onestream

Navigation Center Guide

PV8.5.0 SV103

Table of Contents

Overview

Navigation Center streamlines the reporting process by combining all application, audit, system, and narrative reports into one, unified interface. The solution enables you to quickly generate, bookmark, and tag reports and prioritize coming due reports so you never miss a deadline.

> **TIP:** Use Navigation Center wherever you are by accessing it through the web using our Modern Browser Experience. The web-based offering works alongside the existing OneStream Windows Application and provides you increased flexibility to access your financial data whenever and across a wide range of devices.

Security Audit Reports

Security Audit Reports provides you with an overview of user and group information for internal security audit purposes.

Application Reports

Standard Application Reports includes a set of predefined reports that can be imported into any OneStream application and used for basic application reporting, such as:

- Application Analysis
- Intercompany Matching
- Journal Detail
- Metadata Changes

- Transformation Rule Change
- Workflow Status

This solution is based on SQL-based data adapters.

Standard System Reports

Used for basic system reporting, Standard System Reports is a set of predefined System Dashboards that can be imported into any OneStream application.

Narrative Reporting

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 8.5.0 or later	Minimum OneStream Platform version required to install this version of Navigation Center.

Select the Navigation Center 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.

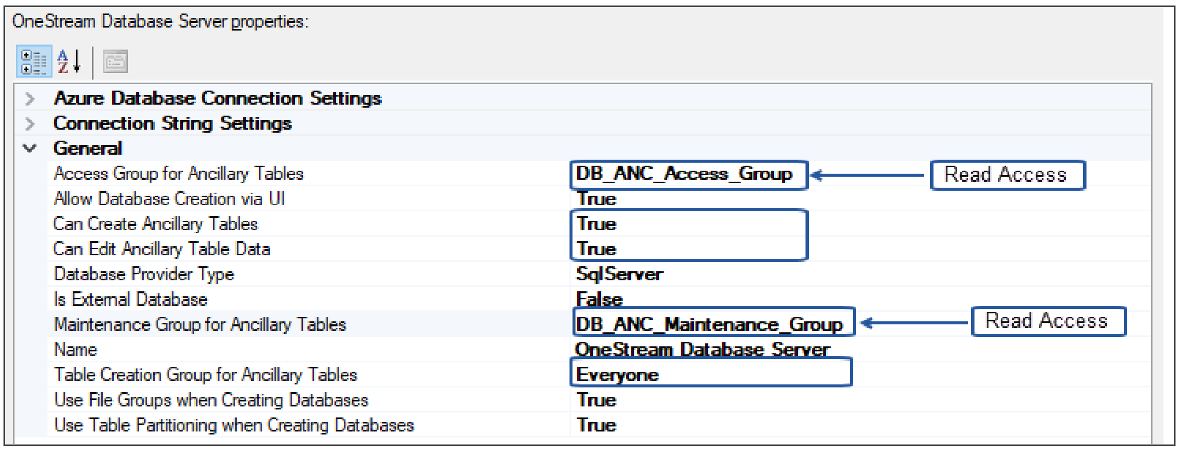
Configure the OneStream Application Server

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 Navigation Center

1. In the OneStream Solution Exchange, go to OneStream Solutions and select the **Navigation Center** tile.

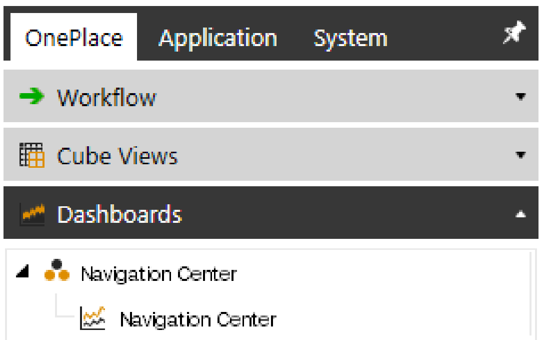
   

2. On the Navigation Center Solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and click **Download**.
4. Log in to OneStream.
5. On the **Application** tab, click **Tools > Load/Extract**.
6. On the **Load** tab, locate the solution package using the **Select File** icons and click **Open**.
7. When the solution's file name appears, click **Load**.
8. Click **Close** to complete the installation.

> **NOTE:** When upgrading to Navigation Center, all narrative reporting documents migrate from Standard Application Reports to Navigation Center.

Set Up Navigation Center

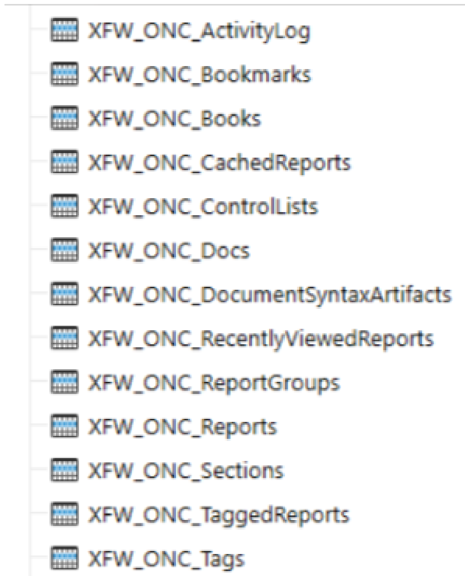
- In OneStream, click **OnePlace** > **Dashboards** > **Navigation Center** > **Navigation Center**.



Create Tables

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

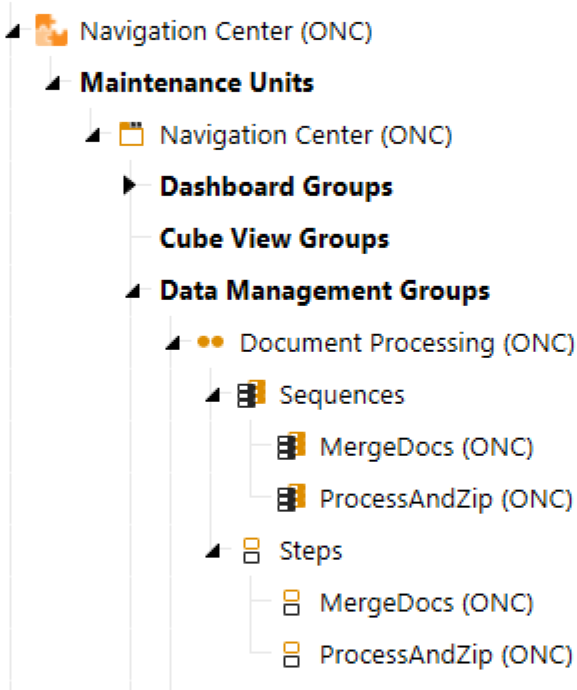
   This step may be necessary when upgrading even if tables are already present. Navigation Center does not drop existing tables but modifies table structures and adds new ones if necessary.



2. When setup is complete, click **Step 2: Launch Solution** to open Navigation Center.

Package Contents

The Workspaces Maintenance Unit provides the user interface for Navigation Center and includes the required Dashboard Groups, Components, Data Adapters, Parameters, and files. The following **Data Management Sequences and Steps** are created in the Navigation Center workspace 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.


Navigation Center (ONC)
Maintenance Units
Navigation Center (ONC)
Dashboard Groups
Cube View Groups
Data Management Groups
Document Processing (ONC)
Sequences
MergeDocs (ONC)
ProcessAndZip (ONC)
Steps
MergeDocs (ONC)
ProcessAndZip (ONC)

Settings

The Settings pages contain key properties that guide administration, including Security Management, Report Security, Narrative Book Management, and Uninstall options.

Security Management

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

Navigation Center:

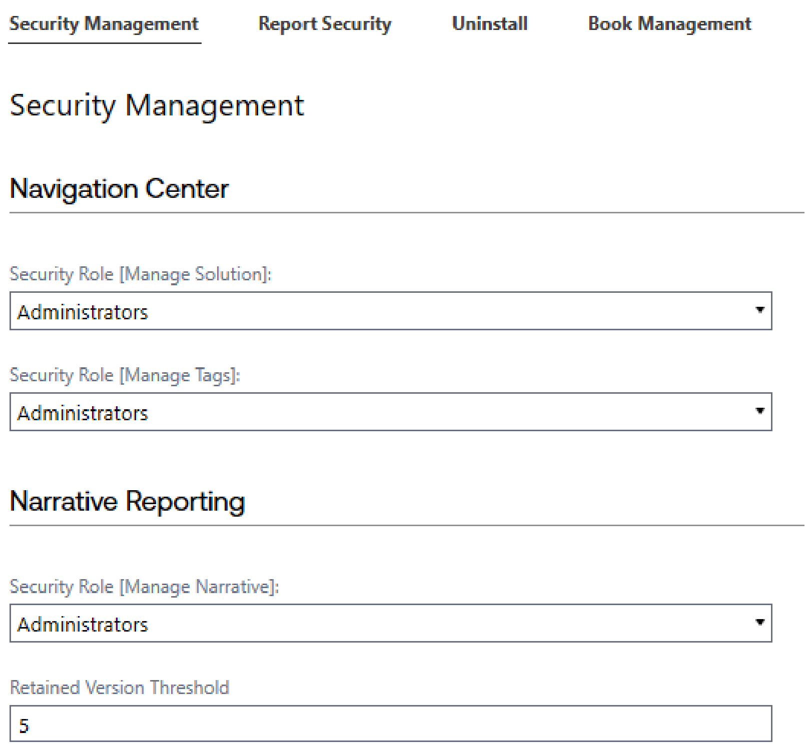
- **Security Role [Manage Solution]**: Determines which security group can manage the solution
- **Security Role [Manage Tags]**: Determines which security group can manage tags

Narrative Reporting:

- **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

Set Security Group Access

1. Select the drop-down menu and choose a security group.
2. Click the **Save** button.

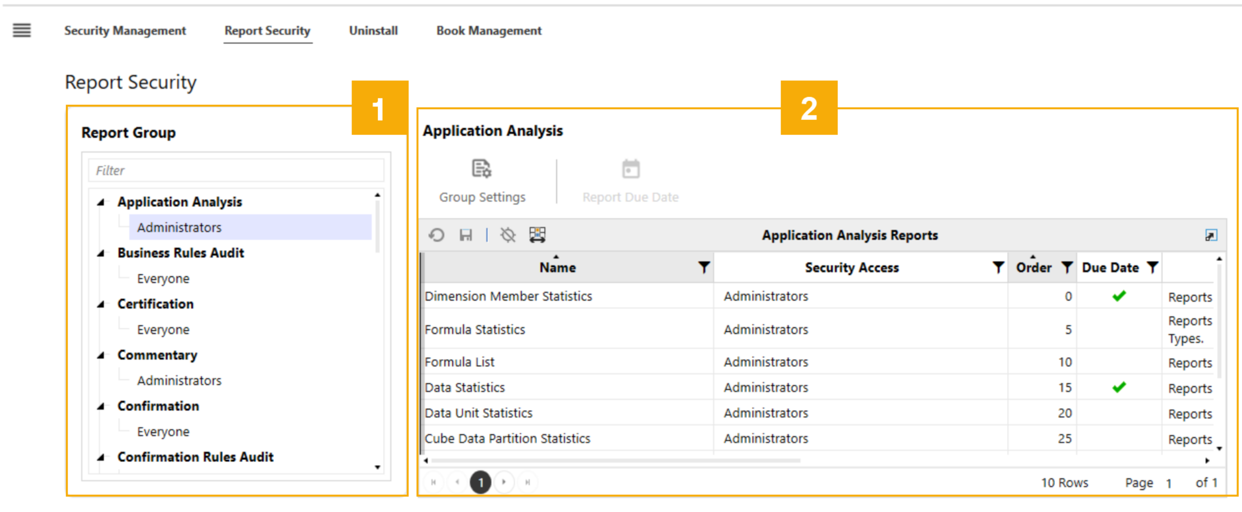


Report Security

Administrators, or users in a security management role, can use the **Report Security** page to:

- Set security access by user role for report groups and individual reports.
- Set the order in which report groups and their respective reports display in the Report List pane. See Report List Pane.
- Customize Report Overview descriptions.

Report Security Overview



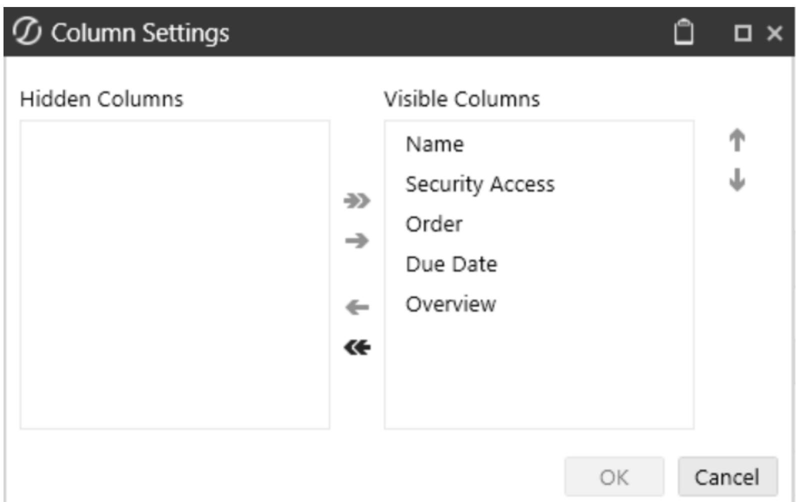
The Report Security page includes two panes:

1. **Report Group**: View a complete list of report groups and the current security group assigned.
2. **Reports Pane**: View all reports within the selected group. After you select a group, the **Group Settings** icon displays. See Set Report Groups and Report Security Access.

Reports Pane

Button Bar

1. **Cancel**: This removes changes made to the report groups or reports since the last save. This icon is inactive in Navigation Center.
2. **Save**: This saves changes to report groups or reports. Changes are saved automatically so this icon will display as inactive.
3. **Deselect All**: This removes your selections.
4. **Column Settings**: This is used to select the columns to display in the Reports pane. Click the **Column Settings** icon to specify the columns you want to view in the grid.



Columns

The Reports grid displays the following information for each report:

1. **Name**: The name of the report within the selected report group.
2. **Security Access**: This determines who can access the report within the specified report group.
3. **Order**: The order the report will be shown in the Report Group.

4. **Due Date**: The date the report is due.

5. **Overview**: The custom report description.

Set Security Access and Display Order

Security access settings determine which report groups and associated reports display to users. Display order, using the **Order** field, modifies the ranking of report groups and reports within the group. The lower the number the higher the sequential display ranking, starting with zero. If a display order is not set, report groups and reports display alphabetically.

> **NOTE:** Only reports the user has access to will display in the report group.

Report Groups

Use the **Report Groups** pane to set security access and display order for report groups.

> **NOTE:** If a user does not have security access to a report group, they will not see that report group, or its reports, in the Report List pane. See Report List Pane.

Follow the below steps to set security access and display order for report groups:

1. From the **Report Security** page, select a report group from the **Report Groups** pane. Information for the reports associated with the group will load in the Reports pane.

2. Click the **Group Settings** icon.

3. In the **Update Group Settings** dialog box:

- Select a security group from the Security Access drop-down menu.
- Type the a number in the **Order** field above the Reports pane.

> **NOTE:** When the same rank is entered, all subsequent ranks advance in order.

4. Click the **Save** button.

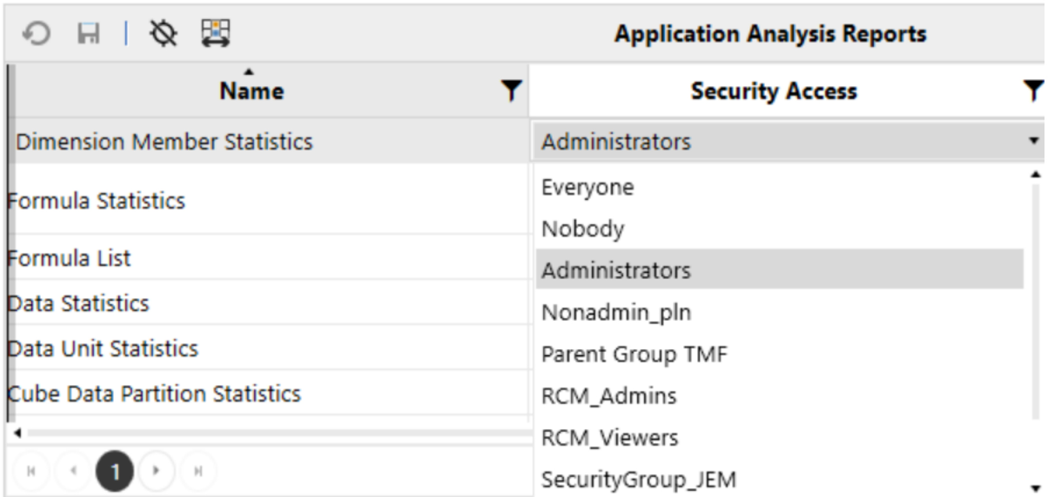
Reports

Use the **Reports** pane to set security access and display order for each report in the selected report group.

> **NOTE:** If a user does not have security access to a report group, they will not see that report group, or its reports, in the Report List pane. If they have access to at least one report within the group, the group name will display. See [Report List Pane](#).

Follow these steps to set security access and display order for individual reports:

1. From the **Report Security** page, select a report group from the **Report Groups** pane. Information for the reports associated with the group will load in the Reports pane.
2. To set individual report security:
   a. Select the report from the grid and double click the **Security Access** column to generate a drop-down.
   b. Choose the appropriate security group.



c. Click the **Save** icon in the Reports pane button bar.

3. To set individual report display order:

    a. Select the report from the Reports grid and double click the **Order** column to edit the text field.

    b. Type a number to set the sequential ordering of the report within the report order. For example, the following shows a report given an order of 0, which is the lowest order number for all the reports in the group, so it would appear first in the report display order.

    c. Click the **Save** icon in the Reports pane button bar to save your changes.

