onestream

Parcel Service Guide

PV8.0.0 SV100

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Overview

Parcel Service is a OneStream Solution and part of the extensible document framework. Parcel Service provides book and document distribution capabilities, enabling you to create document packages or package groups to deliver,by email or using a fileshare, given predefined distribution settings. You can ship these packages and package groups from the solution home page or on a scheduled basis using the OneStream Task Scheduler. See *Task Scheduler* in the *Design and Reference Guide*.

Setup and Installation

The following sections contain important information about planning, installing and configuring the solution. Before you install Parcel Service, review these sections:

- Dependencies
- Select the Development Location
- Create the Development Application
- Configure the Application Server
- Install Parcel Service

Dependencies

Note these dependencies:

Component	Description
OneStream 8.0.0 or later	Minimum OneStream Platform version required to install this version of OPS.
OneStream App for Windows	OPSis optimized for the OneStream Application for Windows which has all the functionality as the browser-based version of OneStream.

Component	Description
Microsoft SQL Server 2012 or later	OPS requires an instance of Microsoft SQL Server 2012 or later.

Select the OPS Development Location

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

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

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

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

Create the OneStream Development Application

1. Ensure that all the artifacts relating to Parcel Service, such as **Workflow Profiles** and **Entities**, are in the Production application.
2. Copy your Production OneStream application to your Development environment and rename it. Use this Development version for your OPS project.

Configure Application Server Settings

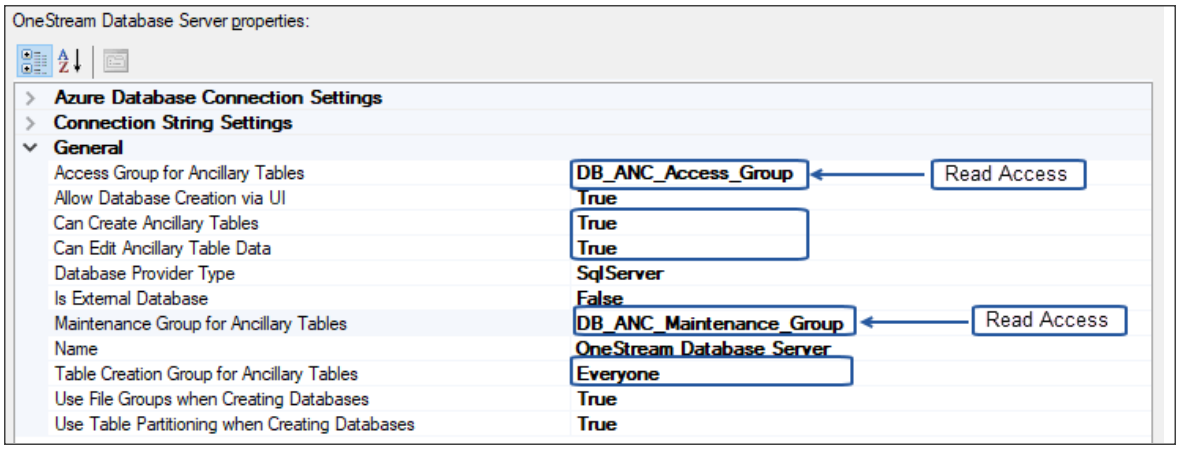
You may need to edit the OneStream Application Server Configuration so users can create and change data in the additional database tables. If other OneStream Solutions (such as Specialty Planning) are already in the application, these adjustments may already exist.

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**:
4. **Access Group for Ancillary Tables**: Select a group that includes those who will access records.

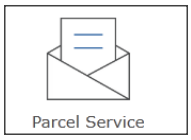
- **Can Create Ancillary Tables**: True
- **Can Edit Ancillary Table Data**: True
- **Maintenance Group for Ancillary Tables**: Select a group to edit and maintain tables.
- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.



4. Restart Internet Information Server.

Install OPS

1. On the OneStream Solution Exchange, go to OneStream Solutions and select the **Parcel Service** tile.

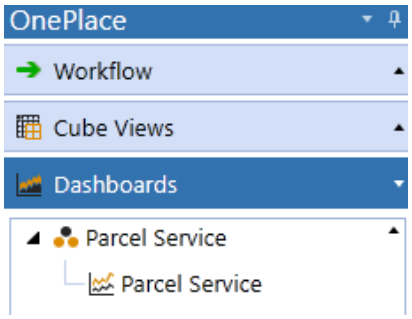


2. On the Parcel Service solution page, select the appropriate OneStream platform version from **Minimum Platform Version** .
3. Select the most recent version from **Solution Version** and then click **Download**.
4. Log in to OneStream.
5. Click **Application** > **Tools** > **Load/Extract**.
6. On 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**.

Set Up Parcel Service

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

In OneStream, click **OnePlace** > **Dashboards** > **Parcel Service** > **Parcel Service**.

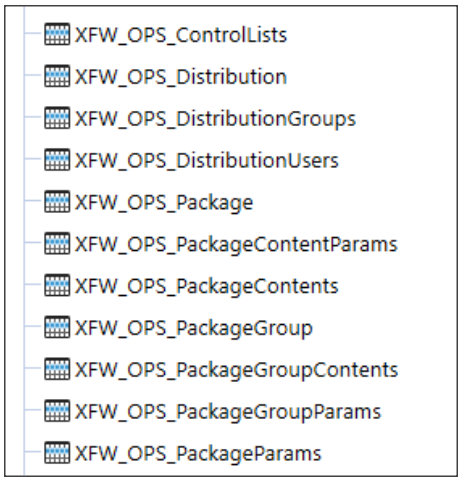


Create Tables

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

   This step may be necessary when upgrading even if tables are already present.

OPS will not drop any tables that already exist, but will modify table structures and add any new ones if necessary.



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

Package Contents

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

The following business rules are included:

OPS_HelperQueries

This is a dashboard dataset business rule that provides functions for data query operations from dashboard components and data adapter components.

OPS_SolutionHelper

This is a dashboard extender business rule that provides various helper functions for the OPS solution. These helper functions include management of the solution setup, configuration settings, and management.

OPS_ParamHelper

This is a conditional parameter helper functions XFBR string business rule. This rule provides conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

OPS_ShipPackageUsingID

This is an extensibility business rule used to execute the OPS package shipping routine as a background data management job where the package is referenced by ID.

OPS_ShipPackageGroupUsingID

This is an extensibility business rule used to execute the OPS group package shipping routine as a background data management job where the group package is referenced by ID.

