onestream

Security Audit Reports Setup Guide

PV6.2.0 SV102

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Overview

The Security Audit Reports solution provides business users with an overview of user and group information for internal security audit purposes.

User Reports

User details are displayed in the following reports generated by the Security Audit Reports dashboard:

- Total Users
- Enabled Users
- Disabled Users
- Native Users
- Added Users
- Deleted Users
- Updated Users
- Inactive Users
- User List
- User List – Grid View
- User Change Audit
- User’s Group Membership
- User’s Group Change Audit

- User’s Security Roles
- User Deactivation

Group Reports

Group details are displayed in the following reports generated by the Security Audit Reports dashboard:

- Total Groups
- Added Groups
- Deleted Groups
- Updated Groups
- Group List
- Group Change Audit

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 6.2.0 or later	Minimum OneStream Platform version required to install this version of Security Audit Reports.

Select the Security Audit Reports 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 all the OneStream artifacts relating to Security Audit Reports such as **Workflow Profiles** and **Entities** are in the Production application.
2. Copy your Production OneStream application to your Development environment and rename it. This Development version is used for your Security Audit Reports project.

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

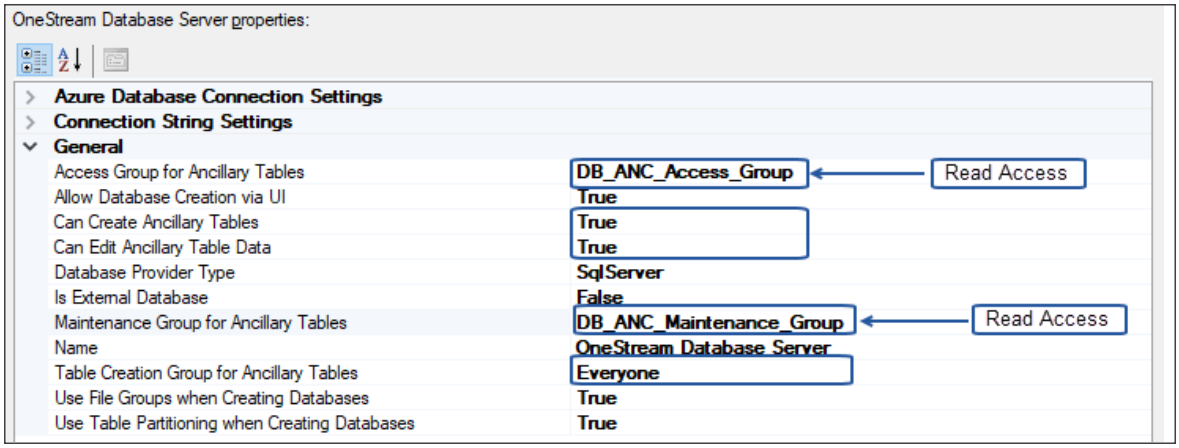
Be sure that the security group settings include the users who work on and set up the solution before proceeding.

> **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.



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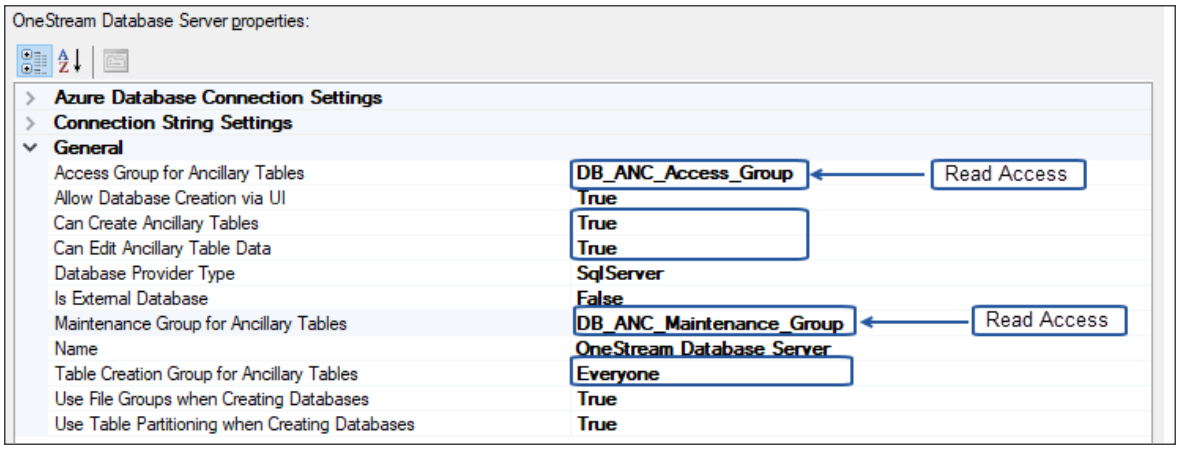