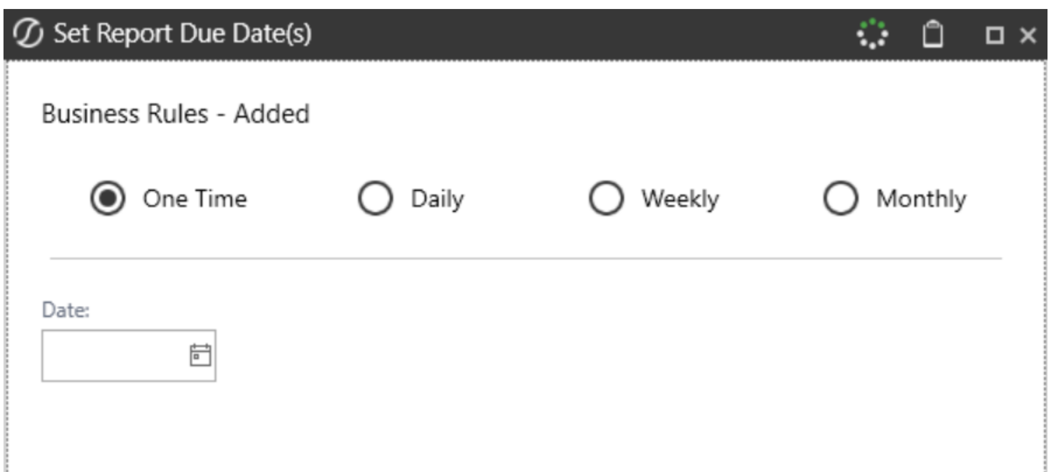
Set Report Due Dates

Set Due Dates on reports so Navigation Center users easily see which reports are coming due.

> **NOTE:** When a due date is set, a task is created in Task Scheduler where you can set the preferred time zone for your due date. See Task Scheduler.

To set a due date for a report, follow these steps:

1. Select a report group from the **Report Group** pane.
2. Use the **Reports Pane** to select a report which enables the **Report Due Date** icon.
3. Click the **Report Due Date** icon to open the **Set Report Due Date(s)** dialog box.
4. In the **Set Report Due Date(s)** dialog box, select the frequency of your due date:



- **One Time**: When you select One Time, choose a date.
- **Daily**: When you select Daily, choose a Starting date and repeat frequency. Optionally, you can select an Expire on date.

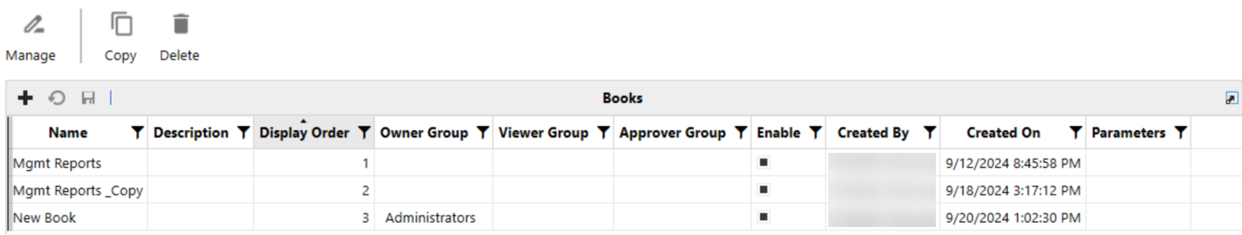
  - **Weekly**: When you select Weekly, turn on the preferred days of the week and choose a repeat frequency. Optionally you can select an Expire on date.
  - **Monthly**: When you select Monthly, turn on the preferred months and choose a repeat frequency, either a specific date or the first, second, third, fourth, or last, day of a month. Optionally, select an Expire on date.

5. Click the **Save** button.

Book Management

Administrators and Book Owners can create and manage report books using the **Narrative Books** page. Navigate to the page from **Settings** > **Book Management**. Follow this guidance to manage books:

- Book and Section names can be duplicated.
- Each book can contain multiple sections.
- A section must only be assigned to one book.
- Two levels are supported in the Tree Navigation. 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 cannot be duplicated in a single book, but can be duplicated across books.



The book grid displays the following column information:

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

> **NOTE:** Book Names and Descriptions can be duplicated. Neither can exceed 500 characters.

- **Display Order**: The order the book is displayed in the grid and home screen book drop-down.
- **Owner Group**: The security group that owns the book and all documents within the book.
- **Viewer Group**: The security group that can view the book and all documents in the book.
- **Approver Group**: The security group that can approve the book and all documents in the book.
- **Enable**: Determines whether the book is displayed in the Tree Navigation. Set to **True** (default) to display the book or set to **False** to keep the book hidden from the navigation.
- **Created by**: The user who created the book.
- **Created on**: The date the book was created.
- **Parameters** (optional): A field that can be referenced in a document to ensure data accuracy.

Narrative Books Management

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

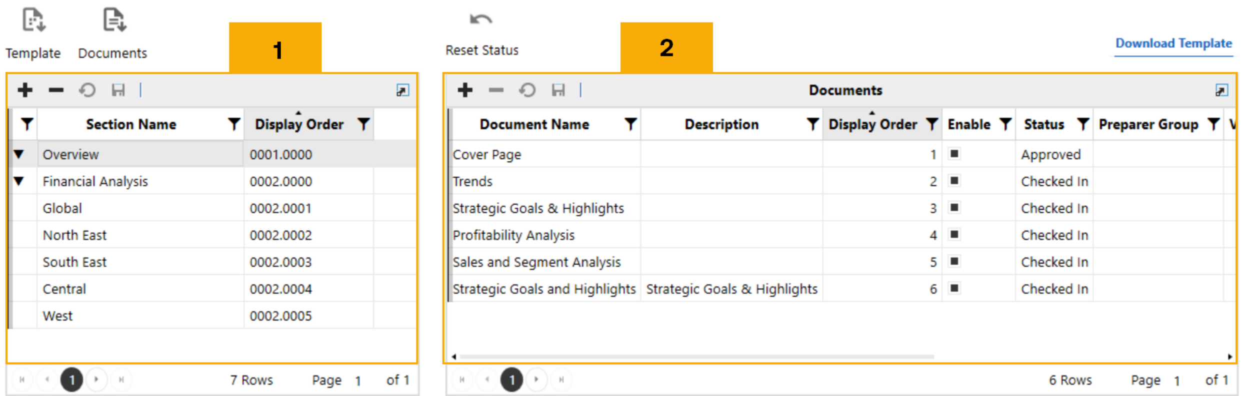
- **Manage**: This opens the Sections and Documents page where you can edit the structure of the book. See Sections and Documents.
- **Copy**: This duplicates the selected book and associated documents.

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

- **Delete**: This removes the book and all associated documents, regardless of statuses, permanently.
- **Reset Status**: Accessible from the Sections and Documents page, this icon sets the selected document back to checked-in status.

Sections and Documents

Admins and book owners can manage the structure of narrative books using the **Sections and Documents** page. First, use the Sections Grid to create the structure of the book. This structure is mirrored in the Main Display through the Tree Navigation. After your structure is defined, use the Documents Grid to upload documents to the database and to create your narrative book.



1. **Section Grid**: This displays the sections within a narrative book and shows the following column information:

    - **Section Name**: The name of the section.
    - **Display Order**: The order the section is displayed in the book and in the Tree Navigation. When a column decimal place end in 0, such as 1.0 or 2.0, a new section indicator ▼ is automatically added to the section indicating a top level section.

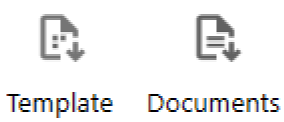
2. **Document Grid**: This displays the documents in each section and contains the following column information:

    - **Document Name**: The name of the document. Names should not be duplicated within the book.
    - **Description**: The description of the document.
    - **Display Order**: The order in which the document is displayed within the section and in the Tree Navigation. Using 0 is not allowed.
    - **Enable**: This determines whether the book is displayed in the tree navigation. Set to **True**, the default, to display the book or set to **False** to keep the book hidden from the navigation.

- **Status**: Displays the current status of a document.
- **Preparer Group**: The security group that can edit and submit the document for approval. This optional security group is in addition to the book Owners group and can be left blank.
- **Viewer Group**: The security group that can view the document. This optional security group is in addition to the book Viewer group and can be left blank.
- **Approver Group**: The security group who can approve the document. This optional security group is in addition to the book Approver group and can be left blank.
- **Source File Name**: The name of the source file including the file extension.
- **Imported**: This determines whether or not the file has been imported into the table.
- **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** (optional): A field that can be referenced in a document to ensure data accuracy.

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.



Template

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

Before importing, know:

- 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 using the following fields:

	A	B	C	D	E	F	G	H	I
1	Type	Name	Description	Preparer Group	Viewer Group	Approver Group	Enable	Source File Name	Mode
2	Root	Overview							
3	Document	Cover Page		Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	Cover Page.xfdoc.docx	Text Editor
4	Document	Trends		Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	Trends.xfdoc.docx	Text Editor
5	Document	Strategic Goals & Highlights		Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	Stragetic Goals and Highlights.xfdoc.docx	Text Editor
6	Document	Profitability Analysis		Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	Profitability Analysis.xfdoc.docx	Text Editor
7	Document	Sales and Segment Analysis		Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	Sales and Segment Analysis.xfdoc.docx	Office (Processed)
8	Root	Financial Analysis							
9	Section	Global							
10	Document	TrendsG	Trends	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	GTrends.xfdoc.docx	Office (Processed)
11	Document	SGHG	Strategic Goals & Highlights	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	GStragetic Goals and Highlights.xfdoc.docx	Office (Processed)
12	Section	North East	North East						
13	Document	TrendsNE	Trends	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	NETrends.xfdoc.docx	Office (Processed)
14	Document	SGHNE	Strategic Goals & Highlights	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	NEStragetic Goals and Highlights.xfdoc.docx	Office (Processed)
15	Section	South East	South East						
16	Document	TrendsSE	Trends	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	SETrends.xfdoc.docx	Office (Processed)
17	Document	SGHSE	Strategic Goals & Highlights	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	SEStragetic Goals and Highlights.xfdoc.docx	Office (Processed)
18	Section	Central	Central						
19	Document	TrendsC	Trends	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	CTrends.xfdoc.docx	Office (Processed)
20	Document	SGHC	Strategic Goals & Highlights	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	CStragetic Goals and Highlights.xfdoc.docx	Office (Processed)
21	Section	West	West						
22	Document	TrendsW	Trends	Sample_Preparer	Sample_Viewer	Sample_Approver	TRUE	WTrends.xfdoc.docx	Office

- **Type**: This describes the structure of the book. Choose from 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 sub-sections of a book.
  - **Document**: This defines the document.
- **Name**: The name of the section or document to be created.
- **Description**: The description of the document. Section descriptions are not required.
- **Preparer Group**: The security group that can edit and submit the document for approval.
- **Viewer Group**: The security group that can view the document.
- **Approver Group**: The security group that can approve the document.
- **Enable**: True or False field indicating if a document will display in the Tree Navigation. Default value is True when 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.
- **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.

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

Uninstall

Use the Uninstall feature to uninstall the Navigation Center interface or the entire solution. If done as part of an upgrade, any modifications performed on standard Navigation Center 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 Navigation Center, 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 Navigation Center without removing the data tables. The Release Notes indicate if a reinstall over the existing installation is supported.

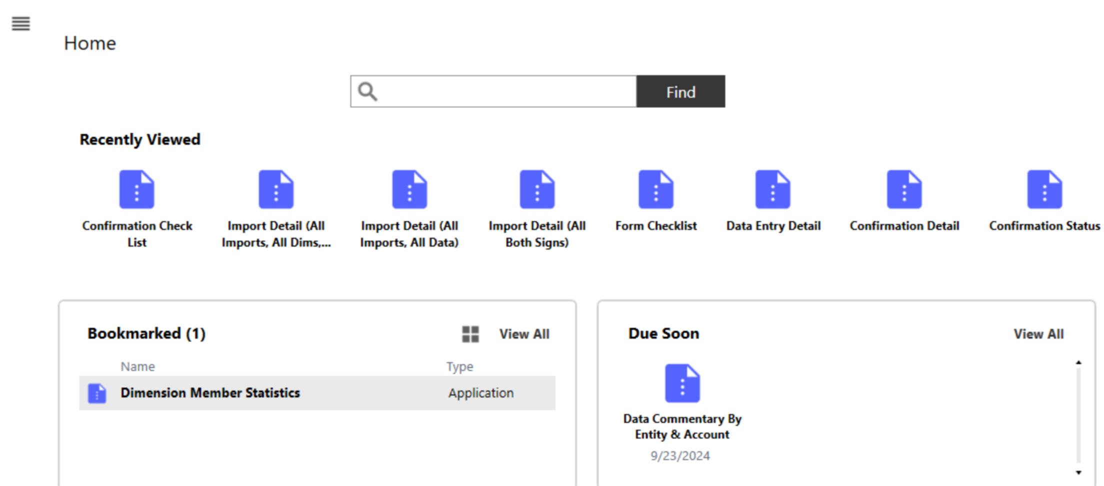
   - Use the **Uninstall Full** button to remove all related data tables, data, and Navigation Center dashboards and business rules. Choose this option to completely uninstall Navigation Center or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

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

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

Home

Use the Navigation Center Home dashboard to navigate the solution and see recently viewed, due soon, and bookmarked reports.



1. Navigation Pane

- **Home**: Navigate to different areas of Navigation Center, access Recently Viewed, Bookmarked, and Due Soon reports
- **Narrative Reporting**: Access Narrative Reporting dashboard
- **Application Reports**: Access Application Reports
- **Security Audit Reports**: Access Security Audit Reports
- **System Reports**: Access System Reports

- **Bookmarked Reports**: Access all bookmarked reports
- **Tags**: View available tags

NOTE: Tabs displayed depend on your security access settings. See Report Security.

2. Search bar

Type in the search bar field and click **Find** to quickly locate reports and tags. Search results are displayed in a grid.

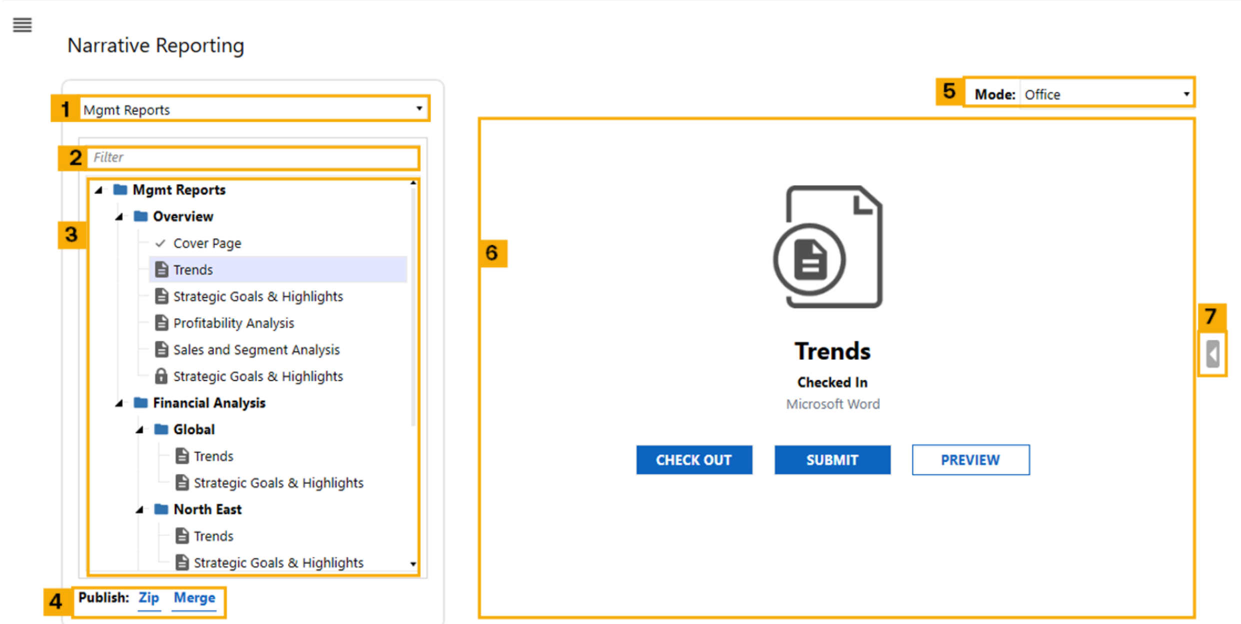
3. Main Display

- **Recently Viewed**: Reports you have recently viewed. Click any report to open it in Report Viewer. See Report Viewer.
- **Due Soon**: Displays a list of reports coming due 10 days from the current date. Click any report to open it in Report Viewer. See Report Viewer.
- **Bookmarked**: List of reports you have saved using the bookmark functionality. Use the Bookmarked Reports section to:
  - See all bookmarked reports in a grid view by clicking **View All**.
  - Select any report from the list, or in the grid view, and quickly open it in Report Viewer. See Report Viewer.
  - View the list of reports as icons by clicking .

Narrative Reporting

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. **Narrative Books**: Drop-down list of enabled books. List selection varies by security group assigned to the user and book.
2. **Filter**: Search for documents or a section within the selected book.

3. **Tree Navigation**: Visual hierarchy displaying sections and documents of the selected book.
4. **Publish**: Download finalized versions of books and documents. See Publish Documents.
5. **Mode**: Drop-down used to select your preferred editing application. See Sections and Documents.
6. **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
7. **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.