OPS_ShipPackageUsingName

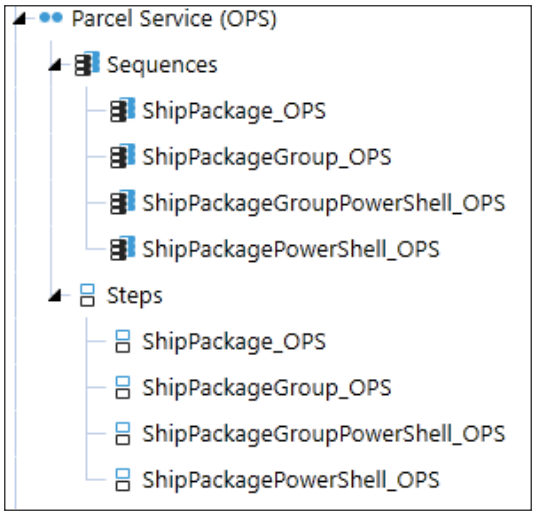
This is an extensibility business rule used to execute the OPS package shipping routine as a background data management job where the package is referenced by name.

OPS_ShipPackageGroupUsingName

This is an extensibility business rule used to execute the OPS group package shipping routine as a background data management job where the package is referenced by name.

Data Management

The data management sequences and steps shown in the following image are used with their related business rules, as described above. Run these processes in the background as data management sequences while you continue to work.



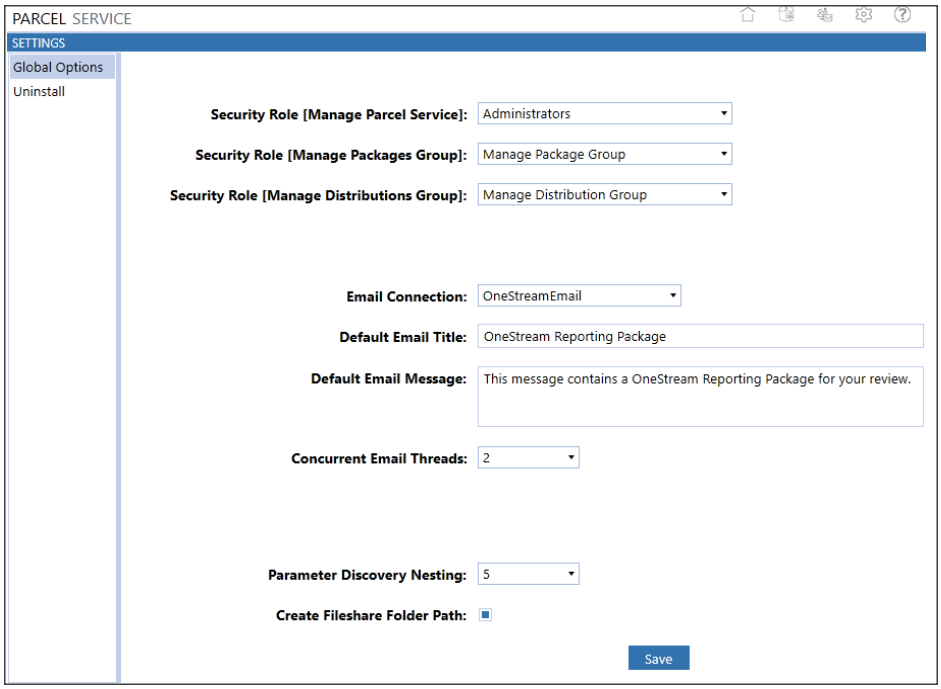
Specify Settings

The **Settings** page contains the **Global Options** tab in where you define key properties that guide administration. The page also contains the **Uninstall** tab that provides uninstall options.

Specify Global Options

The Global Options page contains key properties that define global OPS administration, initial setup, and configuration.

> **NOTE:** All Global Option settings are retained during an upgrade.



Security Role [Manage OPS]

Anyone with this role is considered a FX admin and can configure any aspect of the OPSsolution. By default, only the OneStream Administrator or someone in the Administrators user group can change these settings.

Security Role [Manage Packages Group]

Members of this access group can access, copy, create, modify, and ship Public packages and package groups.

Security Role [Manage Distributions Group]

Members of this access group can access, copy, create, and modify Public distribution lists.

Email Connection

Select an **email connection** from the drop-down menu. Email connections are configured in the OneStream Application Server configuration. Email connections contain all the necessary setup information for the local email provider, including the sending email address, server credentials, host, port, and other data. The email connections list is pulled from the **Database Server Connections** list in the Application Server configuration.

For more details on email database connections, see the *OneStream Installation and Configuration Guide*.

> **NOTE:** See also Appendix 1 at the end of this guide for information on setting up OneStream encrypted email connections.

Default Email Title

The email title included in all distributions if a title is not assigned to the distribution.

Default Email Message

The email message included in all distributions if a message is not assigned to the distribution.

Concurrent Email Threads

The maximum number of email threads to run concurrently. This number is set by a OneStream Admin or an OPSmanager, and depends on the capabilities of your email provider. The default is two.

Parameter Discovery Nesting

This controls how many times the **Parameter Discovery** process loops through extensible document content looking for parameters.

Create Fileshare Folder Path

This setting allows OPS to create folders if a folder does not exist upon saving when specified in the **FileShare Folder Path** field.

> **NOTE:** Substitution variables can also be used to define file paths.

Test Mode (True/False)

Test mode allows users to test package delivery without the package being sent to the distribution list. If set to **True**, the package is run and logged in the Error Log rather than sending an email.

> **NOTE:** If users have access to maintain packages and distribution lists, they must be included in the access group for **Ancillary Tables** (application server setup screen).

Uninstall

You can uninstall the user interface or the entire solution. If part of an upgrade, changes to standard OPS objects are removed.

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

There are two uninstall options:

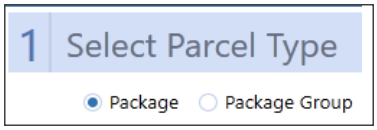
1. **Uninstall UI** removes OPS, including related dashboards and business rules but leaves the database and related tables in place. For some releases, this step should be performed before accepting any new version of OPS because some of the dashboards or other objects may have been modified.
    - Choose this option to accept a OPS update without removing the data tables.
    - The OPS Release Notes indicate if an overinstall is supported.
2. **Uninstall Full** removes all the related data tables, all data, OPS dashboards, and business rules. Choose this option to completely remove OPS or to perform an upgrade that is so significant in its changes to the data tables that this method is required. Only business rules deployed on OPS during setup and installation are removed.

Ship Items on the Home Page

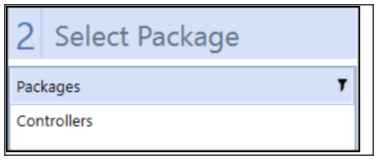
Use the **Parcel Service** home page to ship packages. You can ship private or public packages or package groups.

