or to quickly add new artifacts. See Details Pane.

Submit a Document

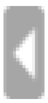
When a document is ready for final approval, from the Main Display, click the **Submit** button. The document is locked from further changes.

Approve or Return a Document

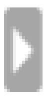
After a document is submitted and reviewed by the user indicated in the Approver Group, the user can choose from two options:

- Return the document to the user by clicking the **Return** button. Document status changes to Checked-In and becomes available for users to make additional changes.
- Approve the document by clicking the **Approve** button. Document status changes to Approved and additional edits cannot be made.

Details Pane

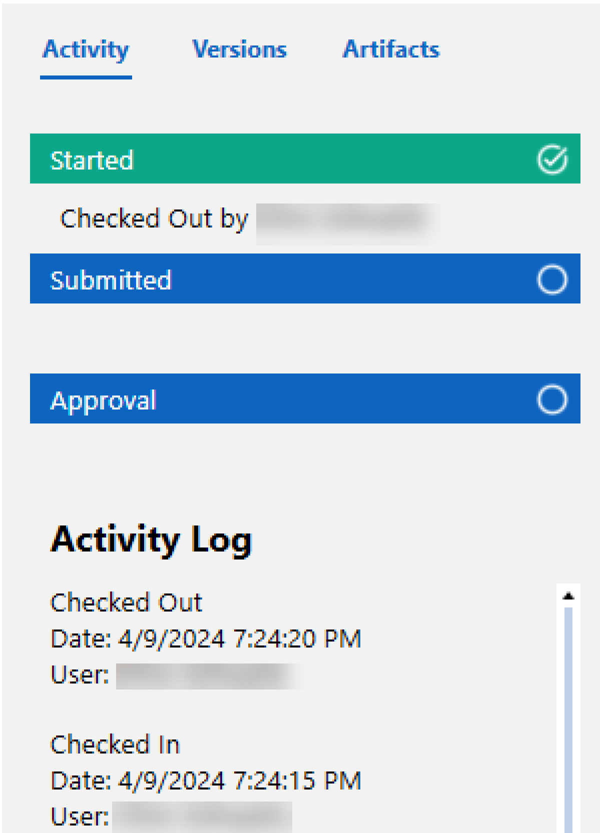


Click this button to open the Details pane.



Click this button to close the Details pane.

Activity Tab



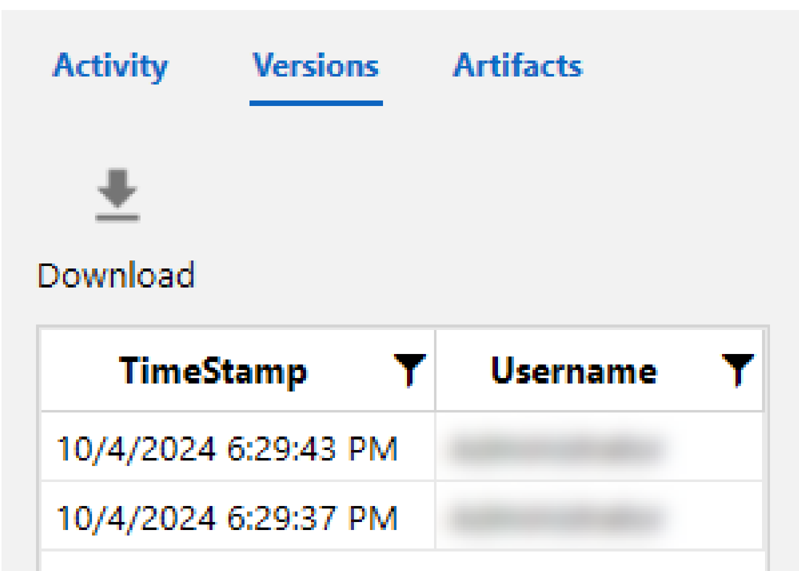
Select the **Activity** tab to view the status of the document displayed using a visual approval flow. Completed steps display in green while pending steps display in blue.