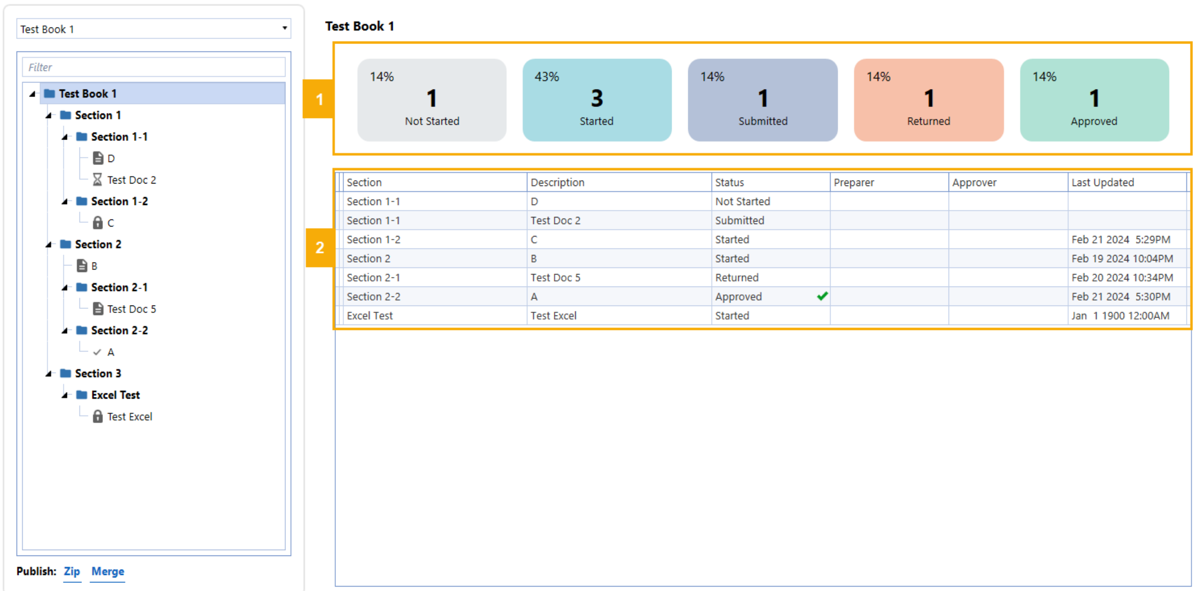
Status	Status Defined	Tree Navigation Icon	Main Display Icon
Checked-In	Document is available to check-out for edits.		
Checked-Out	Document is currently checked-out by another user.		
Submitted	Document has submitted for approval by a user.		

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.
    - **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.
    - **Approved**: Documents that have been reviewed and accepted so their status is Approved.
    - **Returned**: Documents that have been reviewed and returned to the user who submitted the document for approval, setting the status to Returned.
2. **Summary Grid**: An overview of the documents within the section or book selected.

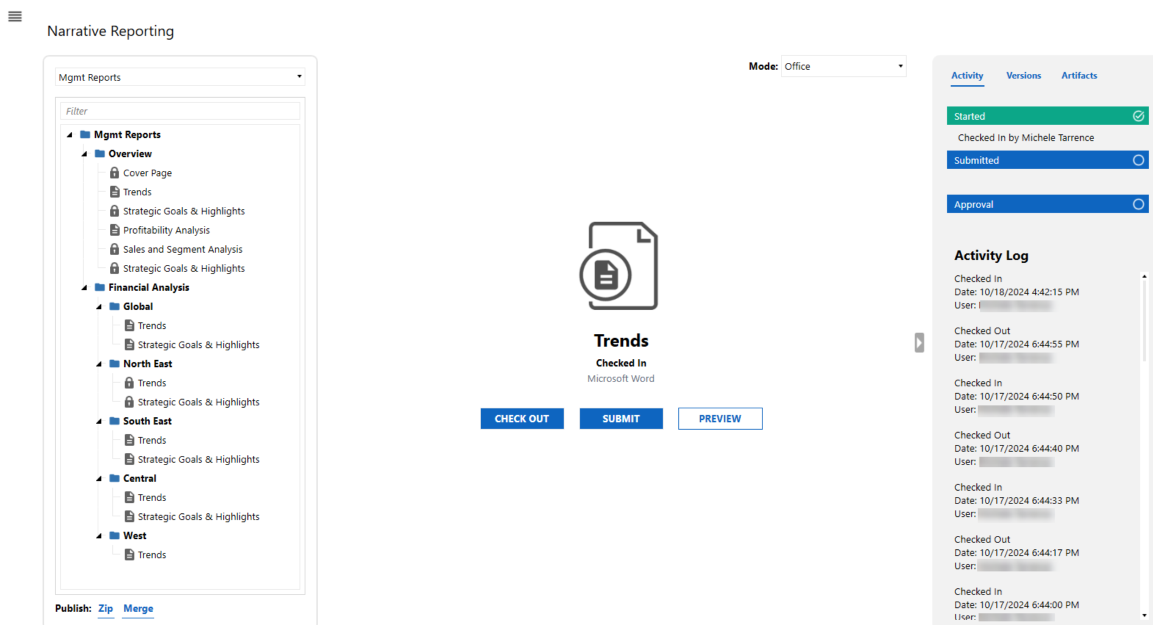
- **Section**: Name of the section.
- **Description**: An overview of the document. If the description field for the document is left empty by an administrator or book owner, the document name will populate.
- **Status**: Current document status.
- **Preparer**: User who prepares the document. If the 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.



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 OUT** 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 save changes.

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:

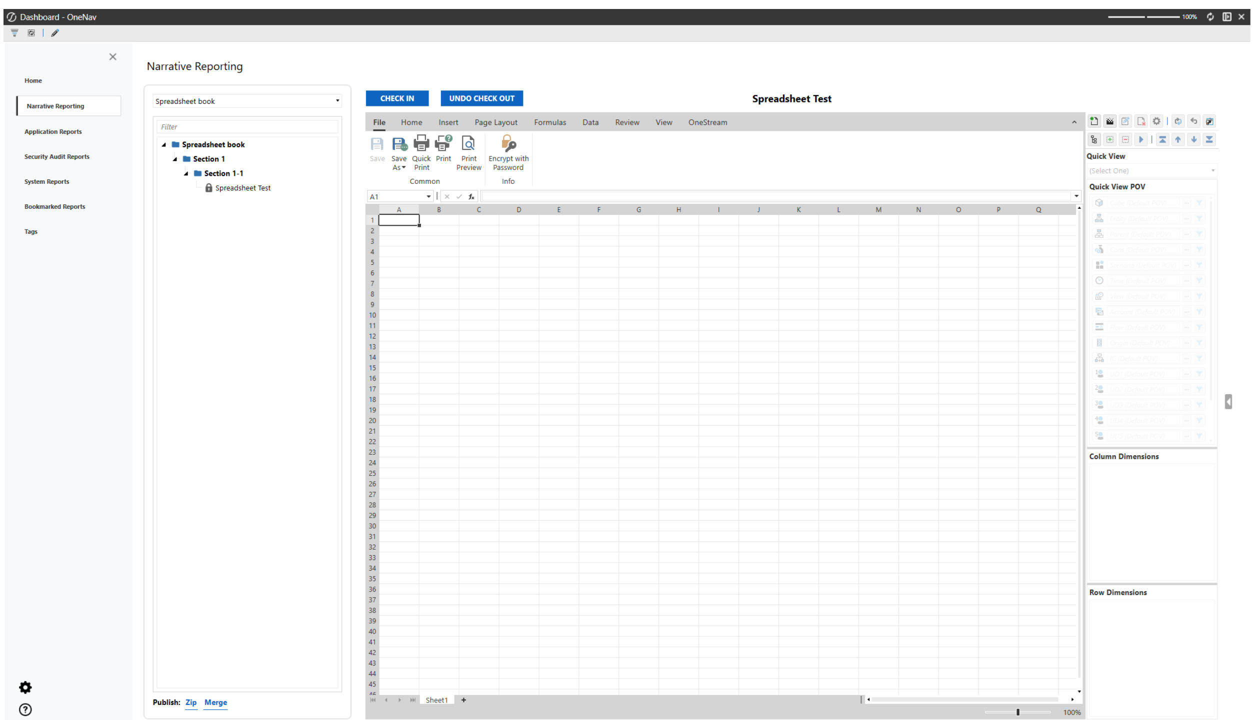
1. Save the document.

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

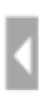
When a document is ready for final approval, from the Main Display, click the **SUBMIT** button. The document is locked from further changes.

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.

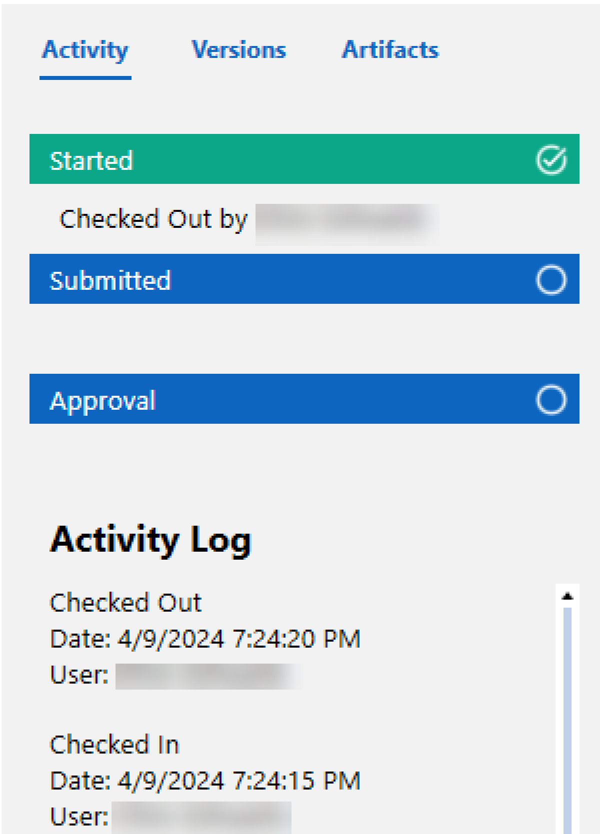
Details Pane



Use this icon on the right side of the screen to access the Details pane.

While viewing a document, use the Details Pane to see the Activity, Versions, and Artifacts of a document.

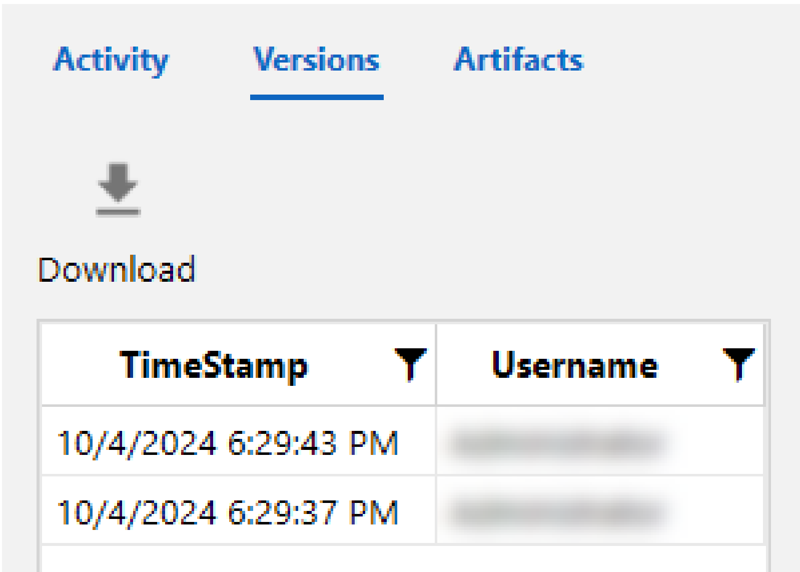
Activity Tab



Select the **Activity** tab to view the following document information:

- **Approval Flow**: Displays the status of the document
- **Activity Log**: Displays all activities for the selected document including:
    - **Actions**: Specific activity that occurred. Logged actions include when a book is created or when a document is:
        - Created
        - Saved
        - Previewed
        - Checked Out
        - Returned using the UNDO CHECK OUT button
        - Checked In
        - Submitted
        - Returned
        - Approved
    - **Date**: Day and time of the modification using the system date and time of the user
    - **User**: Name of user who performed the activity

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:

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

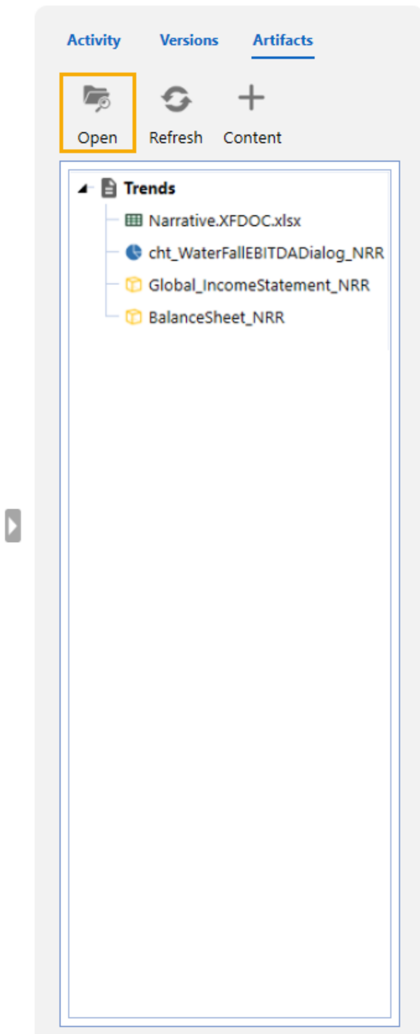
Use the **Download** button to download previous versions of the document

Artifacts Tab

Use the **Artifacts** tab to quickly view and edit all artifacts in the selected document and add new artifacts by copying and pasting variable syntax.

Edit an Artifact

1. Select an artifact.
2. Click the **Open** button.

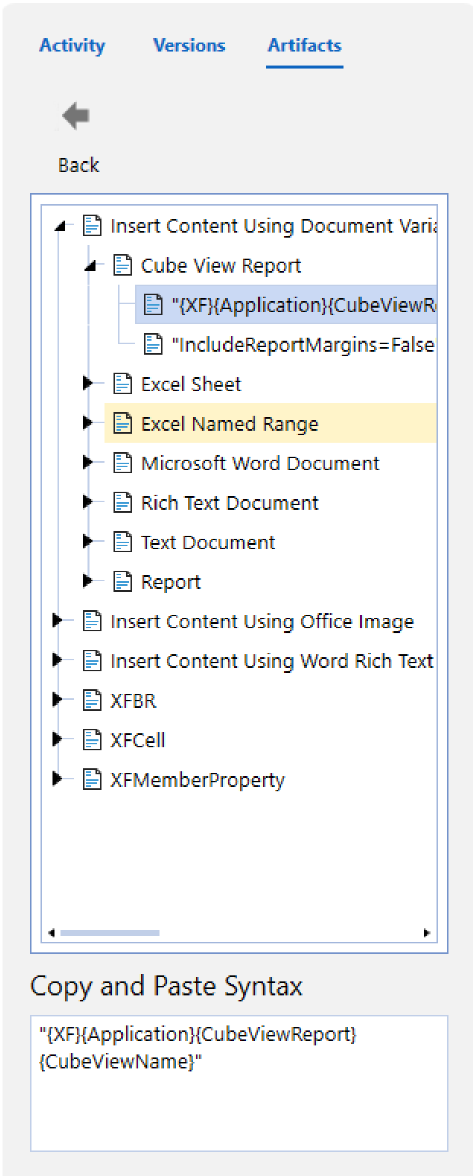


3. Make your changes and save. When you refresh your document, your changes will be incorporated.

Add Content

Easily embed new artifacts, like charts and spreadsheets, without leaving your narrative document. Follow these steps to add new artifacts:

1. Click the **Content** button.
2. Select a syntax from the tree. See Document Variable Setup.
3. Copy the syntax from the **Copy and Paste Syntax** field.



4. Paste the syntax into your document, and edit it with relative content.

> **NOTE:** Syntax in PowerPoint documents must be embedded in images.

5. Save your changes, and click the **Refresh** button in the **OneStream** tab to see your changes incorporated.

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.

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

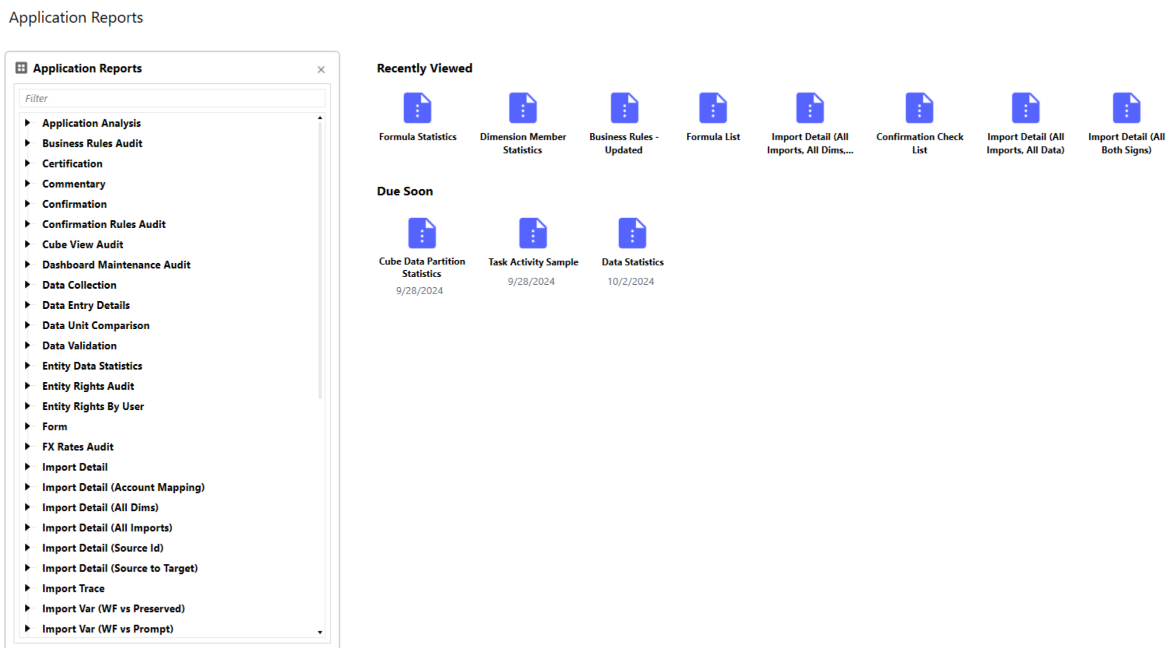
Rather than downloading and sharing individual documents, you can download a merged version of a book or individual section using the merge feature. File types supported by the merge feature include Microsoft Word and PowerPoint.