Perform these steps to ship an item:

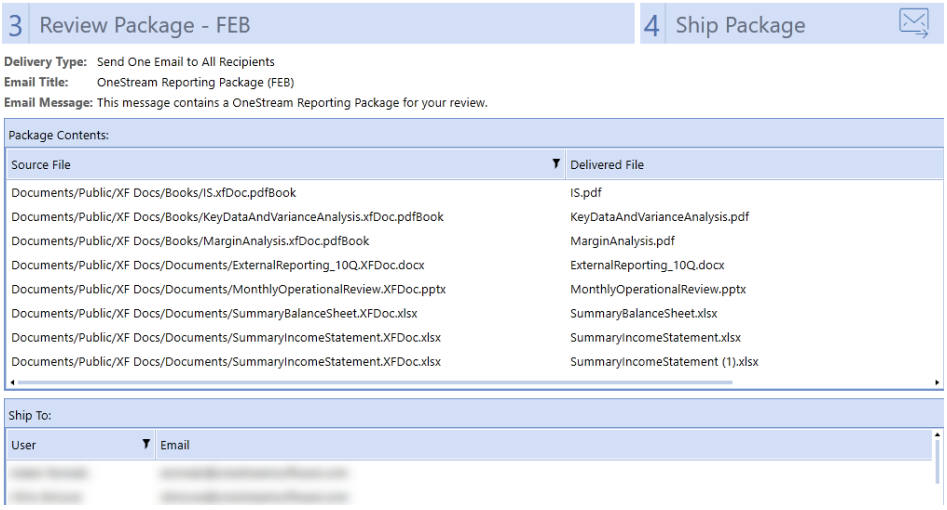
1. Select the **parcel type**.



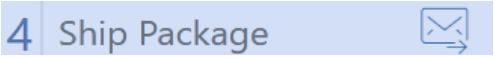
2. Select the **package** or **package group**.



3. Review the package contents.



4. Ship the package or package group.

   Shipment starts as a background process you can monitor using the **Task Activity** log.

Packages

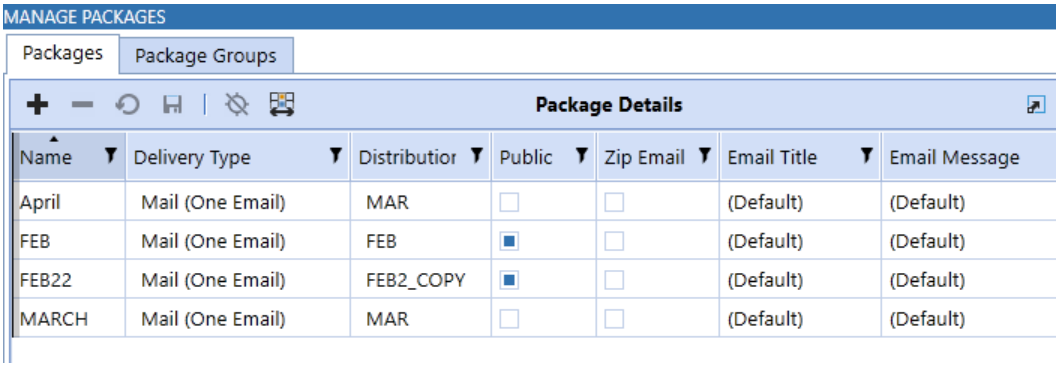
A package or package group is a list of associated extensible documents or extensible document books. You can assign a distribution list to each package that identifies to whom the package will be shipped to. Users with permission to manage packages and package groups can create packages or groups and specify parameters for package details and contents. Packages or package groups can be copied or shipped from the **Manage Packages** page.

See:

- Create a Package
- Package Contents
- Supplied Parameters - Package Level
- Supplied Parameters – Content Level
- Use Discover

Create a Package

To create a package, click to add a row in the **Package Details** grid.



Delivery Type

- **Mail (One Email)**: Sends the files in the package to all members in the assigned distribution list. The recipients receive a group email.

  > **NOTE:** All recipients are listed in the **To** field.

- **Mail (Individual Emails)**: Sends the files in the package to all members in the assigned distribution list. Each recipient receives an individual email resulting in only one recipient listed in the **To** field.
- **Copy Fileshare (Notification Email)**: Copies the files in the package to the file share, and sends an email to all recipients in the distribution list.
- **Copy Fileshare (No Email)**: Copies the files in the package to the file share without sending a notification.

Distribution: Name of the distribution list defining the recipients of the selected package. **Public (True/False)**: Controls the availability of the package.

- If selected, the package is available to all users on the OPS home page and can be managed by users assigned to the Manage Packages Group security role. If cleared, the package is only available to the user who created the package and the OneStream or OPS Administrators.

Zip Email (True/False): When selected, this delivers the package contents in a .zip file.

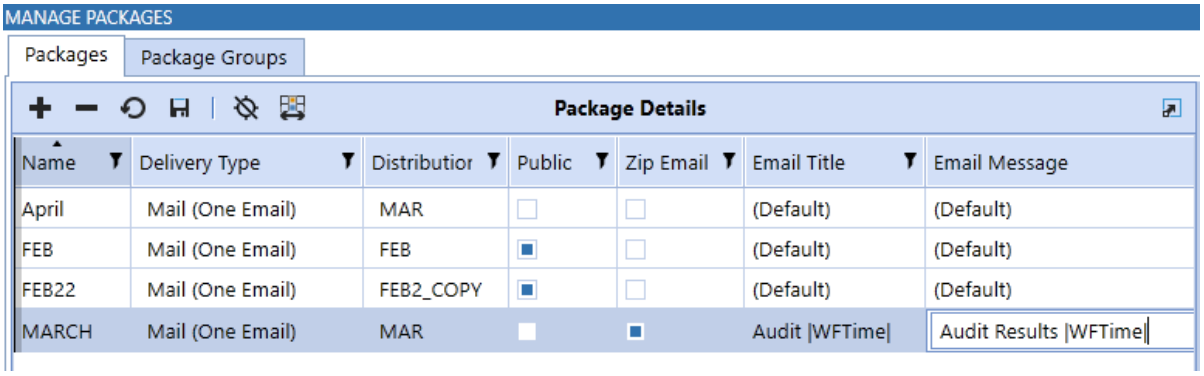
> **NOTE:** Zip email is ignored when the Delivery Type is set to either **Copy to FileShare (Notification Email)** or **Copy to FileShare (No Email)**.

Email Title: Defines a unique email title in place of the default email title from the Settings page. Use parameters in the **Email Title** field to provide conditional parameter processing.

> **Example:** Audit |WFTime|

Email Message: Defines a unique email message in place of the default email message from the Settings page. Use parameters in the Email Message field to provide conditional parameter processing.