Additionally, view the Activity Log. The log displays all activities for the selected document. Logged actions include when a book is created or when a document is updated with one of the following activities:

- Created
- Saved
- Previewed
- Checked Out
- Returned using the Undo Check Out button
- Checked In
- Submitted
- Returned
- Approved

The log also displays the date and time of the modification using the system date and time of the user. The name of the user who performed the activiey is also logged.

Versions Tab



Narrative Reporting stores previous versions of a document. See Security Management.

Select the **Versions** tab to view the version history of the document.

Version details include the following information:

- **TimeStamp**: Date and time the document was checked in
- **Username**: Name of user who checked in the document

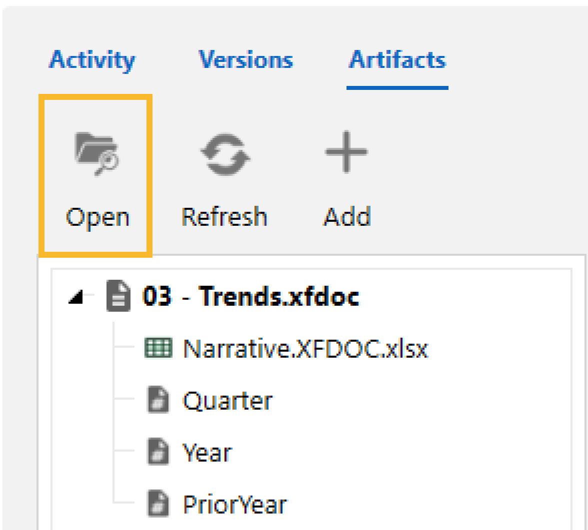
Click the **Download** button to download previous versions of the document.

Artifacts Tab

Use the Artifacts tab to quickly view and edit all artifacts in the selected document. Artifacts displayed include document variables, parameters, and extensible documents.

Open Artifacts

1. Open the **Details Pane**.
2. Go to the **Artifacts** tab, and select an artifact.
3. Click the **Open** button.



If the artifact is editable, make changes directly in OneStream. If the artifact is viewable, review the details. These artifacts are viewable:

- Cube Views
- Charts
- Excel Sheets
- Excel Named Ranges
- Parameters

> **NOTE:** Parameter details include the name of the parameter, the string value, and the resolved value. To create a new or add an existing parameter to your document or book, see Book Management for administrators or Insert Parameter for all other users.

4. If you made changes, save and refresh. When you refresh the document, your changes are incorporated.

Refresh Artifacts

Click the **Refresh** button to refresh the list of artifacts.

Add Content

You can add content to your narrative document in these ways:

- Artifacts wizard
- Manually using Quick Parts or parameter fields in Book Management

> **NOTE:** OneStream recommends using the Windows Application when adding new content into narrative documents.

Dynamic Wizard

Click this button to embed extensible content, such as charts and spreadsheets, and to create and insert document or book parameters using the Artifacts wizard.

To add a new artifact, open the **Details Pane**, go to the **Artifacts** tab, and click the **Add** button to be guided through the Artifacts wizard to add the following types of content:

- Insert Content Using Document Variables
- Insert Content Using Office Image
- Reference Book Content
- Insert Parameters
- Create Parameters

Manual Content Insertion

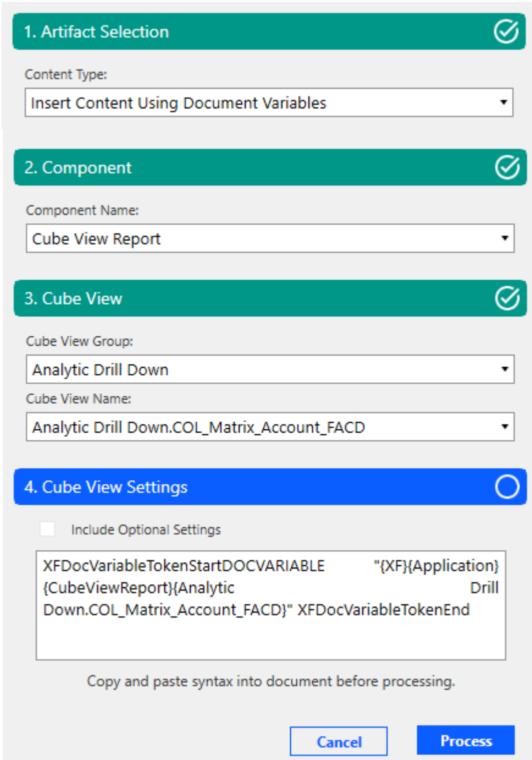
The following types of extensible content are supported outside of the Artifacts wizard:

- BI Viewer Chart Components
- XFCell References
- XFBRs

See Supported Extensible Content to learn more.

Insert Content Using Document Variables

Follow these steps in the wizard to insert content using a Microsoft Word document or OneStream Text Editor for Extensible Documents.



1. In the **Artifact Selection** section, from the **Content Type** drop-down menu, select **Insert Content Using Document Variables**.
2. In the **Component Name** section, choose an option:
   - Cube View Report
   - Excel Sheet
   - Excel Named Range
   - Microsoft Word Document
3. The header and available fields in step 3 dynamically update based on your previous selection.

- For **Cube View Report**, the header displays as Cube View, and you can populate these fields:
  - **Cube View Group**: The group containing the Cube View.

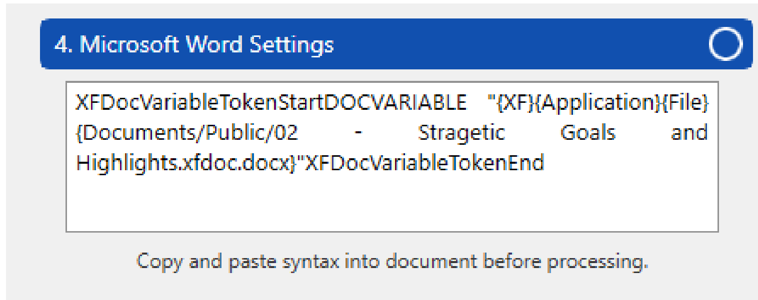
    > **NOTE:** The Cube View Groups displayed are defined by administrators when assigning Cube View Profiles. See Book Management.

  - **Cube View Name**: The name of the Cube View. All Cube Views associated with the Cube View Group are displayed.
- For **Excel Sheet**, **Excel Named Range**, or **Microsoft Word Document**, the header displays with the respective selection. Complete these steps:
  a. Click the **Browse** button.
  b. Use OneStream File Explorer to select a document from your files. When done, the Select a File text is replaced with the name of the file you chose.

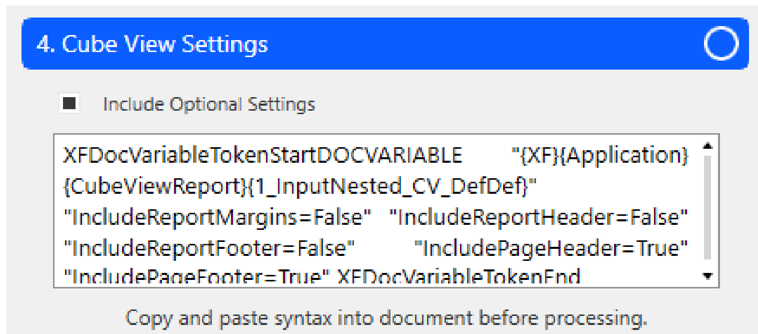
4. The header name dynamically updates based on your previous selections. For example, a Cube View selection in step 2 would display Cube View Settings in this step.

   Cube View Report and Excel Sheet selections enable you to select the Include Optional Settings checkbox. If you are not using Microsoft Word, select **Include Optional Settings** to include additional formatting options with your parameters. Formatting options depend on the component you are inserting. In the following example for Cube View, additional setting options include headers, footers, or margins for the Cube View.