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.

View and Run Reports



The Application, System, and Security Report dashboards include the following components:

- **Report List Pane**: A complete list of available reports grouped by type.
- **Recently Viewed**: Area displaying the last 8 reports you viewed.
- **Due Soon**: Area displaying reports coming due 10 days from the current date so you can complete your work on time. Click **View All** to see a complete list of reports in a grid.
- **Reports Viewer Pane**: Pane that displays after a report is selected and enables you to input parameters and run the report.

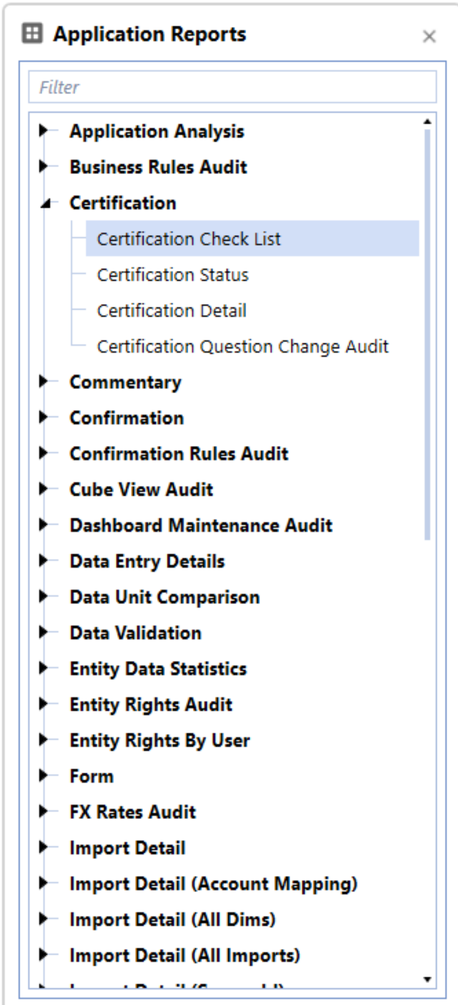
From the dashboard you can print, view, or export reports.

Report List Pane

The **Report List** pane lists the report groups you can access based on your security access settings. See Set Security Access and Display Order.

Use the pane to do the following actions:

- Select any group to expand and view a complete list of reports for the chosen group
- Use the **Filter** box to locate a specific report or report group
- Click any report from an expanded group to open it in the Report Viewer. See Report Viewer Pane.
- Click the **Close Pane** icon to close the Report List Pane to gain additional space to view the report you want to run and click to expand the Report List Pane.



Recently Viewed

Reports you have recently accessed display under **Recently Viewed**. The Recently Viewed list includes the last 8 viewed reports.

Due Soon

The Due Soon section displays reports coming due within 10 days of the current date. Select any report to open it in the Report Viewer Pane.

Due Soon Dashboard

When more reports are coming due beyond those displayed in Due Soon, click **View all** to view a complete list of reports coming due. The Due Soon Dashboard displays a grid with the following information:

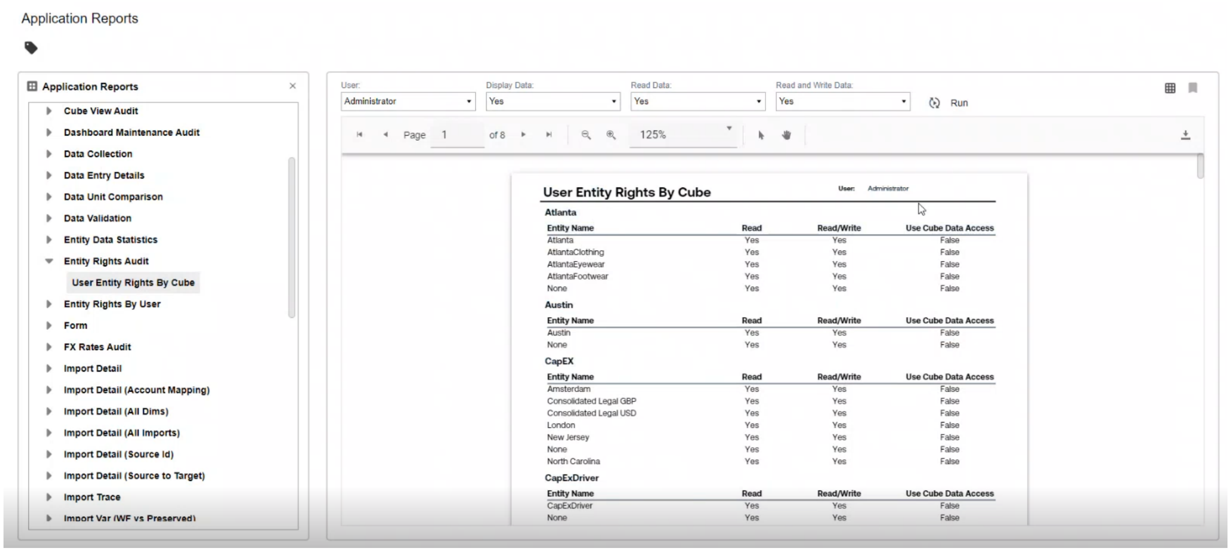
- **Name**: Title of the report
- **Type**: Report type
- **Group**: Name of the group to which the report belongs
- **Due Date**: Date the report is due for completion

Select any report from the grid to open it in the Report Viewer.

Report Viewer Pane

After you select a report from Recently Viewed, Due Soon, or the Report Lists Pane in Application Reports, Security Audit Reports, or System Reports, the **Report Viewer** displays the selected report. Filters show at the top of the pane for most reports. Use the filters to customize the report, then click **Run** to display the report. At any time, change the filter criteria and click **Run Report** again to update the data that displays in the report.

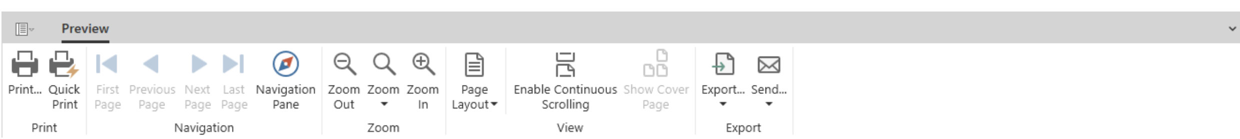
> **NOTE:** Set your workflow POV before running a report.



Customize Report Viewing

Preview

While viewing a report, click **Preview** to use the buttons in the Report Viewer button bar. The button bar enables you to navigate through the report, set viewing options, zoom in and out of parts of the report, and print or export the report.



Print

Use the **Print** and **Quick Print** buttons to control report printing. The **Print** button displays the Windows **Print** dialog box. Set the printer and other print settings for precise printing. Click **Quick Print** to send the report to your default printer with specified print settings.

> **NOTE:** You can also click  to print a report.

Navigation

Use these buttons to control navigation through the report.

Click **Previous Page** and **Next Page** to navigate through the document one page at a time. Click **First Page** and **Last Page** to go to the first and last pages in the document.

Some reports enable you to find specific data in a report quickly. To do so, click **Navigation Pane** to display a navigation pane next to the Report Viewer, which allows you to find specific data in the report. See Report Navigation.

Zoom

Use these buttons to control the magnification for the report. The **Zoom In** and **Zoom Out** buttons increment or decrement the magnification. Use the **Zoom** button to view the report at a specific magnification, view the entire page, or display pages using the entire Report Viewer pane width.

View

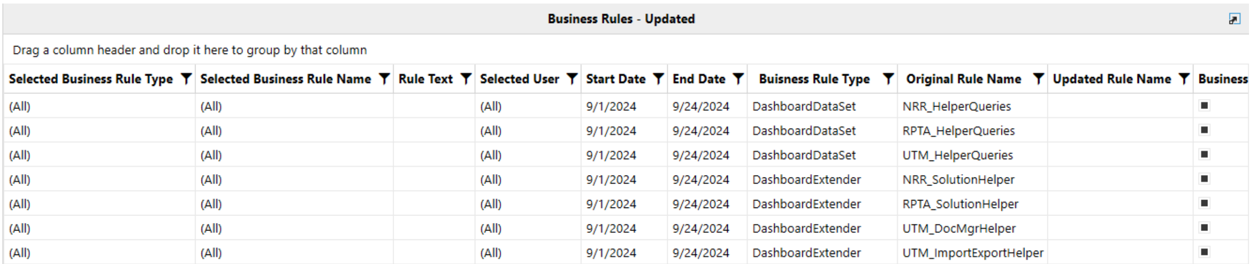
Use the **Page Layout** button to specify the number of pages to display within the Report Viewer pane or to select the number of pages to show side-by-side. The **Enable Continuous Scrolling** button lets you control scrolling between pages in single or double-page view. Click **Show Cover Page** to navigate to the first page of the current report.

Export

The Export buttons allows you to export the document for sharing with others. Click **Export** and select an output type to export the document in the specified file format, using the **Export Document** dialog box to specify the location for the output file. Click **Send** to export the document in an available format and send the document in an email.

Grid View

By default, reports are generated as a PDF. Click the **Grid view** icon to view the report data in grid format, similar to Excel.



Business Rules - Updated

Drag a column header and drop it here to group by that column

Selected Business Rule Type	Selected Business Rule Name	Rule Text	Selected User	Start Date	End Date	Buisness Rule Type	Original Rule Name	Updated Rule Name	Business
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardDataSet	NRR_HelperQueries		■
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardDataSet	RPTA_HelperQueries		■
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardDataSet	UTM_HelperQueries		■
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardExtender	NRR_SolutionHelper		■
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardExtender	RPTA_SolutionHelper		■
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardExtender	UTM_DocMgrHelper		■
(All)	(All)		(All)	9/1/2024	9/24/2024	DashboardExtender	UTM_ImportExportHelper		■

Deselect All

Click the **Deselect All** icon to remove your selections.

Column Settings

Click the **Column Settings** icon to specify the columns you want to view in the grid.

Maximize Report Viewer

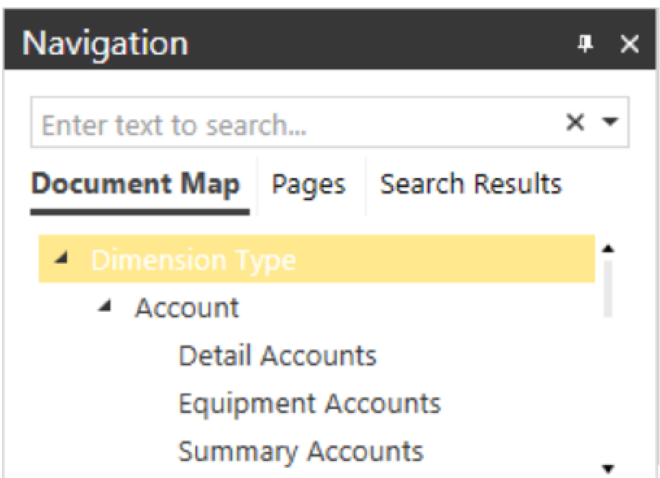
Click the **Toggle Component Size** icon to expand the report to the full size of your window. Click it again to return the viewer to normal size.

Report Navigation

Use the **Report Navigation** pane in the Report Viewer to refine or locate data in your report. This is useful when working with long reports, or when you need find specific data in a report. The pane contains the following tabs:

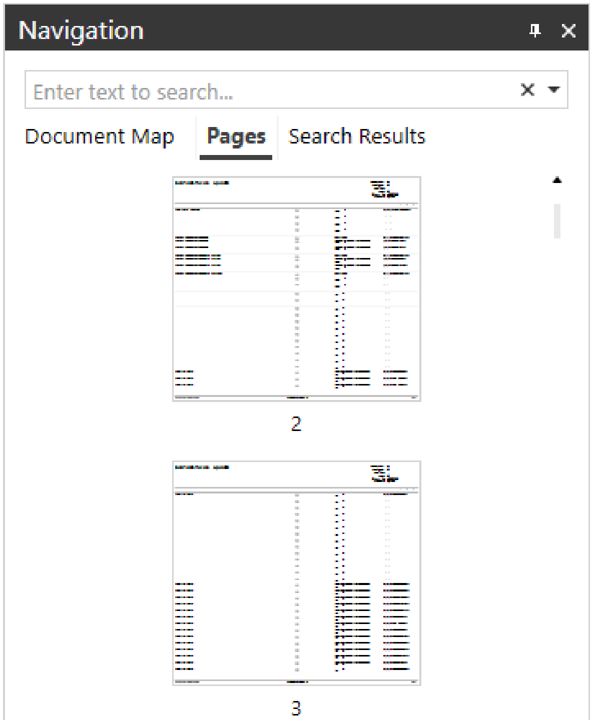
Document Map Tab

Use this tab to view a heading outline of the report and navigate to specific headings in the current report. Click the name of the header in the Document Map tab to navigate to a specific header. All heading levels are displayed in the tab, allowing you to move between headings in the report.



Pages Tab

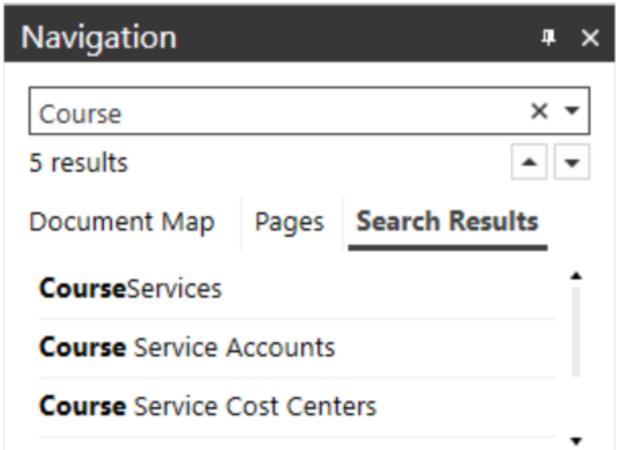
Click this tab to view thumbnail sketches of each page in the current report. Click on any thumbnail to navigate to that page.



Search Results

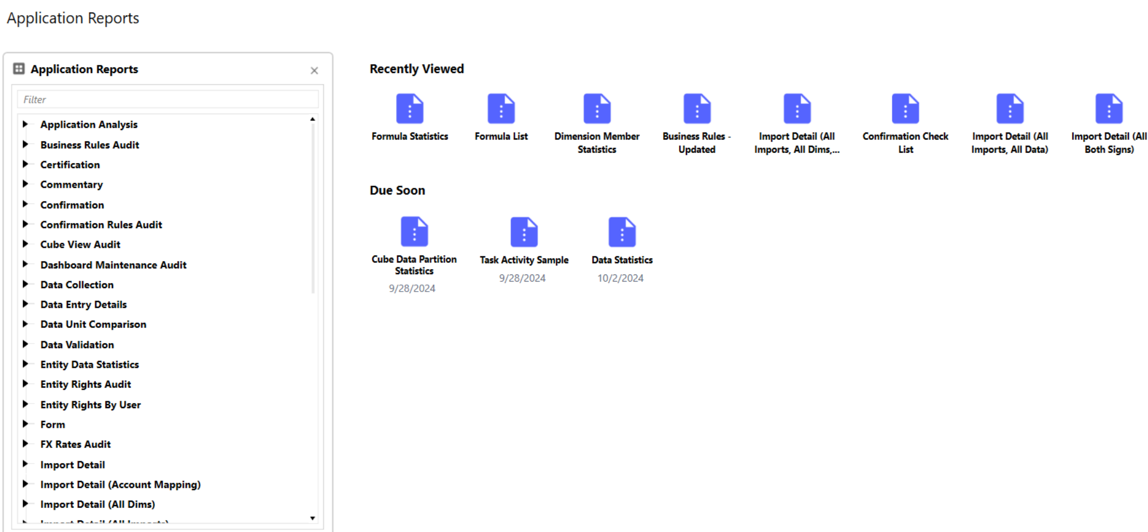
- The **Navigation** pane allows you to search for specific data and see the number of matches in the document. Use the up and down arrows in the search results to navigate through the search matches.
- The **Search Results** tab shows each match in the document. By going through search results, the **Search Results** tab highlights the current match, and the report automatically navigates to the page containing the match.

> **NOTE:** Pages and Search Results features are only available in the OneStream Windows application.


Navigation
Course
5 results
Document Map
Pages
Search Results
CourseServices
Course Service Accounts
Course Service Cost Centers

Application Reports

The Application Reports dashboard enables you to view and run all Standard Application Reports. These reports provide information about the system such as Data Statistics.



This remainder of this section:

- Describes the report groups in Application Reports.
- Describes any available filters for each report group. When you select a report in a group, most reports display filters for you to customize the data in the report.
- Summarizes the reports in each report group.

See View and Run Reports to learn how to generate any of these reports.