> **Example:** Audit > WFTime|



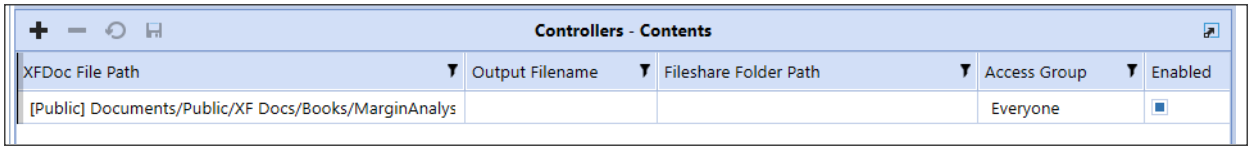
Name	Delivery Type	Distributior	Public	Zip Email	Email Title	Email Message
April	Mail (One Email)	MAR	☐	☐	(Default)	(Default)
FEB	Mail (One Email)	FEB	■	☐	(Default)	(Default)
FEB22	Mail (One Email)	FEB2_COPY	■	☐	(Default)	(Default)
MARCH	Mail (One Email)	MAR	☐	■	Audit |WFTime|	Audit Results |WFTime|

Created By: The user who created the package. This column is only displayed for OneStream and OPS Administrators.

Date Created: Date and time the package was created. This column is only displayed for OneStream and OPS Administrators.

Package Contents

The **Contents** section lists the extensible documents and books included in the package.



- **XFDoc File Path** (Required): Displays the file path where the extensible document files are stored.
- **Output Filename**: Enter a Filename to be assigned to the package content file. A file extension is not needed because the file inherits the extension from the extensible document file path. If left blank the original Filename is used.
- **Fileshare Folder Path**: Network file path location where the package content file needs to be saved.

> **NOTE:** This is only required for **Copy Fileshare** delivery types.

- **Access Group**: Filters the package contents and ships it based on the selected access group. If the user sending the package is not in the specified access group for one of the package's content items, then that item will not be included in the package.
- **Enabled (True/False)**: Controls whether a content item is enabled within the package. Select to include the Extensible Document in the package. Clear to exclude it from the package.

Supplied Parameters - Package Level

Each extensible document may have parameters that prompt you when you run a file. When you run a OPS package, there is no prompt, so you must specify parameters beforehand. Package parameters apply to an entire package. To apply a specific parameter setting to a package, select the **parameter** and enter a **literal value**. This literal value applies to all files in the package. This type of parameter does not have to be used, but it is available for convenience and reduces parameter maintenance.

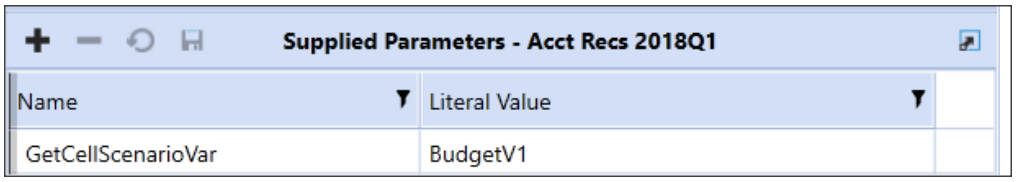
- **Name**: Select a Parameter name from the drop-down list.

  > **NOTE:** This list contains all dashboard parameters in the current application.

- **Literal Value**: Enter the literal value to use for the named parameter.

Supplied Parameters – Content Level

Each extensible document may have parameters that would normally prompt you when you run the file. When running a OPS package, there is no prompt, so specify parameters beforehand. Content parameters are required and used in the selected extensible document content file. This list of parameters defines the values that must be provided to the content file for the file to be executed without user input. Add these values manually or automatically determine the values by clicking **Discover**.



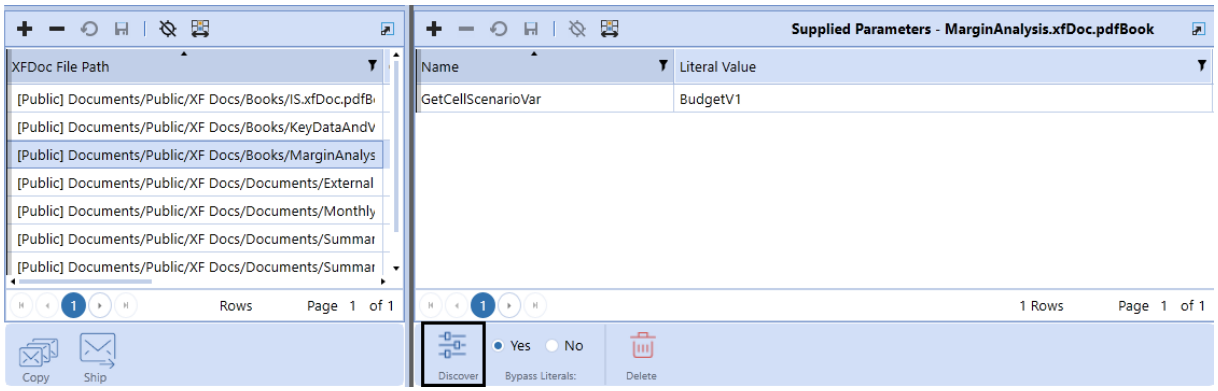
- **Name**: Enter the name of the parameter.
- **Literal Value**: Literal value to use for the named parameter.

> **NOTE:** Literal value definitions cannot contain pipes and exclamation marks because they cause unsupported user prompts during the shipping process. Literal values can contain a |substitution variable| (pipes) definition because these values are defined without prompting users.

Use Discover

Discover: Select a package's content file and click **Discover** to find any parameters requiring a default value. These parameters display in the supplied parameters grid so users can assign a literal value.

> **NOTE:** Parameter discovery uses a recursive algorithm to discover nested parameters (parameters in parameters). By default, this is performed ten times, but you can change this by modifying the **Parameter Discovery Nesting** option in the Setup page.



Bypass Literal (Yes/No): Select to bypass all literal parameters when using the **Discover** feature.

> **NOTE:** All changes made to parameter values during the shipping process do not change the actual value of the Dashboard parameter or the original extensible document or book.

Package Groups

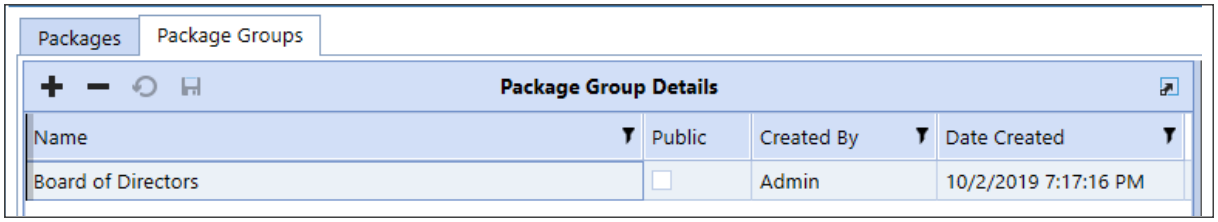
A package group contains packages. Use the Package Group page to:

- Create a package group and add package.
- Copy package groups.
- Distribute packages.