Microsoft Word Example



Cube View Settings Example

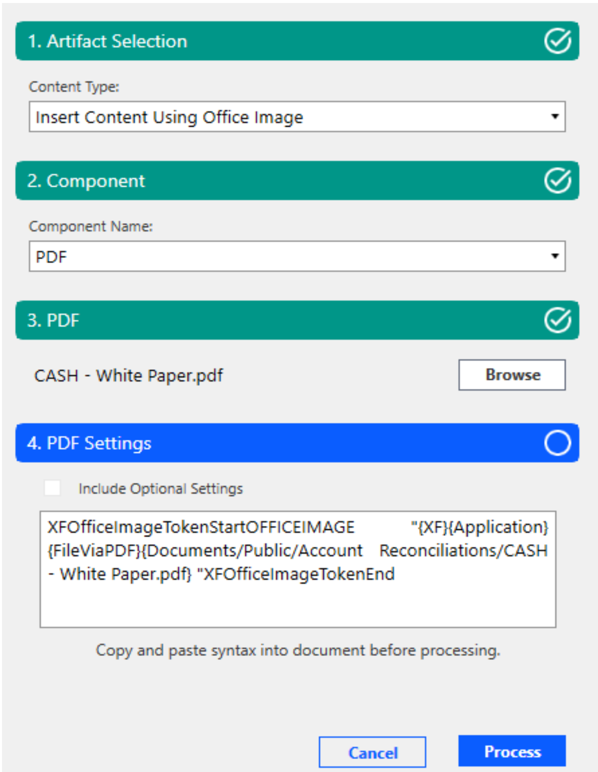


5. Copy the syntax from the **Settings** section and paste it into your document.
6. Click the **Process** button to save and render the embedded content. The Process button is only supported in the Windows Application.

Click the Cancel button at any time to close the wizard.

Insert Content Using Office Image

Follow these steps in the wizard to embed content using images.



1. In the **Artifact Selection** section, from the **Content Type** drop-down menu, select **Insert Content Using Office Image**.
2. In the **Component Name** section, choose an option:
   - Cube View Report
   - Excel Sheet
   - Excel Named Range
   - PDF
3. The header and available fields in step 3 dynamically update based on your previous selection.

- For **Cube View Report**, the header displays as Cube View, and you can populate these fields:
    - **Cube View Group**: The group containing the Cube View.

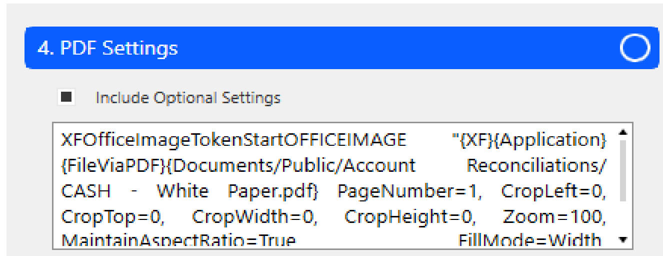
      > **NOTE:** The Cube View Groups displayed are defined by administrators when creating Cube View Profiles. See Book Management.

    - **Cube View Name**: The name of the Cube View. All Cube Views associated with the Cube View Group are displayed.
- For **Excel Sheet**, **Excel Named Range**, or **PDF**, the header displays with the respective selection. Complete these steps:
    a. Click the **Browse** button.
    b. Use OneStream File Explorer to select a document from your files. When done, the Select a File text is replaced with the name of the file you chose.

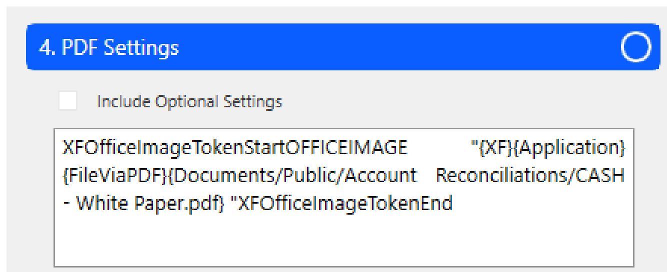
4. The header name dynamically updates based on your previous selections. For example, a Cube View selection in step 2 would display Cube View Settings in this step.