Application Analysis Reports Group

Use the Application Analysis group reports to understand how effectively the data entities in OneStream, such as dimensions and cubes, are implemented to meet your organization's needs.

Application Analysis Group Report Filters

Year
The year for data in the report. Click the **Year** drop-down to select the year, then click **Run Report**. This filter is available on all reports in this group except Dimension Member Statistics, Formula Statistics, and Formula List.

Application Analysis Group Reports

Dimension Member Statistics
This auto-generated report provides an overview of the number of dimension members defined in OneStream. It displays the current dimensions and number of members for each dimension.

Formula Statistics
This report shows member formula statistics such as pass#, stored counts, dynamic counts, ratio of stored and dynamic accounts, sign flip, and CPU usage for dimension names. Formula statistics are shown in the report by dimension type.

Formula List
This report shows the contents of member formulas. Formula contents are displayed by name and type for each dimension. This report shows you the contents of each defined formula to assess if improvements or changes to a formula are needed.

Formulas provide intuitive organization and promote the reusability of dimensions with their associated calculations across multiple cubes. They also enable parallel processing for performance optimization using advanced multi-threading that runs multiple formulas at the same time.

Data Statistics
Reports cube data statistics for cube records, imported records, and explosion factor. Explosion factor is the number of cube rows divided by the number of imported staging rows, and is calculated automatically.

Data Unit Statistics
Reports the number of data records by entity name for each cube. To see more Data Unit details in OneStream, right-click on a data cell in a cube view.

See the *Data Unit* section in *Workflow* in the *Design and Reference Guide* for more information on data units.

Cube Data Partition Statistics
Reports cube data records by entity, sorted by partition number.

Stage Data Partition Statistics
Reports data records for each stage profile, sorted by partition number.

Task Activity Sample
Reports statistics for the top 200 longest running application tasks by stage load, process cube, consolidate, and the name of the application server that ran the task.

Data Statistics (Binary)
Reports cube data statistics for cube records, imported records, and explosion factor. This report is only for applications using binary storage.

Explosion factor is the number of cube rows divided by the number of imported staging rows, and is calculated automatically.

Data Unit Statistics (Binary)
Reports data unit statistics grouped by entity name, then by cube name. This report is only for applications using binary storage.

Business Rules Audit Reports Group

Use reports in the Business Rules Audit group to monitor business rule activity for audits.

Business Rules Audit Group Report Filters

These filters apply to all reports in the Business Audit Report group.

Business Rule Type
Select a business rule type from the list or select (All) to include all business rule types in the report.

See *Business Rule Types* in the *Application Tools* section of the OneStream *Design and Reference Guide* for a detailed description of each business rule type.

Business Rule Name
All business rules that belong to the specified business rule type. If you specify (All) as the business rule type, all business rules are included in the report. Click this drop-down list to include only a specific business rule in the report.

Rule Text
Enter a text string to use as a match string to include business rules whose formula contains that text.

> **NOTE:** Any encrypted business rules are excluded from the report when using a rule text string.

User
Select a user to view the business rules they added, updated, or deleted. Select (All) to view all user activity.

Start and End Date
Select a start and end date range to include only the business rules created during the specified range.

Business Rules Audit Group Reports

Business Rules - Added
This report shows a document map of the business rules type, which business rule was added, the user who made the changes, and the UTC time stamp when the rule was added.

Business Rules - Updated
This report shows if a business rule’s name was modified. A checked box indicates if the business rule is updated. It also shows the user who modified the rule and the UTC time stamp of the modification.

Business Rules Deleted
This report lists business rules deleted from the system. Each deleted rule shows the modified time or date and the user who deleted the rule. Deleted rules are grouped by rule type, then by rule name.

Certification Reports Group

Use reports in the certification group to help understand the relationship between workflows and the certification question sets used in the workflow’s confirmation steps, and to see certification details for workflow descendants.

Certification Group Report Filters

There are no filters for the Check List, Status, and Details reports in the group. Reporting is for all workflows or the current workflow.

The Certification Question Change Audit Report has the following filters:

Change Type
You can specify one change type whose mapping changes you want to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all change types in the report.

Category Name
A drop down list of question types or categories. Select the best option for the question type.

Start Date and End Date
Enter a start and end date range to include records for the specified date range.

Certification Group Reports

Certification Check List
This report lists each workflow and the associated certification profile, with current workflow POV status and all workflow profile descendants.

Certification Status
Grouped by workflow, this report lists the certification groups assigned to each workflow with status for the current workflow and all descendants.

Certification Detail
This report shows the certification status history for the current workflow and all its descendants.

Certification Question Change Audit
This report displays all added changes made to certification properties so you can audit changes made to workflow certification questions.

Commentary Group

Reports in the commentary report group provide details on data attachments, also known as comments, and are added to the currently selected workflow either at the cell level or to an entire data unit within a workflow. Reports show attachments by account within the workflow.

Commentary Group Report Filters

Entity
The name of the entity for which you want to view commentary. Select an entity from the list or leave blank to include all entities within the currently selected workflow.

Account
A named account within the currently selected workflow. Select an account from the list or leave blank to include all accounts within the currently selected workflow.

Attachment Type

Select a specific attachment type or commentary within the currently selected workflow or select (All) to include all attachment types in the report.

Commentary Group Reports

Data Commentary Detail

Lists comments attached to the entities for the current workflow POV. Detailed POV information is listed for each comment.

The report is grouped by entity, then by account. The report shows each entity's selected account and each entity's information includes cube view POV information, flow, IC, and user defined dimension type origin, along with a list of the comments. Information for each comment includes the user who created the comment and the time the comment was made.

Data Commentary By Entity & Account

A list of all comments attached to the entities for the current workflow POV. This report is grouped by entity, then by account. Information for each commentary includes the user who created the commentary and the time the commentary was created.

Workflow Commentary Detail

This report lists all comments attached to the entities for the current workflow POV. Detailed POV information is listed for each comment. The report is grouped by entity, then by account.

The report shows each entity's selected account and each entity's information includes cube view POV information, flow, IC, and user defined dimension type origin, along with a list of the comments. Information for each commentary includes the user who created the commentary and the time the commentary was made.

Workflow Commentary By Entity & Account
This is a list of all comments attached to the entities for the current workflow POV. This report is grouped by entity, then by account. Information for each commentary includes the user who created the commentary and the time the commentary was made.

Confirmation Group

Reports in the confirmation group show status information related to the data confirmation process controlled by the OneStream Data Quality engine.

See *Data Quality Engine* in the *Platform Engines*section of the *API Overview Guide* for more information about confirmation rules.

Confirmation Group Report Filters

There are no filters for this report group. Reports are based on the selected scenario and time period.

Confirmation Group Reports

Confirmation Check List
This report lists the confirmation profile assigned to each workflow with status for the current workflow POV and all workflow profile descendants.

Confirmation Status
This report shows the confirmation groups assigned to each workflow profile, with status for the current workflow and all descendants.

Confirmation Detail
This report shows the confirmation status history for the current workflow and all descendants.

Confirmation Rules Audit Group

The Confirmation Rules Audit reports show confirmation rule activities for added, updated, and deleted rules for a selected audit period.

Confirmation Rules Audit Group Report Filters

Confirmation Rule Group
Select a confirmation rule group from the list or select (All) to include all confirmation rule groups in the report.

See the *Finance Engine* in the *API Overview Guide*.

Confirmation Rule Name
All confirmation rules belonging to the specified rule group. If you specify (All) as the rule name, all confirmation rules for any rule group are included in the report. Click the drop-down list to include only a specific confirmation rule in the report.

Rule Text
Enter a text string to use as a match string to include confirmation rules whose formula contains that text.

User
The name of a specific user whose confirmation rule activity you want to see. Select a specific user from the drop-down or select (All) to include all users in the report.

Start Date and End Date
Enter a start and end date range to include only confirmation rules modified for the specified time range in the report.

Confirmation Rules Audit Group Reports

Confirmation Rules – Added
This report shows the confirmation rules added over a specified time range. Information for each rule includes the rule name, rule text, the user who added the rule, and the UTC time stamp showing when the rule was added.

Confirmation Rules – Updated
This report shows confirmation rules that were updated over a specified time range. Information for each rule includes the original and updated rule name, whether the rule text or rule formula has been updated, the name of the user, and the date and time the rule was last updated.

Confirmation Rules – Deleted
This report lists all the confirmation rules deleted over a specified time range. Information for each rule includes the rule name, rule text, the user who deleted the rule, and the UTC time stamp showing when the rule was deleted.

Cube View Audit Group

The Cube View Audit reports show cube view maintenance activities for updated, added, and deleted cube views for the specified audit period.

Cube View Audit Group Report Filters

Start Date and End Date

Enter a start and end date range to include only cube views for the specified range in the report.

CV Group Filter (Contains)

Enter a text string that matches a string in the name of one or more cube view groups you want in the report. For example, when entering process, it will include all cube view groups in the report with process in the group name, such as Process (Flash) and Process (Budget). Leave this field blank to include all cube views and cube view groups in the report.

Cube View (Cube Views Usage Report only)

Select the name of the cube to view usage data.

Cube View Audit Group Reports

Cube Views – Added

This report lists cube views (reports/forms) added over a specified time range. Information for each rule includes the user who added the cube view, the cube view name, the group it is in, and the UTC time stamp when the cube view was added.

Cube Views – Updated

This report lists cube views (reports/forms) updated over a specified time range. Information for each rule includes the user who last updated the cube view, the cube view name, the group it is in, and the UTC time stamp of the update action.

Cube Views – Deleted

This report lists cube views (reports/forms) deleted over a specified time range. Information for each rule includes the user who deleted the cube view, the cube view name, the group it is in, and the UTC time stamp when it was deleted.

Cube Views Usage

This report shows the usage of the selected cube, including the most recent run date and the total number of times it was run during the specified date range.

Dashboard Maintenance Audit Group

Dashboard maintenance units enable sharing of key dashboard artifacts like parameters, data adapters, common files, and components across multiple dashboard groups.

See *Platform Engine* in the *API Overview Guide*.

Use the reports in the Dashboard Maintenance Audit report group to see all activity related to dashboard maintenance units. This includes information about the creation of each dashboard maintenance unit and any record on dashboard maintenance units that were updated or deleted.

Dashboard Maintenance Audit Group Report Filters

Maintenance Unit
The name of a specific dashboard maintenance unit to show in the report. Select (All) to include all dashboard maintenance units in the report.

Maintenance Group
Select a defined maintenance group to show only maintenance activity for the selected group in the specified dashboard maintenance unit.

Start Date and End Date
Enter a start and end date range to include only dashboard maintenance records that were created, updated, or deleted during the specified time range.

Dashboard Maintenance Audit Group Reports

Dashboard Maintenance – Added
This report shows all activity for dashboard maintenance units added to OneStream during the specified time period. The total number of records in the report displays on the left side of the report header. Selected report filters display on the right side of the report header.

Dashboards with add activity in the specified date range display in alphabetical order by specified maintenance unit. Each add record also shows the name of the user who performed the add and the UTC time stamp of when the record was made.

Dashboard Maintenance – Updated

This report shows all activity for dashboard maintenance units updated to OneStream during the specified time period. The total number of records in the report displays on the left side of the report header. Specified report filters display on the right side of the report header.

Dashboards with update activity in the specified date range display in alphabetical order by specified maintenance unit. Each update record shows the dashboard group and the attribute being changed with the old and new values. Each update record showcases the name of the user who performed the update and the UTC time stamp of when the record was updated.

> **NOTE:** This report shows values that have been updated in the New Value column. Values that cannot be retrieved by the system display as (Unavailable Value) in those reports. Values that display as (Unassigned) have been set back to their default value.

Dashboard Maintenance – Deleted

This report shows all activity for dashboard maintenance units deleted in OneStream during the specified time period. The total number of records in the report displays on the left side of the report header. Specified report filters display on the right side of the report header.

Dashboards with delete activity in the specified date range display in alphabetical order by specified maintenance unit. Each delete record also shows the name of the user who performed the update and the UTC time stamp of when the record was updated.

Data Collection Group

Reports in the Data Collection group provide insight on data sources used to populate the data in your application. See*Data Sources*in the*Design and Reference Guide*.

Data Collection Group Report Filters

Change Type
You can specify one change type for sources changes you want to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all change types in the report.

Start and End Date
Select a start and end date range to include only the on the changes for the specified range.

Data Collection Group Reports

Data Source Change Audit
Reports changes made to data sources in your application. Use the Change Type, start, and end date parameters to view an updated report including the change type, name of the task, previous value, new value, user who made the change, and the time.

Data Entry Detail Group

The Data Entry report group contains a single report called the Data Entry Detail report.

Data Entry Detail Group Report Filters

There are no filters for this report group. The report shows all data entry detail for the current workflow scenario.

Data Entry Detail Group Reports

Data Entry Detail
Shows data manually entered by form. Records are sorted alphabetically by workflow profile, then by cube view.

Data Unit Comparison Group

The Data Unit Comparison report group has a single report called the Data Unit Comparison report.

Data Unit Comparison Report Group Filters

Cube
The cube contains data units to be compared.

Scenario
Select the scenario used for the comparison.

Variance Scenario
Select a scenario used as the variance for the comparison.

Time
The month and year to view records in the report.

View
Specify a numeric view member used for calculations to display data unit comparisons. Value is YTD, year-to-date, or Periodic.

Cons Member
Specify the consolidation member to compare data units.

Entity
The name of the entity to compare data units. Select an entity from the list or leave blank to include all entities within the selected workflow.

Suppress Matches
Determines if data units with Intercompany suppressed matches display in the report. Value shown is Yes or No.

Data Unit Comparison Group Reports

Data Unit Comparison
This report shows any variance between two scenarios for the specified entity.

Data Validation Group

Reports in the Data Validation group provide information for source and target account mappings in workflows.

Data Validation Group Report Filters

Dimension (Unmapped by Dimension Report only)
Select a dimension to see the unmapped areas within the dimension. This can be an entity, account, flow, or user-defined dimension.

Workflow Profile
The workflow profile within the current workflow to use for the report.

Data Validation Group Reports

Intersection Errors
Intersection errors indicate something is incorrect with an entire data intersection, such as a customer dimension mapped to a salary grade account. This report displays any intersection validation errors that exist within the current workflow and workflow time period.

See *OnePlace Workflow* in the *Design and Reference Guide*.

Unmapped By Dimension
Report shows unmapped areas within a dimension and workflow profile. It shows profile, time, entity, account, and the account description.

All Stage Source and Target Data
Report displays all the imported source data and the OneStream targeted account.

All Unmapped Dimensions
Report displays all the unmapped dimensions and shows the profile name, source and target time, entity, account, description, and to which dimension they are currently mapped to.

Entity Data Statistics Group

The Entity Data Statistics report group contains a single report called the Entity Data Statistics report.

Entity Data Statistics Group Report Filters

Entity
The name of the entity for which you want to view data statistics. Select an entity from the list.

Entity Data Statistics Group Reports

Entity Data Statistics
This report shows the total cells of data, input cells, journal cells, calc cells, no data cells, and zero data cells for every scenario in the specified entity. Data in the report is grouped by workflow profile and scenario within each year.

Entity Rights Audit Group

This report group contains a single report called the User Entity Rights by Cube report.

Entity Rights Audit Group Report Filters

User
The name of the user whose entity rights you want to include in the report. The value defaults to the user currently logged in. Select a user from the list.

Display Data, Read Data, Read and Write Data
Select **Yes** to show all read and read or write permissions for the specified user. Select from the following values:

- **Yes**: Display read and read or write permissions set to **Yes**.
- **No**: Display read, and read or write permissions set to **No**.
- **(Not Restricted)**: Display all permissions set for the specified user.

Entity Rights Audit Group Reports

User Entity Rights by Cube
This report shows security rights for a specific user for all entities, grouped by cube, then by entity name in alphabetical order. This report shows read access, read/write access, and cube data access permissions.

Entity Rights By User Group

This report group contains a single report called the User Entity Rights by Cube report.

Entity Rights by User Group Report Filters

Cube
The name of the cube for which you want to view user's entity rights.

Entity
The name of the entity for which you want to view entity rights. Select an entity from the list.

Display Data, Read Data, Read and Write Data
Select from the following values:

- **Yes**: Display read, and read/write permissions set to **Yes**.
- **No**: Display read, and read/write permissions set to **No**.
- **(Not Restricted)**: Display all permissions set for the specified user.

Entity Rights By User Group Reports

Entity Rights By User
This report lists security rights by user for a specified cube or entity. Displays read access, read or write access, and cube data access.

Form Group

The form group contains a single report called the Form Checklist.

Form Group Report Filters

There are no filters for this report group. Data in the report is based on the selected workflow profile, scenario, and time period.

Form Group Reports

Form Checklist
Shows all input forms in the currently selected workflow, scenario, and time period. Items in the report are sorted by form type, such as Optional or Required, then by form name.

Each form includes the form description, the form completion status with the associated cube view, comments, and audit information. The selected scenario and time period display on the side of the report header.

FX Rates Audit Group

Reports in the FX Rates Audit Group provide modification and status information related to currency exchange rates in OneStream.

See *Foreign Exchange Rates*in the *Design and Reference Guide*.

FX Rates Audit Group Report Filters

Rate Type
The name of a specific FX rate type. Select a specific rate type from the list or select **(All)** to include all types in the report.

Rate Period
Enter a monthly or yearly period, for example, 2023M11, to display only FX rate changes made in that period. Leave this blank to report on modifications made in all periods.

Status
The lock status of the FX rate modifications displayed in the report. Select **Locked**, **Unlocked**, or **(All)** to include all modifications regardless of lock status.

User
The name of a specific user whose FX rate modification activity you wish to view. Select a specific user from the drop-down or select **(All)** to include all users in the report.