See Create a Package Group Definition and Manage Distribution Lists

Create a Package Group Definition

To create a package group, click ✚ to add a row in the **Package Group Details** grid.

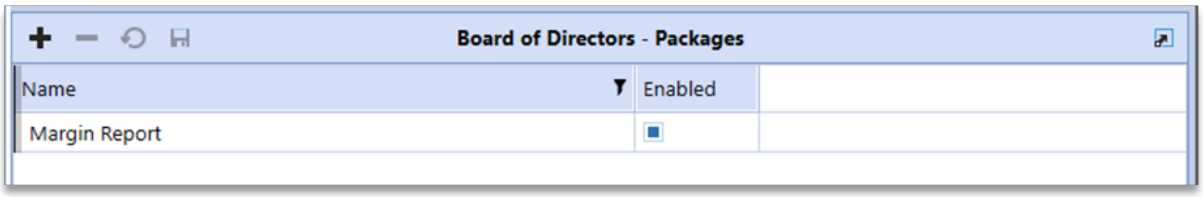


- **Name**: Name of the package group.
- **Public (True/False**: Controls the availability of the package group. If selected, the package group is available to all users on the OPS home page and can be managed by users assigned to the Manage Packages Group security role. If cleared, the package group is only available to the user that created the package and the OneStream or OPS Administrators.
- **Created By**: Displays the user's name that created the package group. This column is only displayed for OneStream and OPS Administrators.

- **Date Created**: Displays the date and time the package group was created. This column is only displayed for OneStream and OPS Administrators.

Packages – Package Group Level

The Packages section lists all the packages included in the package group.



- **Name**: Name of the package.
- **Enabled (True/False)**: Controls whether a package is enabled within a package group. Select to include the package in the package group. Clear to exclude the package.

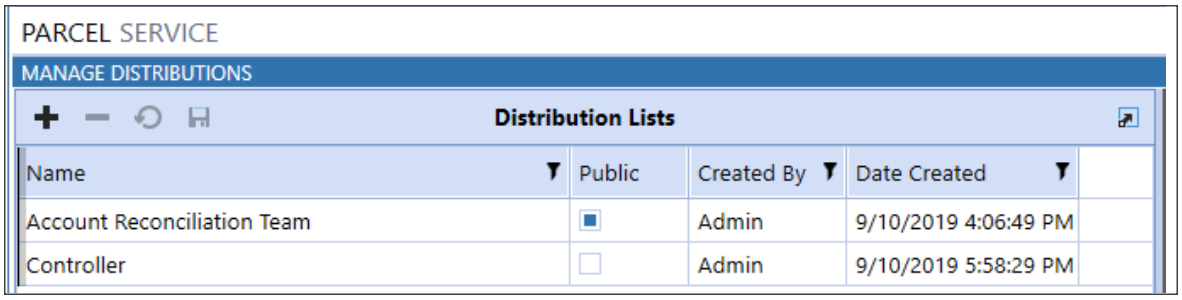
Supplied Parameters – Package Group Level

Each extensible document may have parameters that would normally prompt you when you run the file. When running a OPS package group, there is no prompt, so the parameters need to be specified before shipping packages. Supplied parameters are required for the selected extensible document content file, and upon processing will cascade through all documents located in the group of packages. This list of parameters defines the values that must be provided to the content file for the file to be executed without user input. These values can be added to the list manually.

- **Name**: Enter the name of the parameter.
- **Literal Value**: Literal value to use for the named parameter.

Manage Distribution Lists

Distribution lists contain the email addresses and file share locations you can use to send out packages.

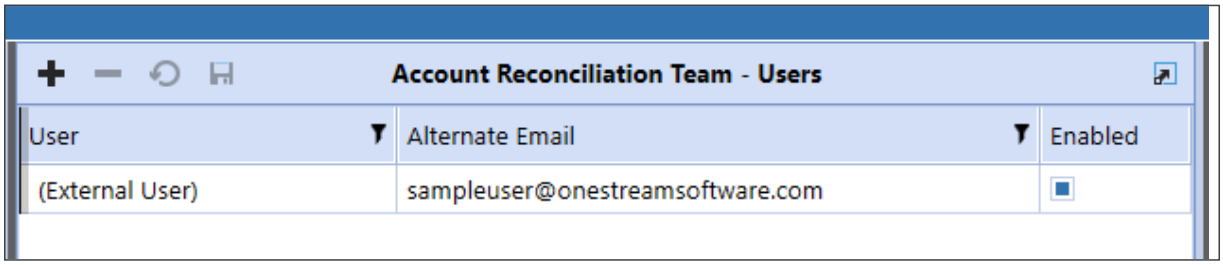


You can specify these settings:

- **Name**: Name of the distribution list.
- **Public (True/False)**: Select **True** to display the distribution list in the **Package Details** list so users with the Manage Distributions List can make selections. Select **False** to make the list available only to its creator and OneStream or OPS Administrators.
- **Created By**: User that created the distribution list. This column is only displayed for OneStream and OPS Administrators.
- **Date Created**: The date and time the distribution list was created. This column is only displayed for OneStream and OPS Administrators.

Distribution List - Users

The list of individual users to include in the distribution list.



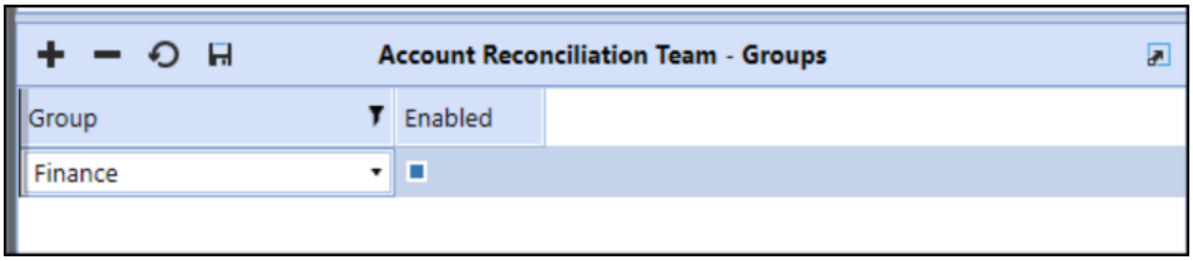
- **User**: Select a user from the drop-down menu. These users are included in the distribution list and their email addresses used during shipping.

  > **NOTE:** Select **External User** to enter an alternate email address.

- **Alternate Email**: Enter the email address to use instead of the email assigned to the OneStream User ID.
- **Enabled**: Select to add a user to the distribution list.

Distribution List - Groups

The security group members to include in the distribution list.