   Excel Sheet and PDF selections enable you to select the Include Optional Settings checkbox. Select **Include Optional Settings** to include additional formatting options with your parameters. Formatting options depend on the component you are inserting. In the following example for PDFs, additional setting options include cropping options and borders.

Include Optional Settings Enabled



Include Optional Settings Not Enabled



5. Copy the syntax from the **Settings** section and paste it into your document.

> **NOTE:** Alt text images are not supported in the Modern Browser Experience.

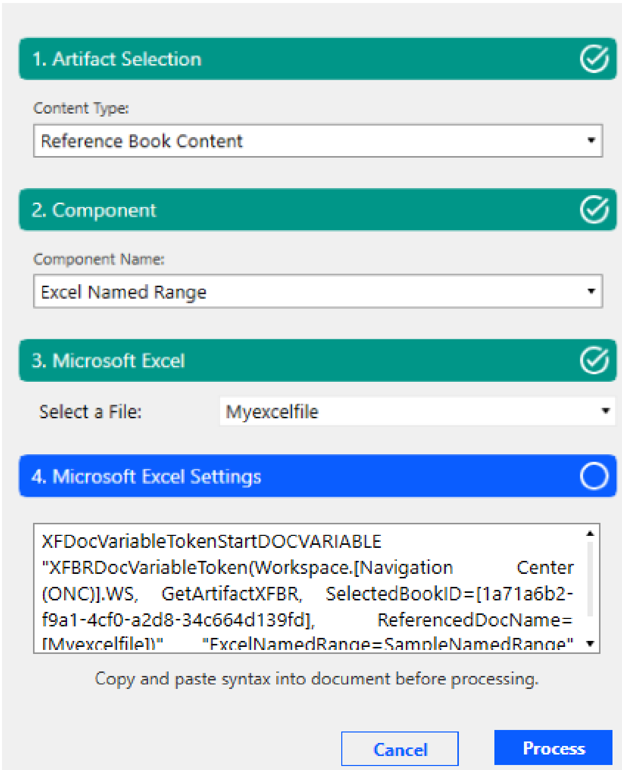
> **NOTE:** Syntax in PowerPoint documents must be embedded in images. See "Using Images in Extensible Documents" in the *Design and Reference Guide*.

6. Click the **Process** button to save and render the embedded content. The Process button is only supported in the Windows Application.

Click the Cancel button at any time to close the wizard.

Reference Book Content

Follow these steps in the wizard to embed a business rule that references a standalone Excel Sheet or Excel Named Ranged in the same narrative book. Referencing the content ensures the embedded content updates alongside the source document and remains secure.



1. In the **Artifact Selection** section, from the **Content Type** drop-down menu, select **Reference Book Content**.
2. In the **Component Name** section, choose an option:
   - Excel Sheet
   - Excel Named Range
3. In the **Microsoft Excel** section, from the **Select a File:** drop-down menu, choose your Microsoft Excel file or named range. The drop-down menu displays all the files you have access to in the current narrative book.
4. Copy the reference book syntax displayed below the **Microsoft Excel Settings** section and paste it into your document.
5. Click the **Process** button to save and render the embedded content.

Insert Parameter

Follow these steps in the wizard to embed an existing book or document parameter into your narrative document.

> **NOTE:** Existing parameters are pulled from the parameter section in Book Management. See Book Management.

1. In the **Artifact Selection** section, from the **Content Type** drop-down menu, select **Insert Parameter**.
2. In the **Parameter Type** drop-down menu, select the type of parameter to insert: Book Parameter or Document Parameter.
3. In the **Parameter Selection**, from the **Parameter Name** drop-down menu, select the parameter. The value of the selected parameter displays in the Parameter Value field.
4. In **Parameter Settings**, copy and paste the syntax into your document.
5. Click the **Process** button to save and view the rendered value.

Create Parameters

Follow these steps in the wizard to create a new parameter and save it to Book Management.

1. In the **Artifact Selection** section, from the **Content Type** drop-down menu, select **Create Parameter**.
2. In the **Parameter Type** drop-down menu, select the type of parameter to create: Book Parameter or Document Parameter.
3. In the **Parameter Selection** section, add this information:

- **Parameter Name**: Enter a name for the parameter.