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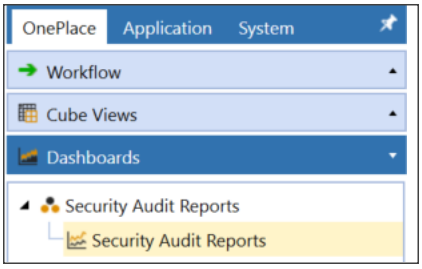
Install Security Audit Reports

1. On the OneStream Solution Exchange, go to **OneStream Solutions > Security Audit Reports**.

2. On the Security Audit Reports 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.

Set Up Security Audit Reports

- In OneStream, click **Community Solution > Dashboards > Security Audit Reports > Security Audit Reports**.



Package Contents

The Dashboard Maintenance Unit provides the user interface for Security Audit Reports and includes the required Dashboard Groups, Components, Data Adapters, Parameters and files.

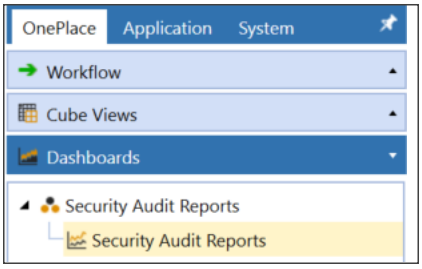
Business Rules

The following Business Rules are included:

- SAR_HelperQueries
- SAR_SolutionHelper
- SAR_ParamHelper

Set Up Security Audit Reports

- In OneStream, click **Community Solution > Dashboards > Security Audit Reports > Security Audit Reports**.



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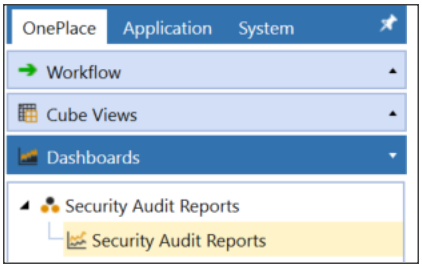

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Settings

The **Settings** page contains the **Global Options** and **Uninstall** tabs.

Global Options

The **Global Options** page contains key properties that guide global Security Audit Reports administration. It should be the first page accessed during the initial setup and configuration of Security Audit Reports.

> **NOTE:** All global option settings are retained during solution upgrades.

Security Role (Access Security Audit Reports)

Since security is governed at the global level, it is the assignment of the user group to the Security Role that determines who will be global Security Audit Reports Administrators. This group is granted access to all areas of Security Audit Reports and are the only users who can see the Settings Page icon.

Assign User Group to Security Role

- Click **Global Options**, select the user group from the drop-down list (the default value is **Administrators**), and click **Save**.

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- Click **Global Options**, select the user group from the drop-down list (the default value is **Administrators**), and click **Save**.

Uninstall

The Uninstall feature allows the Security Audit Reports User Interface or the entire solution to be uninstalled. Note that if part of an upgrade, any modifications performed on standard Security Audit Reports objects will be removed.

Click **Uninstall UI** to remove Security Audit Reports. This includes related dashboards and business rules but leaves the database and related tables in place. For some releases, you should perform this before accepting any new version of Security Audit Reports, since some of the dashboards or other objects may have been modified.