Start Date and End Date (FX Rates Lock/Unlock Audit only)
Enter a start/end date range to include only FX rate information modified within the specified time range in the report.

FX Rate Audit Group Reports

FX Rate Lock/Unlock Audit
This report displays all FX rates that were locked or unlocked, the user, and the date and time modified.

FX Rate Current Status
This report displays the current status of the FX Rates for a specified time period.

Import Detail Group

Reports in the Import Detail group provide source and target mapping information for a specified workflow profile. This data is pulled from the transformation rules and imported stage data found on the specified workflow profile. Use these reports to understand the state of imported and derived data.

Import Detail Group Report Filters

Workflow Profile
The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow are displayed in the list.

Import Detail Group Reports

Import Detail (All Both Signs)
This report shows imported source data, imported and derived, with original (source) sign and sign after (target) mapping for the specified workflow import profile. The selected time period and scenario display in the report header.

Import detail displays in entity alphabetically for the specified workflow profile. For each entity in the workflow profile the account number, account description, currency type, and source and target amounts are displayed.

Import Detail (All Data)
Shows all source data, imported and derived, with source sign convention for the selected workflow import profile. The selected time period and scenario display in the report header.

For the specified workflow profile, each target entity and related target accounts are listed with their source accounts and source amounts. Each includes the account number, account description, and amounts.

Import Detail (Imported Data)
This report shows only the imported source data with source sign convention for the selected workflow import profile. The selected time period and scenario display in the report header.

For the specified workflow profile, each target entity and related target accounts are listed with account number, account description, and amounts.

Import Detail (Derived Data)
This report shows only the derived source data with source sign convention for the selected workflow import profile. The selected time period and scenario display in the report header.

For the specified workflow profile, each target entity and related target accounts are listed with account number, account description, and amounts.

Import Detail (Account Mapping) Group

The Import Detail (Account Mapping) group contains one report called Import Detail (Account Mapping).

Import Detail (Account Mapping) Group Report Filters

Workflow
The name of a workflow to view import mapping data. Select a workflow from the list.

Scenario
The scenario within the specified workflow to view account mappings.

Time
The month and year to view records in the report.

Import Detail (Account Mapping) Group Reports

Import Detail (Account Mapping)
This report shows the account mapping from import accounts to target accounts for the specified workflow, scenario, and time period. The selected workflow and time period display in the report header. For each OneStream account target, the report shows the source and target account mappings with the source and target account descriptions.

Import Detail (All Dims) Group

This report group provides insights into the state of stage data imported into OneStream by dimension, based on a specified workflow profile in the selected workflow. The scenario and time for the selected workflow profile are displayed in the report header.

Import Detail (All Dims) Group Report Filters

Workflow Profile
The name of a workflow profile in the current, active workflow. Only workflow profiles from the current workflow are displayed in the list.

Import Detail (All Dims) Group Reports

Import Detail (All Dims, All Data)
This report lists target imported and derived data and all dimensions, including user-defined dimensions, for the current workflow POV. Data displays alphabetically by workflow profile, then by target entity and account.

Import Detail (All Dims, Imported Data)
This report shows all target imported data and import detail for all dimensions for the current workflow POV. Source sign convention is included for all amounts. Data is grouped by workflow profile, then by target entity and target account. Each target entity also displays its source entity.

Import Detail (All Dims, Derived Data)
This report shows all derived data and import detail for all dimensions in the current workflow POV. Source sign convention is included for all amounts. Data is grouped by workflow profile, then by target entity and target account.

Import Detail (All Imports) Group

This report group displays the state of all data imported into OneStream. For each report, the scenario and time period for the current, active workflow profile display in the report header.

Import Detail (All Imports) Group Report Filters

There are no filters for this report group. Report data is based on import data from the current workflow POV.

Import Detail (All Imports) Group Reports

Import Detail (All Imports, All Data)
This report shows all imported source data, including bypassed mapped rows, for all workflow imports. For each target entity and target account, the report shows account number, account description, account amounts, and the associated workflow profile. Source sign convention is included for all amounts.

Import Detail (All Imports, All Dims, All Data)
This is a full report of all imported data for all dimensions and all workflow imports, including bypassed mapped rows. The report is grouped by workflow profile, target entity, and target account. Source sign convention is included for all amounts.

Import Detail (Source ID) Group

Reports in the Import Detail (Source ID) group provide several views into imported and derived data based on the source ID of the imported data.

Import Detail (Source ID) Group Report Filters

Workflow Profile

The name of a workflow profile in the current workflow POV. Only workflow profiles from the current workflow display in the list.

Import Detail (Source ID) Group Reports

Import Detail, SID (All Both Signs)

This report shows all imported source data with original sign and sign after mapping, source and target sign, for the specified workflow import profile. Report data is grouped by workflow profile, then by source ID, target entity, and target account.

Import detail for each workflow profile includes the source ID, account number and description, currency type for the account, and source and target amounts. Bypass values are noted.

Import Detail, SID (All)

This report shows all imported source data with sign convention for the specified workflow import profile. Imported source data is grouped by workflow profile, then by source ID, target entity, and target account within the workflow profile.

Import detail for each workflow profile includes the source ID, account number, and description. Bypass values are noted.

Import Detail, SID (Imported)

This report shows imported source data with sign convention for selected workflow import profiles. The report data is grouped by workflow profile, then by source ID, target entity, and target account within the workflow profile.

Import detail for each workflow profile includes the source ID, account number and description. Bypass values are noted.

Import Detail, SID (Derived)
This report is similar to Import Detail, SID (Imported) report, but for derived source data with sign convention for the selected workflow import profile. The report data is grouped by workflow profile, then by source ID, target entity, and target account within the workflow profile.

Derived detail for each workflow profile includes the source ID, account number and description. Bypass values are noted.

Import Detail (Source to Target) Group

The Import Detail (Source to Target) report group contains a single report called the Import Detail (Source to Target) report.

Import Detail (Source to Target) Report Group Filters

Workflow
The workflow name to view source to target mapping data. Select a workflow from the list.

Scenario
The scenario within the specified workflow to view source to target mappings.

Time
The month and year period for viewing records in the report.

Import Detail (Source to Target) Group Reports

Import Detail (Source to Target)
This report lists trial-balance type accounts and shows source accounts with corresponding target accounts and values. Filter criteria used for the report displays in the report header.

This report lists the source to target mappings and shows the source account and entity with the corresponding target account and entity with ledger descriptions and account amounts.

Import Trace Group

Reports in this group show imported and derived data traced back to the source account data. The scenario and time period for the selected workflow profile display in the report header.

Import Trace Group Report Filters

Account
The account number for viewing rule trace data.

Import Trace Group Reports

Trace (Target Account)
This report shows all imported and derived source data records mapped to the selected target account for descendants of the current workflow POV. Data is grouped by workflow profile, then by target account.

Each target account in the report shows the source entity, account number and description, the currency type if known, and amount in the account.

Trace (Target Account Rule)
This report lists transformation rules that map either imported or derived data to the selected account for descendants of the current workflow. Data in the report is sorted by workflow, with the specified account number displaying under the report header.

For each record, the report displays all rule trace information including rule group name, rule name, the rule expression and output, whether account data can be flipped from positive to negative, and any logical operator or logical expression.

Import Var (WF or Preserved) Group

Reports in this group reveal variances between data in the active workflow and preserved data. Data in these reports comes from transformation rules and imported stage data found in a specified workflow profile.

Import Variance (WF or Preserved) Group Report Filters

Workflow Profile
The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow display in the list.

Import Var (WF or Preserved) Group Reports

WF or Preserved Detail (All, Sign Flip)
This report compares preserved data and currently stored data, with mapped sign change, for the specified import workflow and current workflow time and scenario.

WF or Preserved Detail (All)
This report compares preserved data and currently stored data for the specified import workflow and current workflow time or scenario.

Import Var (WF or Prompt) Group

Reports in this report group look at the variances between preserved data and actual data in the current workflow. Data in the reports are grouped by workflow profile, then target entity and target account. Each record shows the entity and account within the entity, with the account description, currency types, updates, and the variance.

Import Variance (Workflow or Prompt) Group Report Filters

Workflow Profile
The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow display in the list.

Variance Scenario
Select a scenario you want to use as the variance for the comparison.

Time
The month and year for which you want to view records in the report.

Import Var (WF or Prompt) Group Reports

WF or Prompt Detail (All)
This report compares current workflow data and the specified workflow import data, the specified time, and the specified scenario.

WF or Prompt Detail, SID (All)
This report compares current workflow data and specified workflow import by Source ID, specified time, and specified scenario.

Intercompany Group

Reports in the Intercompany group show various slices of intercompany matching data available from OneStream cube views.

Intercompany Group Report Filters

Plug Account
Select the intercompany plug account used to handle any non-eliminating transactions.

Intercompany Group Reports

Intercompany Matching Checklist
This report shows the selected workflow's intercompany balances in the specified intercompany plug account. It displays the intercompany matching parameters at the top of the report, and lists each entity using the plug account at their current balances. The selected scenario and time period display on the right side of the report header.

See *Intercompany Matching Settings* in Workflow in the *Design and Reference Guide*. See *Intercompany Matching Settings*.

Intercompany Matching Detail
The Intercompany detail report contains the same data as the matching status report and includes comments for the selected plug account.

Intercompany Detail (Overrides) Group

Reports in the Intercompany Detail (Overrides) group focus on intercompany account matching detail from intercompany override plug accounts viewable in cube views.

Intercompany Detail (Overrides) Group Report Filters

Plug Account
Select the intercompany plug account used to handle any overrides.

View
Specify a numeric view member used for calculations to display intercompany overrides. Value is YTD, year-to-date, or Periodic.

Entity
The name of the entity for which you want to view intercompany details. Select an entity from the list.

Intercompany Detail (Overrides) Group Reports

Intercompany Detail (Overrides)
Provides intercompany override details for the specified plug account, view, or entity using the current workflow profile POV.

Intercompany Detail (All Plug Accounts)
Provides intercompany details for the specified view and all plug accounts using the current workflow profile POV. Plug account and entity selections are not applied to this report.

Intercompany Detail (All Periods In Workflow Year)
Provides intercompany details for the specified plug account and view, and all current workflow profile POV periods. Entity and view selections are not applied to this report.

Journal Group

Reports in the Journal group provide details on the status of journals in a specified workflow profile. Use these reports to see the progression and account detail of the currently selected workflow profile’s journals.

Journal Group Report Filters

Journal Status
Select a status for the journals to display in the report. Only journals currently in the selected status display in the report. Journal statuses are:

- Working
- Submitted
- Approved
- Rejected
- Posted

Entity Name (Starts With)
Specify only certain journals in specific entities to be included in the report by typing a common string for the specific entities. Use this filter with the account name feature to further filter the journal entries in the report.

Account Name (Starts With)
Specify only certain accounts in specific entities to be included in the report by typing a common string for the specific account numbers.

Journal Group Reports

Journal Checklist
Provides a checklist of journals for the current workflow POV. You can filter the report by journal status, entity name, and account name. All optional and required journal entries match the filtering criteria displayed in the report.

The report shows the current status and journal type for each journal. Each journal displays the dates for each journal status if that status has been achieved. Otherwise, the date is blank. For reference, the scenario and time period for the currently selected workflow display on the right side of the report header, along with the workflow name.

Journal Detail List
Provides details of all journals for the current workflow POV. You can filter the report by journal status, entity name, and account name. Journal information is detailed for each entity with the account listed, dimension data, account description, and debit and credit balances.

Journal Publishing Group

This report group contains a single report called Single Journal Detail.

Journal Publishing Group Report Filters

Journal Name (Starts With)
Specify a string to include only journal names matching the string in the report.

Journal Publishing Reports

Single Journal Detail
This report provides details for each journal in the current workflow POV. You can filter the report by journal name.

For each journal, the report shows the current status and the journal type. Each journal also shows the dates for each journal status if that status has been achieved. Otherwise, the date is blank. For reference, the scenario and time period for the currently selected workflow display on the right side of the report header, along with the workflow name.

Map Change Group

This group of reports provides general and audit information on transformation rule mappings from source systems to the OneStream financial model. Use these reports to see historical data on transformation mapping change activity for transformation rule profiles during a specified date range.

You can find transformation rules in OneStream under **Application** > **Data Collection** > **Transformation Rules**.

Map Change Group Report Filters

Transformation Rule Profile
The name of a specific transformation rule profile whose mapping information you want to include in the report. Select a transformation rule profile from the drop-down menu or select **(All)** to include all transformation rule profiles.

Change Type
Specify one change type whose mapping changes you want to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all change types in the report.

User
The name of a specific user whose transformation rule change activity you want to see. Select a user from the drop-down menu or select **(All)** to include all users in the report.

Start Date and End Date
Enter a start and end date range to include only map changes made within the specified time range in the report.

Map Change Group Reports

Transformation Rule Changes Audit
This report contains all mapping changes that have occurred in the system over a selected time frame for the specified transformation rule profiles. Data in the report is grouped by change type, then by rule group. Rule profile selection and all other report specifications are based on the current workflow. Each change shows the rule type and name, the rule expression, the name of the user, and the time the change was made.

Transformation Rule Changes History
This report shows all mapping changes that have occurred in the system over a specified time frame for a specified transformation rule profile. The report is grouped by rule group. Transformation rule profiles are based on the current workflow.

Map Change For User Group

The Map Change for User group contains a detailed audit report on transformation rule mapping changes made by a specific user, or by all your OneStream users.

See *Transformation Rules* in *Data Collection* in the *Design and Reference Guide.*

Map Change For User Group Report Filters

User

The name of a specific user whose transformation rule activity you want to see. Select a user from the drop-down menu or select **(All)** to include all users in the report.

Change Type

You can specify one change type whose mapping changes you want to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all change types in the report.

Start Date and End Date
Enter a start and end date range to include only map changes made within the specified time range in the report.

Map Change For User Group Reports

Transformation Rule Changes Audit For User
This report lists all map changes over a specified time range for a specified user. Each change shows the rule type and name with the rule expression, the name of the user, and the time the change was made. Changes are listed by change type. The filter criteria used in the report are displayed in the report header.

Map Transformation Listing Group

This group contains a single report that displays all the transformation rules defined in OneStream based on the specified map rule group.

Map Transformation Listing Group Report Filters

Map Rule Group
The name of the group containing the map rules listed in the report. Select a rule group from the drop-down menu or select **(All)** to include all transformation mapping rule groups in the report.

Map Transformation Listing Reports

Transformation Rule Listing
This report shows transformation rule details for all transformation rule groups or for a single specified group. Rule group information in the report is alphabetized by rule group name. Information for each rule group includes all rules for each group.

Each rule shows its rule description and expression and, when available, the rule output, logical operator, and any logical expression for the rule.

> **NOTE:** A blank rule description means a rule description is not entered for the rule in the transformation rule settings. NA indicates that the rule description does not apply to that rule.

Each rule in the report also includes a flip sign indicator (FS). If selected, the display value is flipped from positive to negative or negative to positive. This is typically done with expense numbers stored as positive or negative that need to be reversed on reports, such as a trial balance.

Metadata Analysis Group

Reports in this group provide information regarding the metadata and metadata members in OneStream.

Metadata Analysis Group Report Filters

There are no filters for this report group. Report data is based on cube dimension data in OneStream.

Metadata Analysis Group Reports

Orphaned Members

This report shows members that exist in a dimension not assigned to any dimension hierarchy based on data in the dimension library. Dimension types with orphaned members list the orphaned members alphabetically, along with the member description and member ID.

Parent Count For Members
This report shows a list of dimension members by member ID, member description, and number of parent members.

Cube Maintenance Dashboard (30 Days)
This report displays in graph format and does not have any filters.

The left pane shows the cube dimension assignment changes that occurred in the last 30 days. The top right pane shows the dimension member changes that occurred in the last 30 days. The bottom right pane displays the dimension node changes that occurred in the last 30 days, also known as the Custom dimensions. For example, UD1 and UD2.

Metadata Change Audit Group

Metadata Change Audit reports show different types of metadata additions, updates, and deletions made in OneStream dimensions over a specified date range.

Reports in this group display the criteria filtered on the right side of the report header.

Metadata Change Audit Group Report Filters

Change Type
Specify the types of metadata changes to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all metadata changes in the report.

Dimension
Report on a specific dimension by selecting it from the drop-down menu or select **(All)** to include all dimensions in the report.

Start Date and End Date
Enter a start and end date range to include only metadata changes made within the specified time range in the report.

Metadata Change Audit Group Reports

Member Changes Audit

This report shows changed dimension member metadata made over a specified time frame. Changes are listed by change type, then by dimension.

Each change shows the following:

- Dimension name
- Original name, if it is an updated change type
- Original member name, if it is an updated change type
- New member name
- New member description
- User
- Audit time

Member Formula Changes Audit

This report is similar to the Member Changes Audit report, but for formula metadata. This report shows changed member formulas over a specified time frame. Changes are listed by change type, then by dimension type.

Each change shows the following:

- Member name
- Member description
- User
- Audit time

- Original formula, if it is an updated change type
- New formula

The actual change made to the formula is displayed under each change.

Member Changes Detail Audit

This report details each change made to dimension members, including property changes, over a specified time frame. Changes are listed by dimension type, then by change type within the dimension.

Each change shows the following:

- Change type
- Member name
- Member description
- Dimension name
- User
- Audit time

Subsection property changes show the following:

- Change type
- Member name
- Property name
- Original property value, if it is an updated change type
- New property value
- User
- Audit time

Member Property Changes Audit

This report shows a detailed list of member property changes over a specified time frame. Changes are listed by dimension type, then by the time stamp when the change was made.