> **NOTE:** Do not use special characters or dashes (-) in parameter names. For a list of restricted characters, see Dimension Member Names.

- **Parameter Value**: Enter the value of the parameter.

4. Click the **Save** button. Parameters are saved to the respective book or document in Book Management. To insert the parameter, see Insert Parameter.

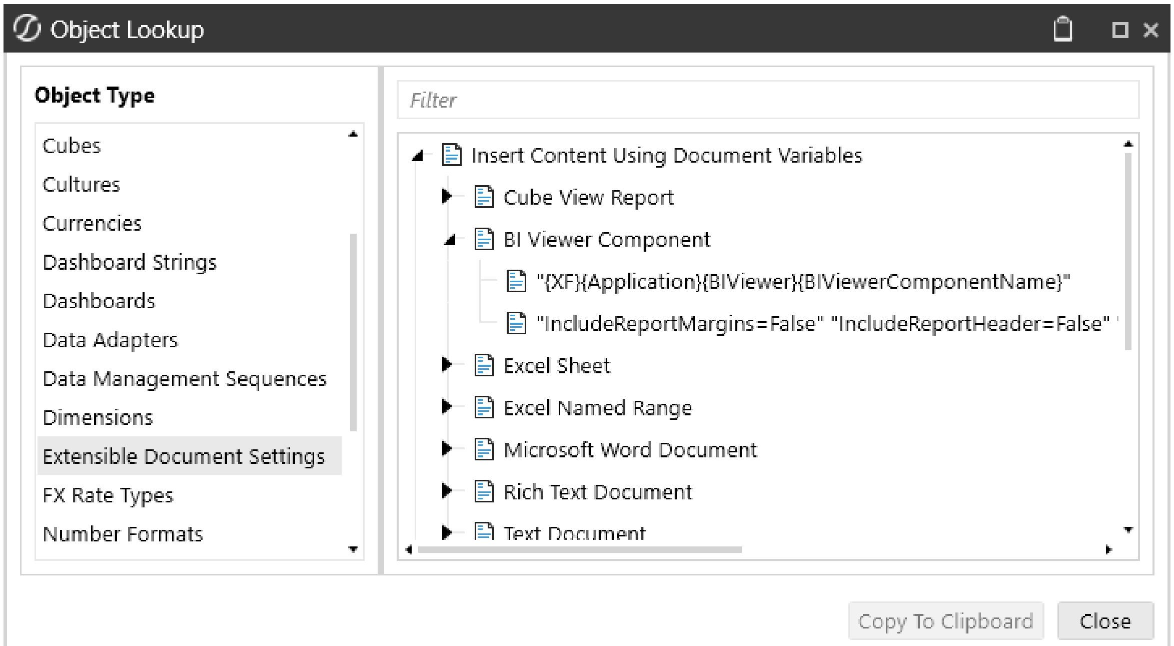
Supported Extensible Content

Add additional extensible content outside of the Artifacts wizard. These types are supported.

BI Viewer Chart Components

Use these steps to insert BI Viewer chart components into your document.

1. Go to **Application** > **Workspaces** > **Application Workspaces**.
2. Click the **Object Lookup** button.
3. In the **Object Lookup** dialog box, in **Object Types**, select **Extensible Document Settings**.
4. Use the search filter or scroll to locate **Insert Content Using Document Variables** > **BI Viewer Components**.



5. Select the syntax and click the **Copy to Clipboard** button.

6. Return to your narrative document.

7. On the ribbon, go to the **Insert tab** > **Quick Parts**.

8. In the **Doc Variable Name and Arguments** dialog box, paste the syntax and update any variables.

> **Example:** In this syntax, you will update the bolded text with the name of the BI Viewer component you want to display in your document: "{XF}{Application}{BIViewer}{**BIViewerComponentName**}".