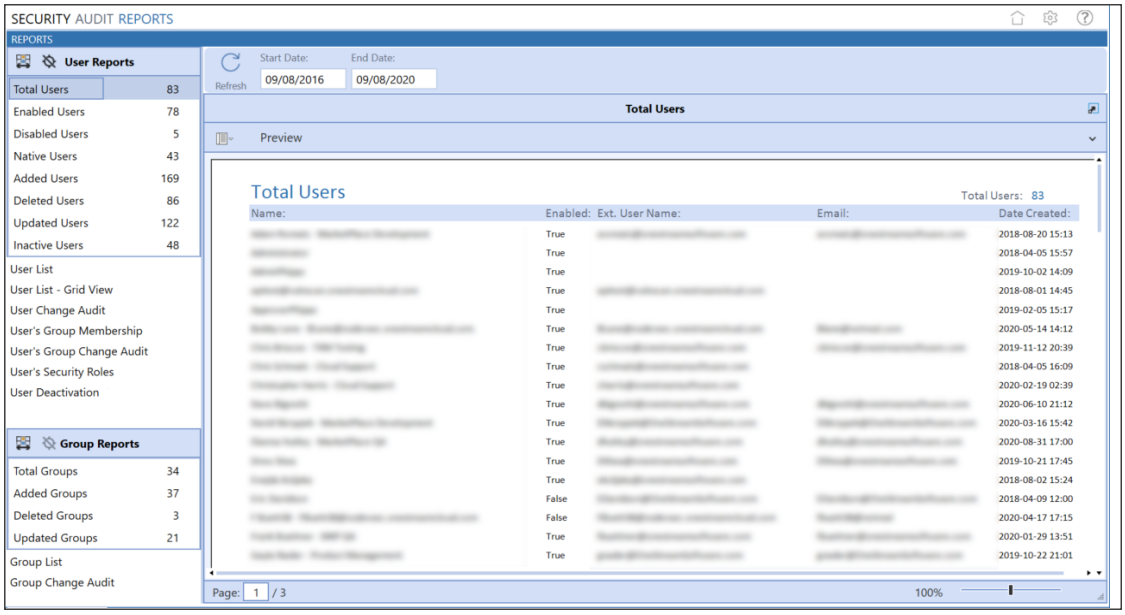
The Security Audit Reports Release Notes indicate if an overinstall is supported.

Security Audit Reports

Security Audit Reports is a self-contained solution based on SQL adapters with all reports designed in OneStream . It is ready for use as soon as it is imported into the application.

Run a Report

1. Click the name of the report you want to view.
2. Select or enter values in the fields above the report to filter the data shown in the report. For date fields, enter the dates in your local date format, for example MM/DD/YYYY.
3. Click **Refresh** or **Run** to display the report.



> **NOTE:** You can change one or both dates of a reporting period as frequently as needed. Click Refresh or Run after each change to update the results.

See User and Group Report Filters for descriptions of the filters you can apply to each report.

User and Group Report Filters

Security Audit reports have filters that you can apply to further define the user or group information you want to view. Filters available for a specific report appear in the header bar above the report.

Start Date/End Date

You must specify a date range for the data to be included in the report. Select a start date and end date to specify the date range, then click **Refresh** or **Run**.

Enabled

This filter is available with the following reports:

- Inactive Users
- User List
- User's Group Membership
- User's Security Roles

Click the **Enabled** drop-down and specify whether you want to show enabled (**True**), disabled (**False**), or all (**Both**) users listed on the report.

Name

This filter is available with the **User's Group Membership** and **User's Security Roles** reports only. Type the name of a single user by which to filter the report. The name you

enter must be a valid user.

Description

This filter is available with the **User's Group Membership** and **User's Security Roles** reports only. Type a description by which to filter the report. The description you enter must be a valid description.

Text1, Text2, Text3, Text4

These are freeform text fields you can use to further identify a user or group users based on common text in one of these fields. These filters are available with the **User's Group Membership** and **User's Security Roles** reports only.

Type descriptive text in any of these fields.

Stop Button

While security reports are printing to the **Report** pane, a **Stop** button appears at the bottom of the pane. Use this button to stop the report from completing.

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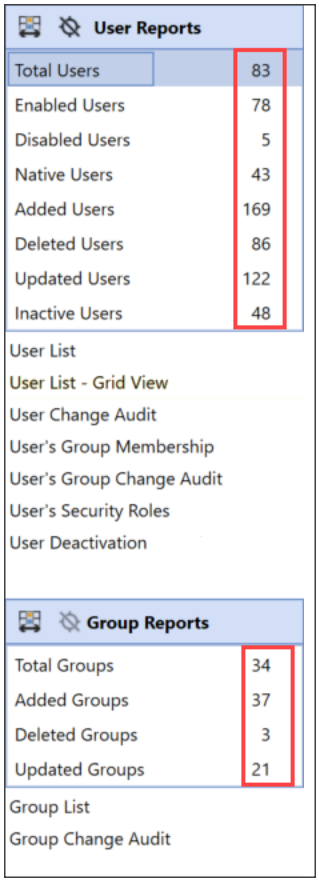
User Reports/Group Reports Panes