- **Group**: The OneStream Security Group members included in the distribution list.
- **Enabled (True/False)**: If selected, the security group is included in the distribution list. If cleared, the group is excluded from the distribution list.

Distribution List - Members

This section provides a preview of the combined user and group email distribution members for the distribution list. The list represents all individual members and all assigned security group members. You can copy the distribution list.

Account Reconciliation Team - Members		
User	Email	
(External User)	sampleuser@onestreamsoftware.com	

Help and Miscellaneous Information

This page contains solution documentation.

Display Settings

OneStream Platform and Solutions frequently display multiple data elements for data entry and analysis. To best render forms and reports, specify a minimum of 1920 x 1080 as your screen resolution. Also, set your Windows System Display text setting to 100% and do not use custom scaling options.

Package Contents and Naming Conventions

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

Example Package Name: OPS_PV8.0.0_SV100_PackageContents.zip

Identifier	Description
OPS	Solution ID
PV8.0.0	Minimum Platform version required to run solution
SV100	Solution version
PackageContents	File name

GetAllLiteralParams

Literal parameters are meant for static values and should not be used to hold values that change on a regular basis. Using a literal parameter in such a manner can cause issues with dashboard processing for users. Use input parameters for values that change regularly.

Solution Database Migration Advice

A development OneStream application is the safest method for building out a solution with custom tables such as this one. The relationship between OneStream objects such as workflow profiles and custom solution tables is that they point to the underlying identifier numbers and not the object names as seen in the user interface. Prior to the solution configuration and to ensure the identifiers match within the development and production applications, the development application should be a recent copy of the production application. Once the development application is created, install the solution and begin design. The following process below will help migrate the solution tables properly.

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

OneStream Solution Modification Considerations

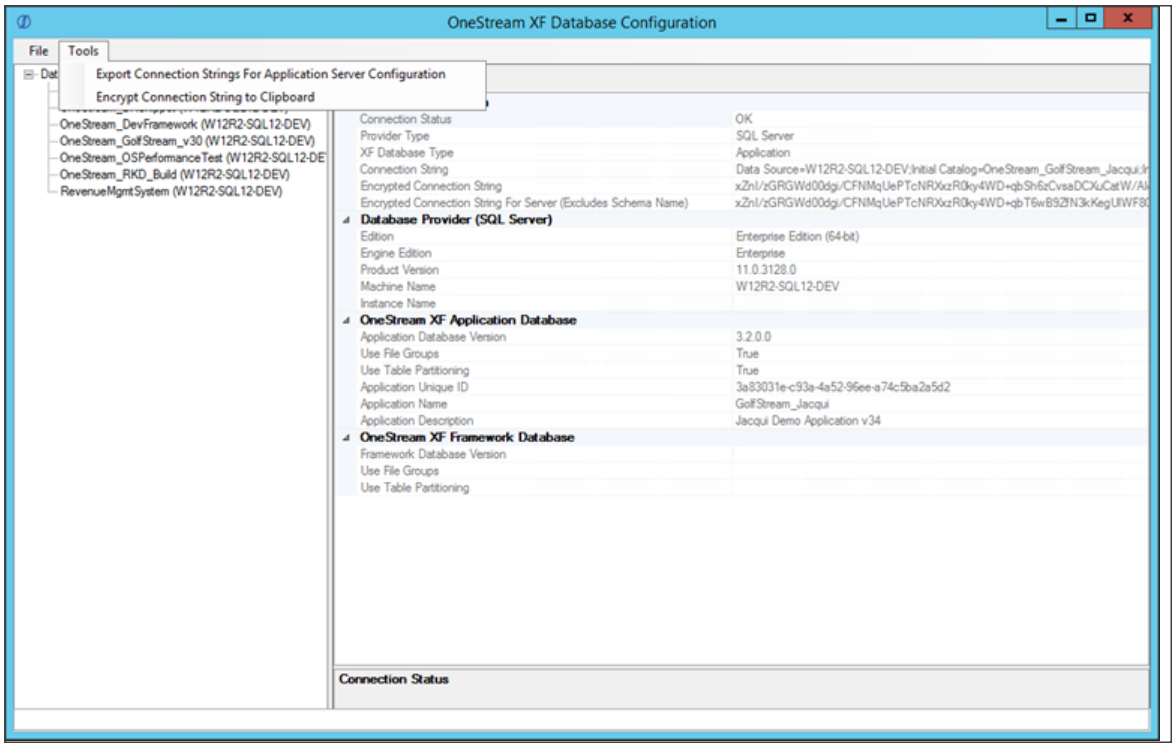
A few cautions and considerations regarding the modification of OneStream Solutions:

- Major changes to business rules or custom tables within a OneStream Solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any dashboard object or business rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the OneStream Solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.
- If modifications are made to a OneStream solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a dashboard do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.

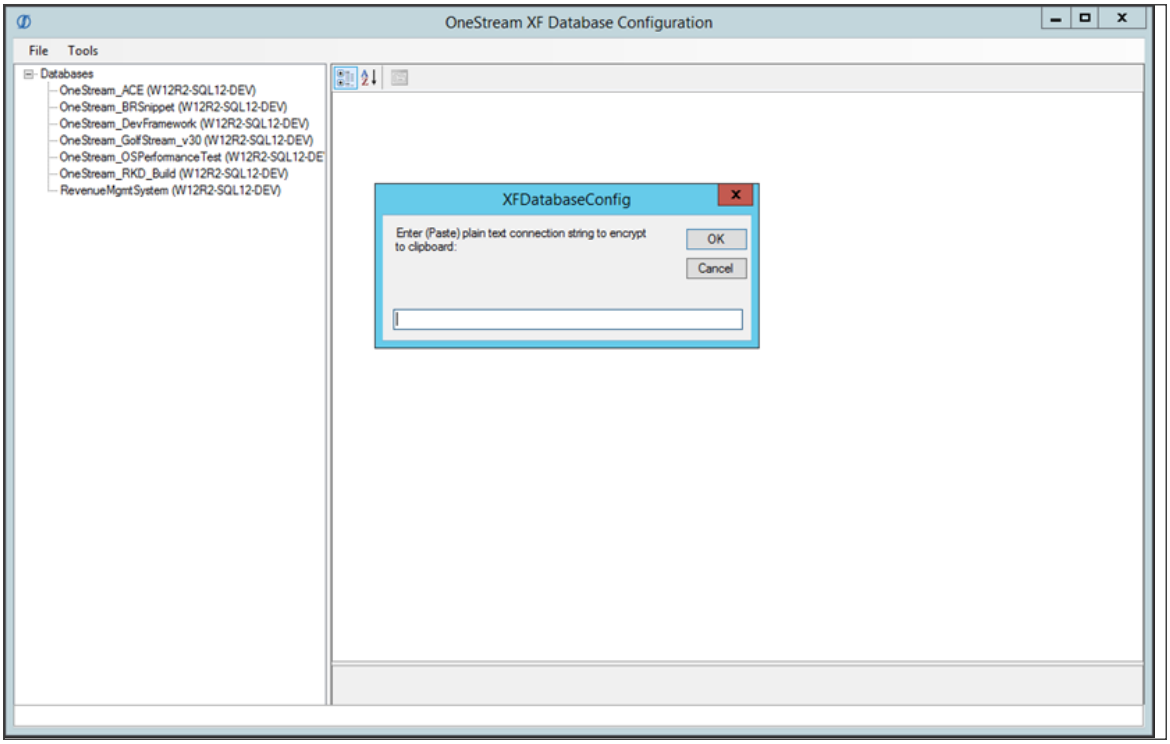
Appendix 1: Encrypt Connection Information