Each change shows the following:

- Change type
- Member name
- Original property value, if it is an updated change type
- New property value
- User
- Audit time

Metadata Changes During Task Execution

Metadata changes can occur when executing a task. This report shows metadata changes made during task processing within a specified time frame. Tasks are always shown, even if no metadata changes occurred during the specified time frame.

This report is similar in structure to the Member Changes Detail Audit report. Changes are listed by dimension, then by change type within the dimension.

Each change shows the following:

- Change type
- Member name
- Member description
- Dimension name
- User
- Audit time

Subsection property changes show the following:

- Change type
- Member name
- Property name
- Original property value, if it is an updated change type
- New property value
- User
- Audit time

Relationship Detail Audit

This report shows changed member relationships over a specified time frame. Changes are grouped by dimension type, then change type. Each change shows the following:

- Change
- Member name
- Parent name
- Dimension name
- Sort order
- User
- Audit time

Metadata Entity Property Change Audit Group

This report group consists of the Entity Relationship Property Audit report. Filter criteria for the report displays in the report header.

Metadata Entity Property Change Group Audit Report Filters

Change Type
Specify the types of metadata changes to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all metadata changes in the report.

Start Date and End Date
Enter a start and end date range to include only metadata entity property changes made within the specified time range in the report.

Metadata Entity Property Change Audit Group Reports

Entity Relationship Property Audit
This report lists all entity relationship property changes by user for a specified time range. Changes are sorted by dimension type. Data for each change includes the following:

- Change type
- Member name
- Member’s parent
- Property that changed

- Changed value
- User who made the change
- Time stamp of when the change was made

Data Cell Rights Group

Data slices protect the main data of a cube against changes. This protection affects input-ready queries and all planning functions that use a cube. Use a data slice containing these plan versions to ensure that certain plan versions cannot be changed after a certain period or that the current data is not overwritten.

The Data Cell Rights report group has a single report called Data Cell Rights.

Data Cell Rights Group Report Filters

User
The name of a specific user whose data access security rights you want to see. Select a specific user from the drop-down menu or select **(All)** to include all users in the report.

Data Cell Access
Determines the user records to show in the report.

- **Yes**: Display data rights on sliced cells where the user has data rights.
- **No**: Display data rights on sliced cells where the user does not have data rights.

Data Cell Rights Group Reports

Data Cell Rights
This report shows any slice level data security for a specified user. The report lists the selected user and shows slice cell data rights by workflow. This includes the data cell access security level, the member filter expression (if defined), and the order data rights are evaluated in.

See *Member Filters* in *Cube* in the *Design and Reference Guide*. .

Task Scheduler Group

Reports in the Task Scheduler group show information related to events in Task Scheduler.

Task Scheduler Audit Filters

Change Type
You can specify one change type whose mapping changes you want to include in the report. Select **Added**, **Updated**, or **Deleted**, or select **(All)** to include all change types in the report.

Start Date and End Date
Select a start and end date range to include only the business rules within the specified range.

Task Scheduler Reports

Task Scheduler Audit
This report shows changes made to Task Scheduler events. Use the parameters to view an updated report on the change type, name of the task, previous value, new value, user who made the change, and the time.

User Data Entry Detail Group

The User Data Entry Detail group contains a report detailing a single user's manual data entry activity. Use this report to inventory a specific user's manual data entry in a specific scenario during a specific time period.

User Data Entry Detail Group Report Filters

Scenario
The scenario in the specified workflow to view data entry details.

Time
The month and year for which you want data entry records.

User
The name of a specific user whose data entry activity you want to see. Select a user from the drop-down menu or select **(All)** to include all users in the report.

User Data Entry Detail Group Reports

Data Entry Audit (Single User)
This report shows all data manually entered into the system by the specified user for a scenario and time period. The report is grouped by workflow profile. The filter criteria for the report displays on the right side of the report header, including the specified user whose data entry activity is shown.

Each record shows the date and time of the change, the dimension information, including user-defined dimensions of the change, and the amount.

User Log Activity Group

This report group provides user activity for logons, tasks, and errors related to OneStream sessions. User log activity data is taken from activity in **System**> **Logging** in the platform.

Filter criteria used for the report displays in the report header for all reports.

User Log Activity Group Report Filters

Number of Days
Use the drop-down menu to select the number of days of user log activity you would like to view. The selection indicates the number of days prior to the current date. You can go as far back as 365 days to view log activity.

User

The name of a specific user whose log activity you want to see. Select a user from the drop-down menu or select **(All)** to include all users in the report.

User Log Activity Group Reports

User Logon Activity

This report shows user logon activity over the last specified number of days. All logon activity and logoff activity is included, whether done by the user or system. This includes all failed logons.

Each activity record shows the logon and logoff activity, application details, UTC activity time stamps, the primary application server, and the client IP where the activity occurred. The report header shows the total number of records in the report and the filter criteria.

User Task Activity

This report shows user task activity over the last number of specified days.

Each task record shows the task type and description, the task's completion percentage, UTC task activity time stamps, the primary application server, and the client IP where the task activity occurred. The report header shows the total number of records in the report and the filter criteria.

User Error Activity

This report shows user error activity over the last number of specified days.

Each error record shows the user who incurred the error, the time of the error, the application where the error occurred, and the error description. The application tier, server, and version are displayed for each record. The report header shows the total number of records in the report and the filter criteria.

Workflow and Entity Status Group

Reports in the Workflow and Entity Status report group provide insights into the completion status of specific workflow entities. Each report displays the filtering criteria in the report header.

Workflow and Entity Status Group Report Filters

Workflow
The name of a workflow for viewing workflow status. Select a workflow from the drop-down menu.

Scenario
The scenario within the specified workflow for viewing workflow status data.

Time
The month and year for viewing records in the report.

Completion Status
The workflow completion statuses to include in the report. Select **Complete**, **Incomplete**, **Has Errors**, or select **(All)** to include all statuses in the report. Incomplete statuses include Not Started and InProcess statuses.

Workflow and Entity Status Group Reports

Entity and Workflow Status
A summary report showing the workflow status for all entities in the specified top-level workflow. Entries in the report are grouped by entity. The calculation and workflow status display for each entity.

Workflow and Entity Status
A summary report that flips the data from the entity and workflow status report. It shows the workflow status for all entities in the specified top-level workflow, along with the calculation status of each entity. Entries in this report are grouped by workflow.

Entity and Workflow Status (With Data Status)
A summary report displaying the workflow status for all entities, with data status, in the specified top-level workflow. Entries in this report are grouped by entity. For each entity, data statuses indicate whether stage and cube data has been loaded, and whether Cube View or Microsoft Excel form data exists.

Workflow and Entity Status (With Data Status)
A summary report that shows the workflow status for all entities, with data status, in the specified top-level workflow. The report is grouped by workflow.

Workflow and Entity Status (Current WF) Group

Reports in the Workflow and Entity status (Current WF) report group provide various insights into the completion status of the currently active workflow. Each report displays the filtering criteria in the report header.

Entity & Workflow Status (Current Workflow) Group Report Filters

Completion Status
Specify the workflow completion statuses to include in the report. Select **Complete**, **Incomplete**, **Has Errors**, or select **(All)** to include all statuses in the report. Incomplete statuses include Not Started and InProcess statuses.

Workflow and Entity Status (Current WF) Group Reports

Entity & Workflow Status (Current Workflow)
A summary report showing the workflow status for all entities in the current workflow. This report is grouped by entity.

Workflow & Entity Status (Current Workflow)
A summary report displaying the workflow for all entities in the current workflow. The report is grouped by workflow.

Entity & Workflow Status (With Data Status)
A summary report displaying the workflow status for all entities, with data status, in the current workflow. This report is grouped by entity.

Workflow & Entity Status (With Data Status)
A summary report showing the workflow status for all entities, with data status, in the current workflow. The report is grouped by workflow.

Workflow Channel Audit Group

Use the reports in the Workflow Channel Audit report group to view all activity related to your workflow channels during a specific date range. This includes information on when each workflow channel was created and deleted and on data that has been updated for workflow channels.

Each report in this group displays the report's filtering criteria on the right side of the report header, and the total number of records displays in the report header.

Workflow Channel Audit Group Report Filters

Workflow Channel

The workflow channel for adding, deleting or updating an activity. Select a workflow channel from the drop-down menu or select **(All)** to see activity for all workflow channels.

User

A user for adding, deleting or updating an activity. Select a user from the drop-down menu or select **(All)** to see activity for all users.

Start Date and End Date

Enter a start and end date range to include only workflow channel changes made within the specified time range on the report.

Workflow Channel Audit Group Reports

Workflow Channel Audit – Added

This report displays workflow channels added within a specified time range. Filter the report to include all or a single workflow channel and user. The following information displays for each workflow channel in the report:

- Workflow channel name and description
- User who made the change
- UTC time stamp

Workflow Channel Audit – Updated

This report displays data updated in workflow channels within a specified time range. Filter the report to include all or a single workflow channel or user. The following information displays for each workflow channel in the report:

- Workflow channel name
- Original and new value of the changed property
- User who made the change
- UTC time stamp

Workflow Channel Audit – Deleted
This report displays data deleted from workflow channels within a specified time range. Filter the report to include all or a single workflow channel or user. The following information displays for each workflow channel in the report:

- Workflow channel name and description
- User who made the change
- UTC time stamp

Workflow Profile Audit Group

Use the reports in the workflow profile audit report group to understand all data activity related to your workflow profiles. This includes information on when each workflow profile was created and updated, and information on deleted workflow profiles.

Each report in this group displays the filtering criteria and the total number of records in the report header.

Workflow Profile Audit Group Report Filters

Workflow Profile
The name of a workflow profile.

Scenario Type
Select a scenario type from the drop-down menu.

User

A user for adding, deleting or updating an activity. Select a user from the drop-down menu or select **(All)** to see activity for all users.

Start Date and End Date
Enter a start and end date range to include only workflow profile rights changes made within the specified time range in the report.

Workflow Profile Audit Reports

The following information applies to the Workflow Profile Audit reports:

- The Workflow Profile Audit – Updated reports display values that have been updated in the New Value column. Values that cannot be retrieved by the system display as (Unavailable Value) in the report. Values displaying as (Unassigned) have been set back to their default value.
- For a (Default) scenario, setting a property back to its default value (Unassigned) creates an updated record for the Workflow Profile Audit – Updated report.
- First-time changes made to properties in any scenario other than (Default) display in the Workflow Profile Audit - Added report. Subsequent changes to the same properties display in the Workflow Profile Audit – Updated report.
- For any scenario other than (Default), setting a property back to its default value creates a record in the Workflow Profile Audit – Deleted report to indicate the previous value was deleted.

Workflow Profile Audit – Added
This report shows data added to workflow profiles within a specified time range. You can filter the report to include all or a single workflow profile, scenario type, and user. The following information displays each workflow profile in the report:

- Property that was changed
- Changed value

- User who made the change
- UTC time stamp of the change

Workflow Profile Audit – Updated

This report shows data updated in workflow profiles within a specified time range. Updates made to any scenario display in the Workflow Profile Audit - Updated report. Filter the report to include all or a single workflow profile, scenario type, and user. The following information displays each workflow profile in the report:

- Changed property
- Changed value
- User who made the change
- UTC time stamp of the change

> **NOTE:** Updating the Profile Active property that is not in the (Default) scenario from True to False creates a record viewable in the Workflow Profile Audit – Deleted report that indicates the True value was deleted. Changing this property from False back to True creates a record viewable in the Workflow Profile Audit – Added report.

Workflow Profile Audit – Deleted

This report shows data deleted from workflow profiles within a specified time range. Filter the report to include all or a single workflow profile, scenario type, and user. The following information displays each workflow profile in the report:

- Changed property
- Changed value
- User who made the change
- UTC time stamp of the change

Workflow Profile Rights Group

The Workflow Profile Rights group contains a single report called Workflow Profile Rights.

Workflow Profile Rights Group Report Filters

User
The name of the user whose workflow profile rights you want to include in the report. This defaults to the user for the current session. Select a defined user from the drop-down menu.

Execute Workflow, Certify Workflow, Process Journals, Approve Journals, Post Journals
These filters allow you to include and exclude records in the report based on whether the rights for the permission sets are set to Yes, No, or (Not Restricted). Use these filters to determine the profile rights permissions displayed in the report.

- **Yes**: Show only records in the report where the entity’s profile permission is Yes.
- **No**: Show only records in the report where the entity’s profile permission is No.
- **(Not Restricted)**: Show all permission records (**Yes** and **No**).
- **Execute Workflow**: Specified user has workflow execution permission for the workflow profile.
- **Certify Workflow**: Specified user has certification permission for the workflow profile.
- **Process Journals**: Specified user can process journals in the workflow profile.
- **Approve Journals**: Specified user can approve journals in the workflow profile.
- **Post Journals**: Specified user can post journals to the workflow profile.

Workflow Profile Rights Group Reports

Workflow Profile Rights
This report displays workflow permission rights for the specified user. For each cube, the report is sorted by workflow profile, then by profile property.

Workflow Profiles Rights By Type Group

A workflow profile is the basic building block of a workflow management structure. This includes a task list that users should perform for a group of entities. Common sets of task lists are known as workflow profile types. Reports in this group show user permission rights based on those workflow profile types.

Workflow Profile Rights By Type Group Report Filters

Workflow Profile Type
Select the workflow profile type to include permissions in the report.

See *Presentation* and *Using Workflow Profiles*in the *Design and Reference Guide*.

Scenario Type
Select a scenario type from the drop-down menu for which you want to view profile rights in the report.

Execute Workflow, Certify Workflow, Process Journals, Approve Journals, Post Journals
These filters allow you to include and exclude records in the report based on whether the rights for the permission sets are set to Yes, No, or (Not Restricted). Use these filters to determine the profile rights permissions displayed in the report.

- **Yes**: Show only records in the report where the entity's profile permission is **Yes**.
- **No**: Show only records in the report where the entity's profile permission is **No**.
- **(Not Restricted)**: Show all permission records (**Yes** and **No**).
- **Execute Workflow**: Specified user has workflow execution permission for the workflow profile.
- **Certify Workflow**: Specified user has certification permission for the workflow profile.
- **Process Journals**: Specified user can process journals in the workflow profile.
- **Approve Journals**: Specified user can approve journals in the workflow profile.
- **Post Journals**: Specified user can post journals to the workflow profile.

Workflow Profiles Rights By Type Group Reports

Workflow Profile Rights By Type

This report shows workflow rights for all users for the specified workflow profile type and scenario type within the workflow profile. The specified workflow profile type and scenario type display in the report header.

The report displays users with workflow rights and their permission rights for each workflow profile type. For each workflow, data is alphabetized by user ID.

Workflow Profile Rights Entities / No Admin

This report shows workflow rights for all non-administrator users for the specified workflow profile type and scenario type within the workflow profile. The specified workflow profile type and scenario type display on the right side of the report header.

The report displays users with workflow rights and their permission rights for each workflow profile type. For each workflow, data is alphabetized by user ID.

Workflow Profiles Rights by User Group

The Workflow Profiles Rights by User report group contain a single report called Workflow Profiles Rights by User.

Workflow Profile Rights by User Group Report Filters

Workflow Profile
The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow are displayed in the list.

Scenario Type
Select a scenario type from the list for which you want to view profile rights in the report.

Execute Workflow, Certify Workflow, Process Journals, Approve Journals, Post Journals
These filters allow you to include and exclude records in the report based on whether the rights for the permission sets are set to Yes, No, or (Not Restricted). Use these filters to determine the profile rights permissions displayed in the report.

- **Yes**: Show only records in the report where the entity’s profile permission is **Yes**.
- **No**: Show only records in the report where the entity’s profile permission is **No**.
- **(Not Restricted)**: Show all permission records (**Yes** and **No**).
- **Execute Workflow**: Specified user has workflow execution permission for the workflow profile.
- **Certify Workflow**: Specified user has certification permission for the workflow profile.
- **Process Journals**: Specified user can process journals in the workflow profile.
- **Approve Journals**: Specified user can approve journals in the workflow profile.
- **Post Journals**: Specified user can post journals to the workflow profile.

Workflow Profiles Rights by User Group Reports

Workflow Profile Rights By User

This report shows workflow rights for all users in the specified workflow profile. The report is grouped by workflow profile entity. Each workflow profile entity in the report lists the entity type and the cube it belongs to.

Each entity listed displays all users with workflow rights on each line, the user’s workflow profile rights for workflow execution, certification sign-off, and if they have journal processing, approval, and posting rights.

Workflow Status Group

Reports in the Workflow Status Group provide status information for a selected workflow and for various workflow profiles and entities belonging to a workflow.

Workflow Status Group Report Filters

Workflow

The name of a workflow to view workflow status. Select a workflow from the drop-down menu.

Scenario

The scenario within the specified workflow for viewing workflow status data.

Time

The month and year for which to view records in the report.

Completion Status

Specify the workflow completion statuses to include in the report. Select **Complete**, **Incomplete**, or **Has Errors**, or select **(All)** to include all statuses in the report. Incomplete statuses include Not Started and InProcess statuses.

Workflow Status Group Reports

Workflow Status

This audit report displays the completion status information for the workflow profiles and entities belonging to the specified top-level workflow.

Each shows the status of the last completed step in the process, the time of completion, and the percentage of completion of the workflow profile or entity. If the workflow profile or entity status is Not Started, the last completed time defaults to 1/1/1900 12:00:00 AM.

Import Channel Status

This report is similar to the workflow status report, but shows the completion status of all import channel workflows under the specified top-level workflow.

Form Channel Status

Shows the status of all form channel workflows for the specified top-level workflow.

Journal Channel Status

Shows the status of all journal channel workflows for the specified top-level workflow

Workflow Status (Current WF) Group

Reports in the Workflow Status (Current WF) group provide quick summaries of work progress done for the entities in the currently selected workflow.