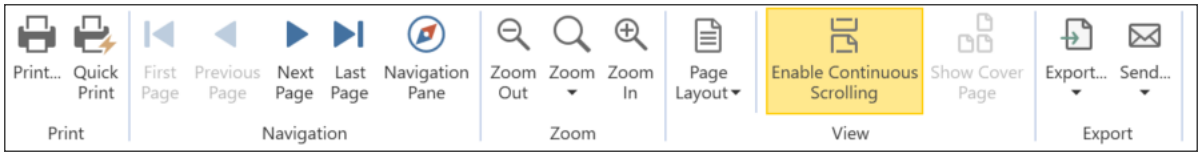
The **User Reports** and **Group Reports** panes display to the left of the Report Viewer pane. These panes list the available Security Audit user and group reports. User and group reports that include a count of the matching records also display that count next to the report name, as shown in the following graphic.



Click the name of a report in either of these panes to view the report with default filtering applied to the report.

Report Viewer Button Bar

While viewing a report, you can use buttons in the Report Viewer button bar 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.

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.

For some reports you can click **Navigation Pane** to display a navigation pane next to the Report Viewer, which lets you find specific data on 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 let you 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.

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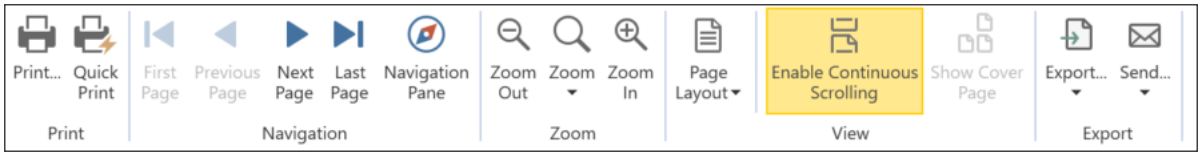

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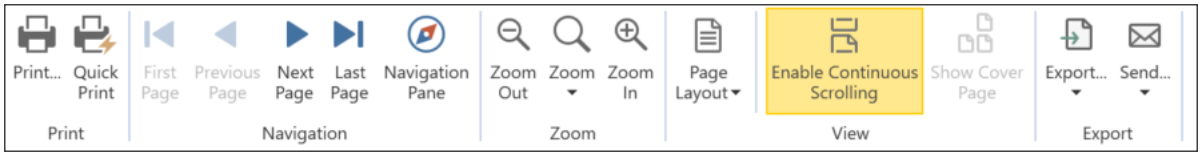

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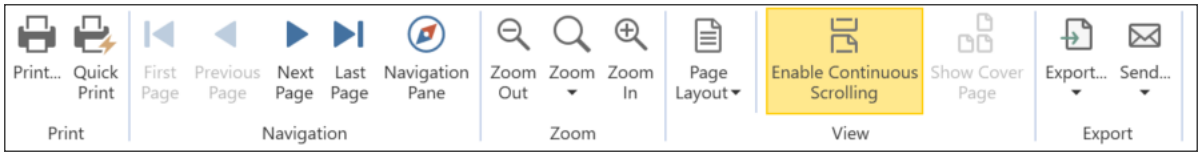

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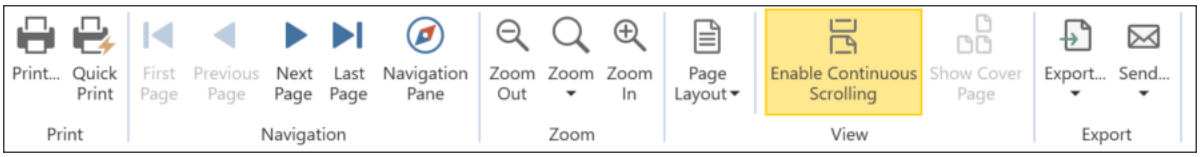

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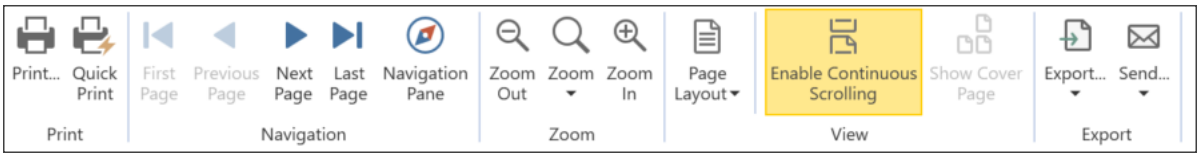


Print

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.