Perform these steps to encrypt the email connection string:

1. Open the OneStream Software Database Configuration Utility.



2. From **Tools**, select **Encrypt Connection String to Clipboard**.



3. Copy the email connection string into the Configuration Tool and click **OK**.

```
SmtpHost=[smtp.office365.com], SmtpPort=[587],

EnableSSL=[True], SmtpSourceMailAccount=
[userID@youremaildomain.com],

 SmtpSourceMailAccountPassword=[password]
```

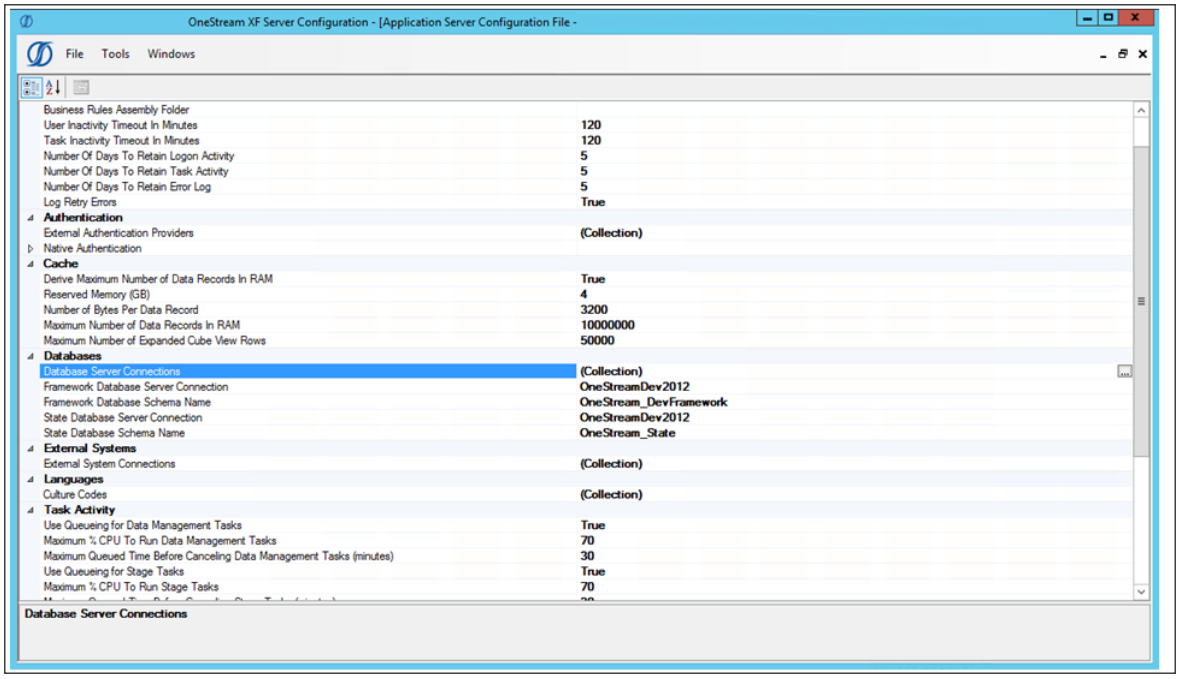
The encrypted string is then stored to the clipboard.


```
XScpcDzo3an7EWAAp6Wvz1IZWE3Q+Fo8DSx0OpacS0Yp5X4sHXti

QGdAoNmNGU48xOa3xD3C68yAl7B8aXUbv02lj4921ErgN2R+E1qlLG2

4pO8a62X0n/q4PS70xzosL7R9HzKWT0txtfbpJMUPYrIhCDz6Ubd52/
```

buVABQyUxf2c0Y1BmgIKE//6eOcMCv0D5abX6oKbEmZLlms7vXyuicD

KaYheBNX/vbtkA4=

4. Open the OneStream Software Application Server Configuration Tool.



5. Open **Database Server Connections**.

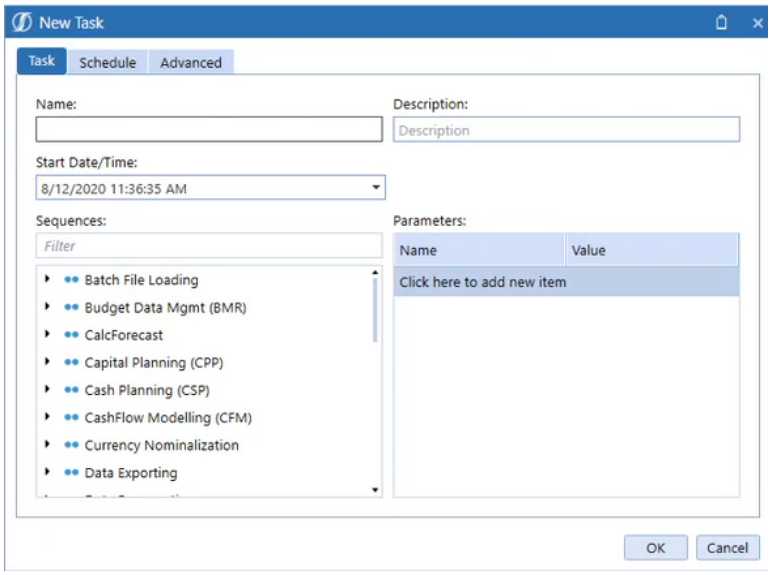
6. Add a new **Database Connection**.

