



# Standard System Reports Setup Instructions

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PV430 SV102

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# Overview of Standard System Reports

The OneStream Standard System Reports Solution is a set of predefined System Dashboards that can be imported into any OneStream application and used for basic system reporting.

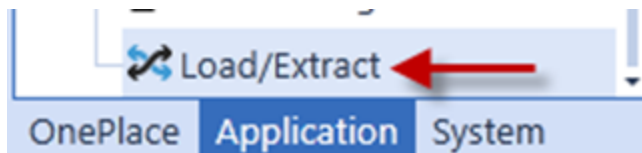
# Standard System Reports Setup


## How to Install

First, check the related Release Notes to determine if an Uninstall of the User Interface or a Full Uninstall is necessary and then see that chapter for instructions. If the Release Notes say that an overinstall is allowed, then proceed with these instructions from here:

Download the Standard System Reports Solution from the MarketPlace. The package is a zip file named RPTS\_PVxxx\_SVzzz\_PackageContents.zip where xxx and zzz represent version numbers for OneStream and the solution. The PVxxx number (for example, 430) represents the minimum Platform Version (for example, 4.3.0) required in order to implement this Solution Version (for example, SVxxx).

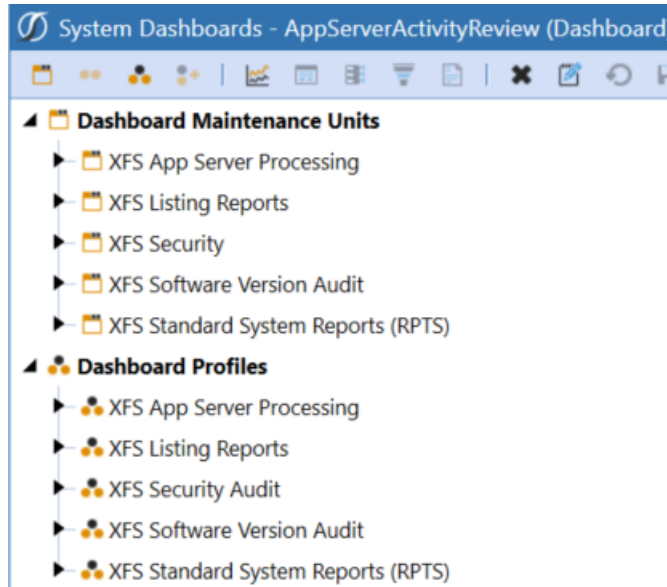
Log into OneStream , navigate to **Application Tab > Tools > Load/Extract**.



Click Select File, navigate to the zip file, and click Load .

## How to Manually Remove Previous Versions

The previously installed release of the Standard System Reports will not be overwritten with the upgrade. So, the old Dashboard Profiles and Dashboard Maintenance Units for XFS App Server Processing, XFS Listing Reports, XFS Security Audit and XFS Software Version Audit will still be displayed. These can be manually removed by System Administrators if desired. This is done by deleting the desired Dashboard Profile, the individual Dashboard Components in the related Maintenance Unit and then the related Maintenance Unit.



## Package Contents

It is not recommended to rename any included dashboard, dimension, member, and so on unless specified.

## Dashboard Maintenance Unit

### XFW Standard System Reports

This is Dashboard Maintenance Unit that provides the user interface for the Standard System Reports solution. It includes the Dashboard Groups, Components, Data Adapters, Parameters and Files used to build the solution.

# 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 also: "MarketPlace Solution Modification Considerations" on page 10

## Dependencies

Component	Description
OneStream 5.3.0 or later	Minimum OneStream Platform version required to install this version of Parcel Service.
OneStream App for Windows	Parcel Service is optimized for the OneStream Application for Windows which has all the functionality as the browser-based version of OneStream.
Microsoft SQL Server 2016 Standard SP1 or later	Parcel Service requires an instance of Microsoft SQL Server 2016 Standard SP1 or later.

## Select the Parcel Service Development Location

Before beginning 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 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 all the OneStream 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 Parcel Service project.




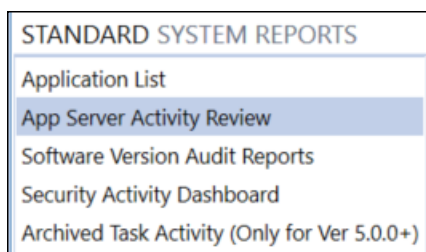
# Using Standard System Reports Dashboard

System Dashboards are predefined dashboard workspaces that provide information about the system such as the server, application and security. To access these System Dashboards, navigate to Dashboards under the System Tab.

The RPTS Dashboard displays in the Standard System Reports (RPTS) Dashboard Maintenance Unit.



Select the new Standard System Reports (RPTS) Dashboard and click the Show Reporting Page Button -  to initialize the Dashboard. The new Standard System Reports list will be displayed.




Select the Report to run. The App Server Activity Review and the Software Version Audit Reports will run for the selected number of days for the audit review.

## Using Standard System Reports Dashboard

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**NOTE:** Archived Task Activity (Only for Ver 5.0.0+) only works in OneStream application environments of version 5.0.0 or higher.

# Help & Miscellaneous Information

 This page contains additional solution documentation for Standard System Reports.

## Display Settings

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

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

## Package Contents & 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:** RPTS\_PV4.3.0\_SV102\_PackageContents.zip

Identifier	Description
RPTS	Solution ID
PV4.3.0	Minimum Platform version required to run solution
SV102	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 OneStreamApplication 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.

# MarketPlace Solution Modification Considerations

A few cautions and considerations regarding the modification of MarketPlace solutions:

- Major changes to business rules or custom tables within a MarketPlace 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 MarketPlace 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 MarketPlace 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.