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.

For some reports you can click **Navigation Pane** to display a navigation pane next to the Report Viewer, which lets you find specific data on 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 let you 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.

Report Navigation

Reports that include user groups let you use the available Navigation pane to further refine or locate data needed for your security audit. This is especially useful when working with very long documents, or when you need to quickly find specific data to complete your security audits.

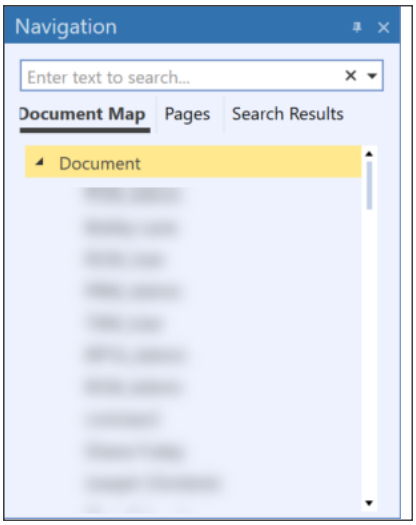
The Report Navigation pane is available with the following reports:

- User’s Group Membership
- User’s Security Roles

Tabs in the Report Navigation pane are as follows.

Document Map Tab

Use this tab to view a heading outline of the report and to navigate to specific headings in the current report. To navigate to a specific header, simply click the name of the header in the Document Map tab. All levels of headings display in the tab, so you can quickly move between headings in the report.



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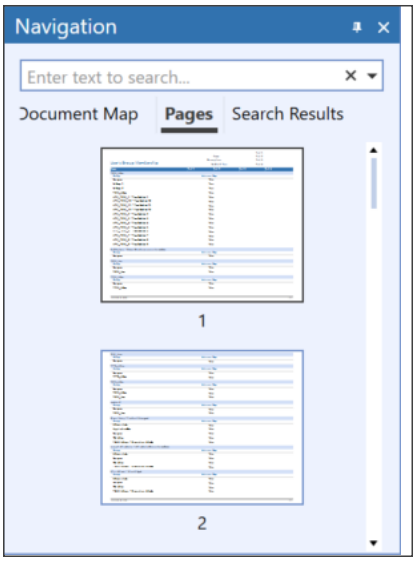
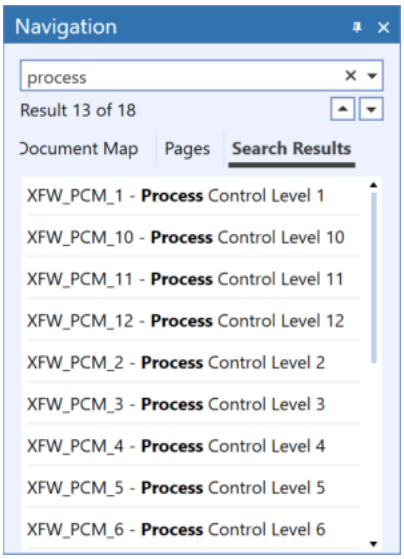
Click this tab to view thumbnail sketches of each page in the current report. You can click on any page in the thumbnails to navigate to that page.


Navigation
Enter text to search...
Document Map
Pages
Search Results
1
2

Search Results

The Navigation pane lets you search for specific data and see the number of hits there are in the document for your search. Use the Up and Down arrows in the search results to navigate through the matched search results. The **Search Results** pane shows each instance of a search hit in the document. As you go through search results, the **Search Results** tab highlights the current search hit instance, and the report automatically navigates to the page containing the search hit.