9. Click the **OK** button.

10. Click the **Save and Refresh** button to view the component.

XFCell References

XFCells enable you to pull the data from a specific cell and dynamically display it in narrative documents. XFCell can be added to narrative documents as a parameter in the following ways:

- As a parameter in Book Management at the book or document level.
- As an application parameter, then inserted using Quick Parts.

> **IMPORTANT:** XFCell parameters cannot be added using the Artifact Wizard. Inserting it using the wizard auto-resolves the XFCell value.

Book or Document Parameter

Insert an XFcell reference as a book or document parameter using these steps:

1. Go to **Settings** > **Book Management**.
2. For a book level parameter, enter the XFcell string into the Parameter field for the book, enclosing the string in brackets. For a document-level parameter, click the manage button to access the documents in the book. Enter the XFcell string into the Parameter field for the document in the book, enclosing the string in brackets.
3. Save your changes.
4. Open your narrative document.
5. On the ribbon, go to the **Insert tab** > **Quick Parts**.
6. In the **Doc Variable Name and Arguments** dialog box, paste the parameter value.

   > **IMPORTANT:** After pasting, verify the parameter includes pipes and exclamation points. For example: |!BookParam!|.

7. Click the **OK** button.
8. Click the **Save and Refresh** button to view your changes.

Application Parameter

1. Add the XFCell as an application parameter. See Create a Parameter.
2. Copy the syntax and navigate to your narrative document.
3. On the ribbon, go to the **Insert tab** > **Quick Parts**.
4. In the **Doc Variable Name and Arguments** dialog box, paste the parameter value.

   > **IMPORTANT:** After pasting, verify the parameter includes pipes and exclamation points. For example: |!prm_Entity!|.

5. Click the **OK** button.
6. Click the **Save and Refresh** button to view your changes.

XFBR

Add existing XFBR rules to narrative documents using Quick Parts.

1. Go to **Application** > **Tools** > **Business Rules** to locate the XFBR string you want to insert.
2. Copy the string and navigate back to the narrative document.
3. On the ribbon, go to the **Insert tab** > **Quick Parts**.
4. In the **Doc Variable Name and Arguments** dialog box, paste the XFBR string.
5. Click the **OK** button.

   > **NOTE:** The string is automatically modified to ensure the business rule run

> correctly.

6. Click the **Save and Refresh** button to view your changes.

Publish Documents

From Narrative Reporting, publish documents for easy sharing by either creating a zip file or merging all documents into one file. Output of the publish tools is a processed version of the document.

Publish: Zip Merge

Books and Documents with Parameters

Follow this guidance when using Zip and Merge:

- When parameters exist on a book, but not a document, parameters are applied to all documents in the book.
- When parameters are in documents, but not in a book, parameters are applied to the specified document.
- When parameters conflict between books and documents, book parameters are applied to all documents and the conflicting document parameters supersede the book parameters.

Zip

Download individual documents as a .zip file to view the documents on your local machine by using the Zip functionality. You can zip the following file types:

- Microsoft Word
- Microsoft PowerPoint
- Microsoft Excel
- PDF

To create a .zip file, follow these steps:

1. Select the book, section, or documents to be zipped.
2. Under the Tree Navigation, click **Zip**.

Files are downloaded to your OneStream user folder.

Merge

Rather than downloading and sharing individual documents, you can download a merged version of a book or individual section using the merge feature. File types supported by the merge feature include Microsoft Word and PowerPoint.

> **NOTE:** When your merge contains both PowerPoint and Microsoft Word documents, a file for each type will be generated; one contains all PowerPoint documents and another contains all Microsoft Word documents.

To create a merged version, follow these steps:

1. Select the book or section to merge.
2. Under the Tree Navigation, click **Merge**.

Files are downloaded to your OneStream user folder.

Help and Miscellaneous Information

?	Access the help documentation.

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.

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: `NRR_PV9.1.0_SV100_PackageContents.zip`

Identifier	Description
NRR	Solution ID
PV9.1.0	Minimum Platform version required to run solution

Identifier	Description
SV100	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*.

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 has the potential to overwrite existing table data in the production application database if data already exists.

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.