Appendix 2: Create a Task With Task Scheduler

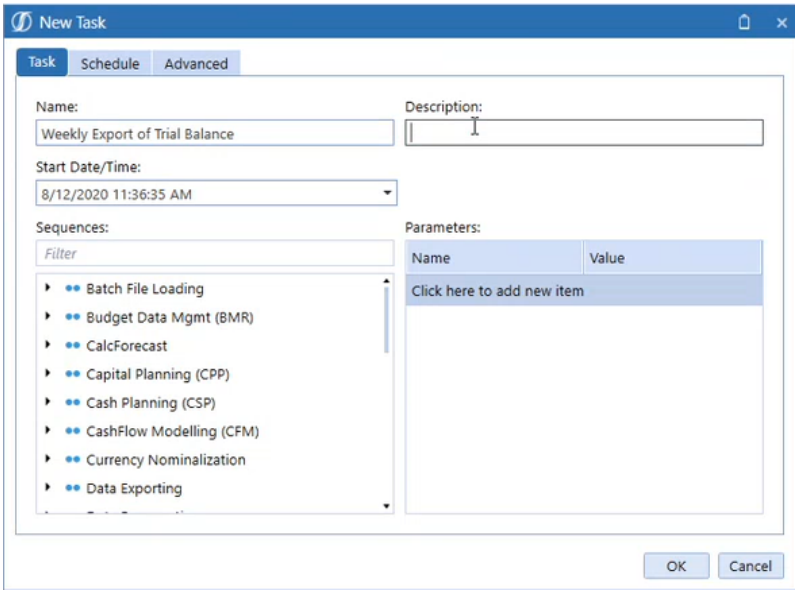
Document packages or package groups can be shipped on a scheduled basis using the OneStream Task Scheduler. See *Task Scheduler* in the *Design and Reference Guide*.

To create a task:

1. Click **Create Scheduled Task** .The **New Task** dialog box opens.

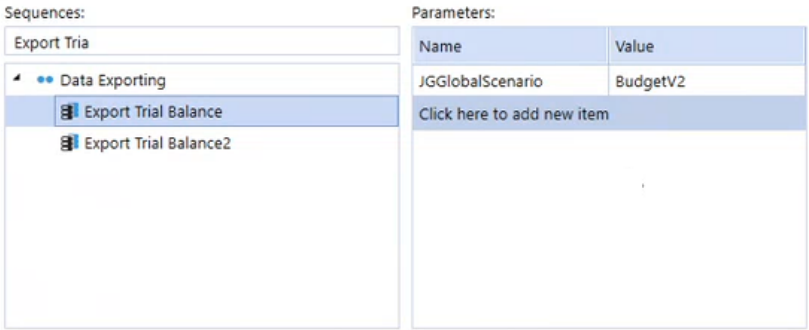


2. Click **Task**.

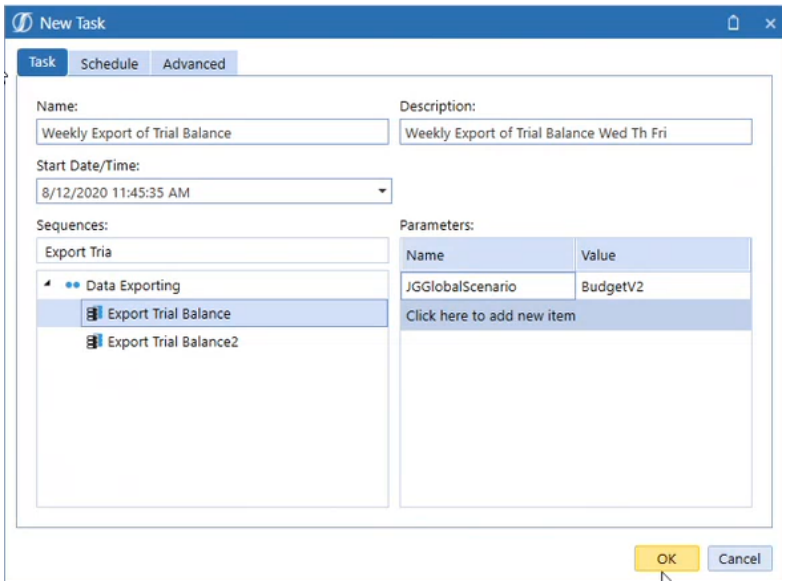


3. Enter the following details:

   - A task name and description.
   - A Start Date/Time that specifies when to run the task. If you do not specify a time, the current date and time are used.
   - A data management sequence. Scroll the list or find the sequence by entering the name in **Filter**.



- Any parameters assigned to a sequence display. Add and modify parameter settings as needed to ensure parameters are valid so the job will run.



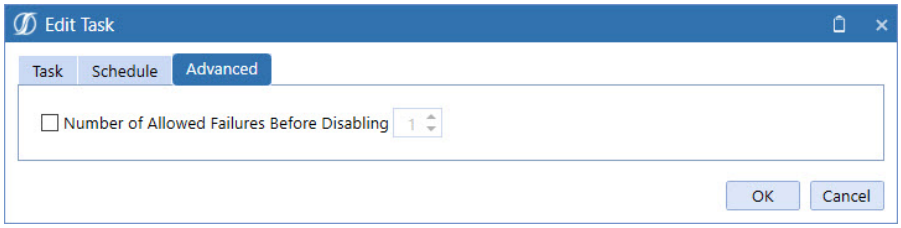
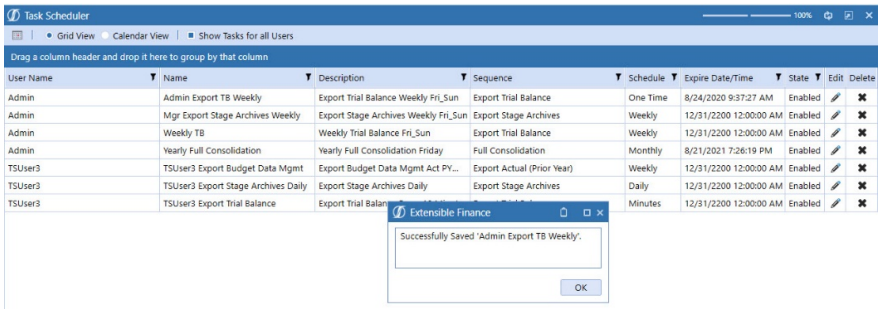
4. Click **Schedule** and specify these details:
   - Select **One Time** to run the task once given the time specified in **Start/Date Time**.
   - Select **Minutes** to consecutively run the task from 5 – 180 minutes. Set tasks to run during predetermined times by typing the start time in **Time From**, then typing when to stop in **To:**.

> **Example:** If a task is set to run every 30 minutes, starting at 2:30 pm and ending at 5:30 pm, the task runs fist at 2:30 pm, then every 30 minutes until 5:30 pm.

> **NOTE:** Calendar entries are created in the Calendar view even if they are outside the selected run time frame.

- Daily: you can choose how many times it recurs.
- Weekly: you can choose how many times it recurs and the days that it runs.
- Monthly: you can choose how many times it recurs and the days that it runs.
- Expire Date/Time: when and what time it should end.
- Enabled: if checked to run.
- Administration Enabled: if checked to run.

5. Click **Advanced** to set the number of times to retry a failed task. The maximum is three.



6. Click **OK** to add the task to the Grid View and the Calendar View.