Workflow Status (Current Workflow) Group Report Filters

There are no filters for this report group. Report data is for the currently selected workflow.

All reports in this report group show the currently selected scenario and time period for the currently selected workflow in the report header.

Workflow Status (Current WF) Group Reports

Workflow Status (Current Workflow)
This report displays completion status of all workflow profiles under the current workflow. For each workflow profile listed, the report shows the profile's completion status, the last step executed in the workflow profile, the time that step was executed, and the completion percentage.

Import Channel Status (Current Workflow)
This report shows the status of the child import channel workflow profiles for the currently selected workflow. Each import channel listed displays the completion status, the last step executed in the import channel, the time that step was executed, and the completion percentage.

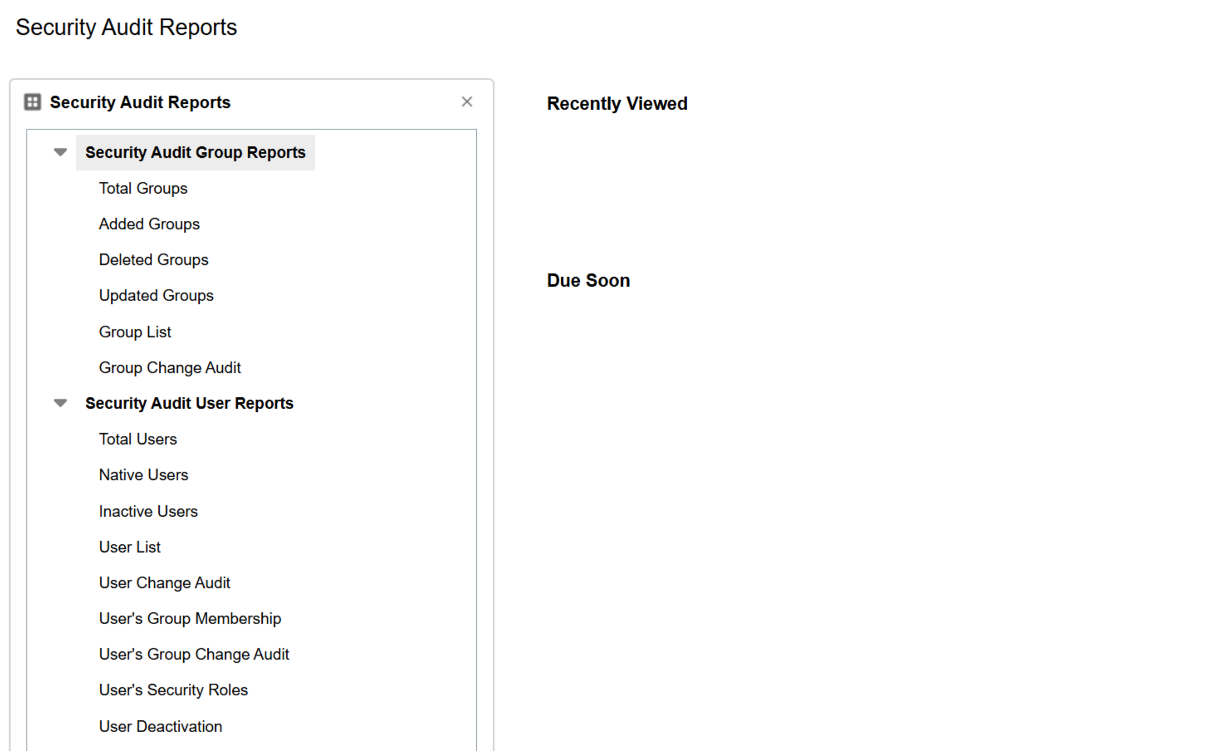
See *Workflow Channels* in the *Design and Reference Guide*.

Form Channel Status (Current Workflow)
This report shows the status of all form channel workflow profiles for the current workflow. Each form channel listed displays the completion status, the last step executed in the form channel, the time that step was executed, and the completion percentage.

Journal Channel Status (Current Workflow)
This report shows the status of all journals for the current workflow. Each journal listed displays the completion status, the last step executed in the journal, the time that step was executed, and the completion percentage.

Security Audit Reports

Security Audit Reports include information about the users and groups for internal security audit purposes. The dashboard enables you to view and run all security reports in OneStream. From the dashboard you can print, view, or export any of the reports.



Report Filters

Group Reports Filters

All Group Reports, except the Group List and Total Groups reports, use the following filters:

Start Date and End Date
Enter a start and end date range to include only records during the specified time range.

The Group List report has the following filters:

Name
Enter the name of the Group List.

Description
Enter a description of the group.

The Total Groups report does not use any filters.

User Reports Filters

The Total Users, Native Users, User List, and User Deactivation reports do not use filters.

> **NOTE:** The User List report can only be viewed in Grid View.

Inactive User Report

The Inactive User report has the following filters:

Inactive Since
Choose a date to view a list of users that have been inactive since the chosen date.

Enabled
Select **True** to view which of the inactive users are enabled in your application or select **False** to view those who are not enabled. Select **Both** to view inactive and deactivated users.

User Change Audit Report

The User Change Audit report uses this filter:

Start Date and End Date

Enter a start and end date range to include only records during the specified time range.

User's Group Membership Report

The User's Group Membership report uses the following filters:

Name

Enter the name of the Group.

Description

Enter a description of the group.

Enabled

Select **True** to view enabled groups or **False** to view inactive groups.

Text 1-4

Use this field to search for Custom Text.

User's Group Change Audit Report

The User's Group Change Audit and User's Security Roles reports uses these filters:

Change Type

You can specify one change type whose mapping changes you want to include in the report.

Select **Added**, **Deleted**, or select **(All)** to include all change types in the report.

Start Date and End Date

Enter a start and end date range to include only records during the specified time range.

Report Types

Security Audit Report includes Group and User reports. See View and Run Reports to learn how to generate any of these reports.

Group Reports

Group details are displayed in the following reports:

- **Total Groups**: Number of user groups in the application. Groups individuals are in and can be added to.
- **Added Groups**: Any groups added in the specified date range.
- **Deleted Groups**: Any groups deleted in the specified date range.
- **Updated Groups**: Any groups that were changed or modified in the specified date range.
- **Group List**: Complete list of all user groups in the application.
- **Group Change Audit**: Shows any changes made to the user groups within your application.

User Reports

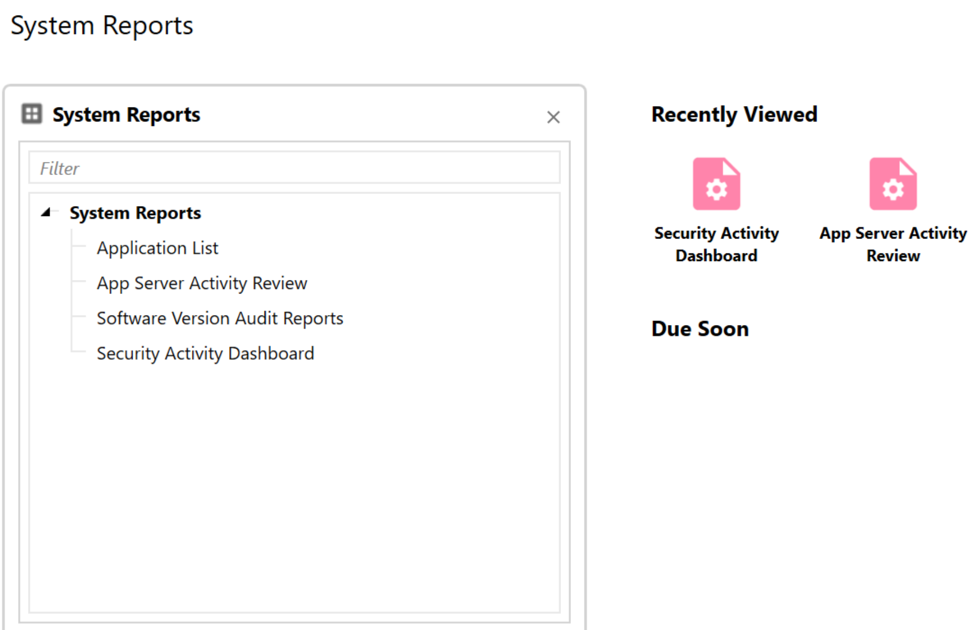
User details are displayed in the following reports:

- **Total Users**: Displays the count and list of all users in the application.
- **Native Users**: Displays a complete list of native users in the application.
- **Inactive Users**: Displays a complete list of users with no activity after the selected date.
- **User List**: Displays a complete list of users shown in a grid.

- **User Change Audit**: Displays changes made to an individual user during the specified date range.
- **User’s Group Membership**: Shows which groups the individuals are a member of.
- **User’s Group Change Audit**: Select the Change Type and the Start and End Dates to see if an user's group was changed during the specified time.
- **User’s Security Roles**: Shows a user's security roles.
- **User Deactivation**: Shows enabled users that are set to expire based on the Last Logon Time and Logon Inactivity Threshold Setting.

System Reports

System Reports include information about the system such as the server, application, and security. The System Reports dashboard enables you to view and run all system reports in OneStream. From the dashboard you can print, view, or export any of the reports.



Report Types

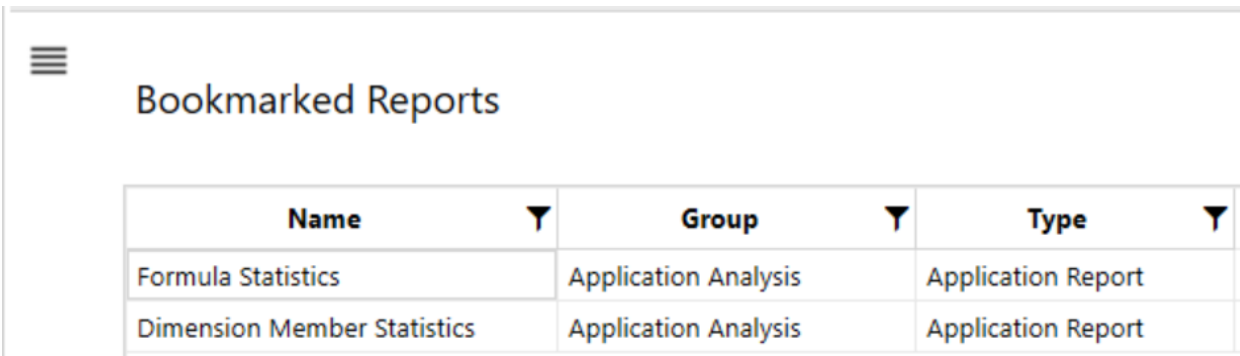
The following System Reports are available to run:

- **Application List**: List of applications in the platform.
- **App Server Activity Review**: Use the **Processing Days** filter to view activity on application servers for the specified time.
- **Software Version Audit Reports**: Use the **Processing Days** filter to view a history of the software versions you've had installed during the specified time.
- **Security Activity Dashboard**: Displays log on activity and user maintenance activity for last 30 days.

See View and Run Reports to learn how to generate any of these reports.

Bookmarked Reports

Bookmarked Reports enable you to quickly navigate to and view the reports you use most often. Click **Bookmarked Reports** to navigate to the dashboard.



The dashboard displays all of your Bookmarked Reports in a grid with the following information:

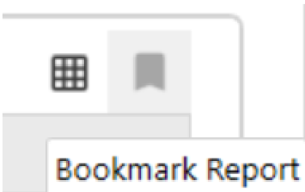
- **Name**: Report name
- **Group**: Name of the group in which the report lives
- **Type**: The type of report

Sort the grid using the parameter icons, or export the grid by right-clicking and selecting Export.

Apply Bookmarks

Use these steps to add a bookmark to any report:

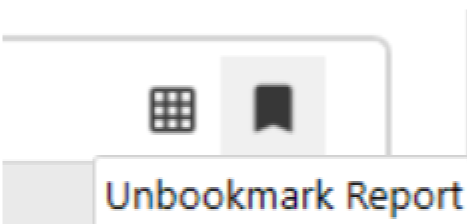
1. Select any report from Application Reports, System Reports, or Security Audit Reports.
2. Click the Bookmark icon to save the report to the Bookmarked Reports dashboard.



Remove Bookmarks

If you don't need quick access to a report anymore, remove the bookmark using these steps:

1. Locate the report from which the bookmark should be removed.
2. Click the Bookmark icon to remove the report from the Bookmarked Reports dashboard.



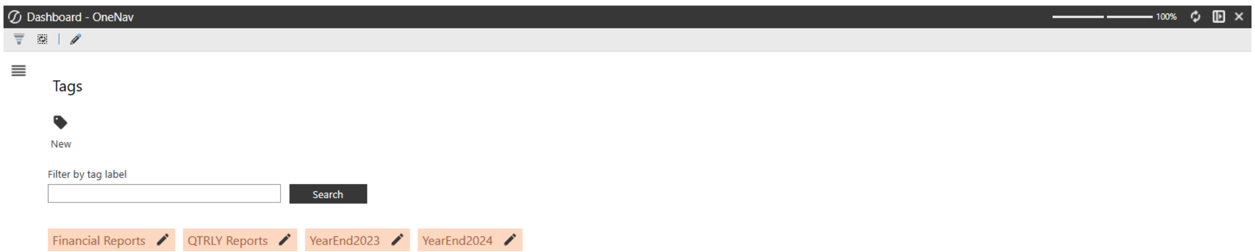
View Bookmarked Reports

Select any report from the list to view the report using Report Viewer. See View and Run Reports.

Use the breadcrumbs to navigate back to the report or the Bookmarked Reports dashboard.

Tags

Use tags to quickly locate and group common reports. Click the Tags icon to navigate to the Tags dashboard. The dashboard displays all created tags in alphabetical order.



Apply Tags

Add a tag to any report you want to either access quickly later or categorize with other reports. To apply a tag, follow these steps:

1. Select any report from Application Reports, System Reports, or Security Audit Reports.
2. Click the Tag icon below the report title.
3. Search and select a tag from the drop-down menu.

When the chosen tag is clicked from the Tags dashboard, the report will display in the report list.

Remove Tags

If a tag no longer applies to a report, you can remove it using these steps:

1. Locate the report from which the tag should be removed.
2. Click the **X** next to the tag.
3. In the **Remove Tag** dialog box, click the **Confirm** button to remove the tag from the report.

The tag is removed and the report is no longer associated with the tag.

View Reports with Tags

Click any tag to navigate to a list view of all reports associated with the chosen tag. The following information will display in the grid:

- **Name**: Report name
- **Group**: Name of the group in which the report lives
- **Type**: The type of report
- **Due Date**: The Report's due date

Select any report from the list to view the report using Report Viewer. See View and Run Reports.

Manage Tags

Administrators and Tag Managers, those designated in Security Management, can create and manage tags for Navigation Centerusers.

Create Tags

You can create new tags directly from reports or from the Tags dashboard.

Reports

Create a new tag from any report following these steps:

1. Select any report from Application Reports, System Reports, or Security Audit Reports.
2. Click the Tag icon below the report title.
3. Select **New Tag** from the drop-down menu.
4. In the **New Tag** dialog box, enter a tag name in the **Tag Label** field.

   > **NOTE:** The character limit for each tag is 50. Special characters, spaces, numbers, and capital letters are allowed. Duplicate tag names cannot be used.

5. Click the **Save** button.

Tags Dashboard

Follow these steps to create a new tag from the Tags dashboard:

1. Click the **Tags** icon.
2. Click the **New** icon.
3. In the **New Tag** dialog box, enter a tag name in the **Tag Label** field.

   > **NOTE:** The character limit for each tag is 50. Special characters, spaces, numbers, and capital letters are allowed. Duplicate tag names cannot be used.

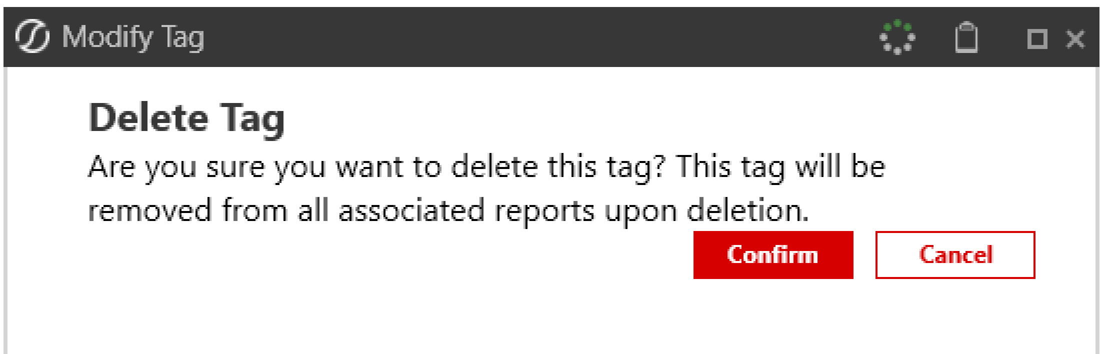
4. Click the **Save** button.

Edit Tags

1. From the Tags Dashboard, click the **pencil**icon next to a tag.
2. In the **Modify Tag** dialog box, edit the text in the **Tag Label** field.
3. Click **Save** to accept the changes.

Delete Tags

1. From the Tags Dashboard, click the **pencil** icon next to a tag.
2. In the **Modify Tag** dialog box, edit the text in the **Tag Label** field.
3. Click the **Delete** icon.
4. In the **Delete Tag** dialog box, click **Confirm** to delete the tag or click **Cancel** to remain on the Modify Tag dialog box.



CAUTION: Tags are deleted from the dashboard and the tag is removed from all reports associated with it.

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: `ONC_PV8.5.0_SV103_PackageContents.zip`

Identifier	Description
ONC	Solution ID
PV8.5.0	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*.

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.