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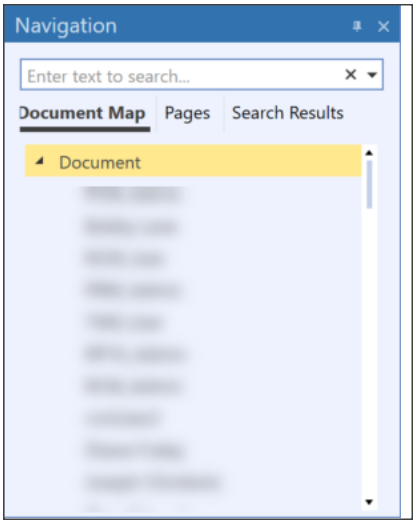

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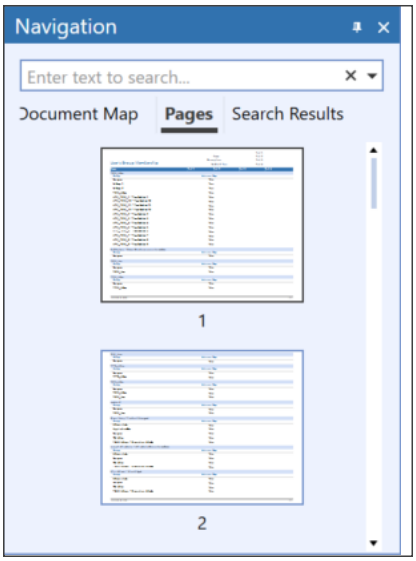
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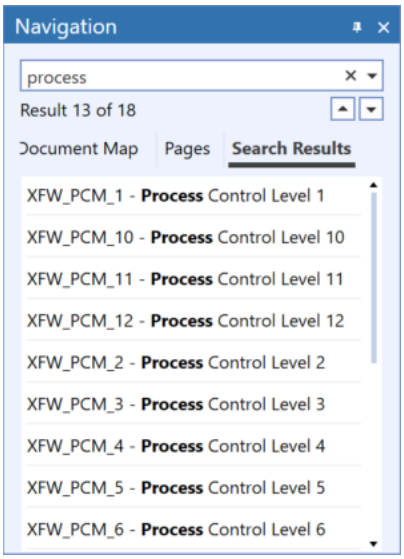

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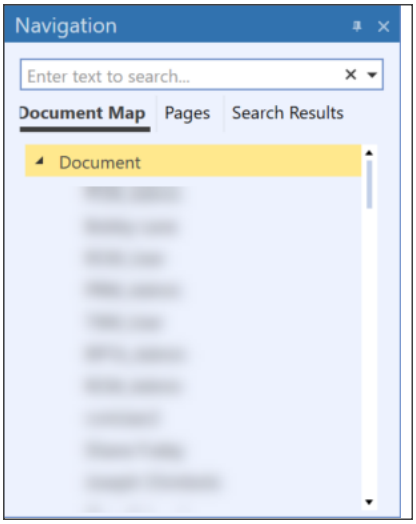

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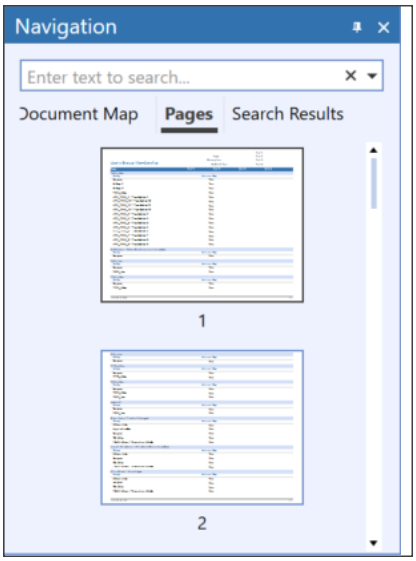
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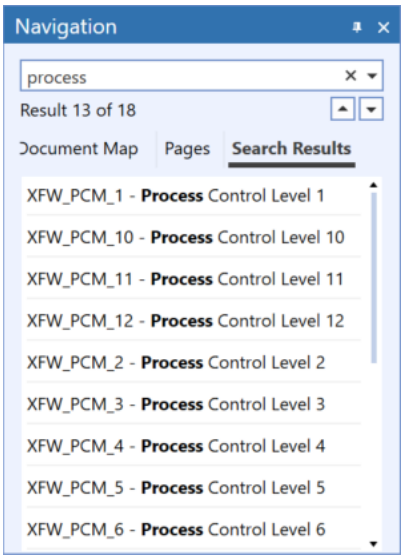

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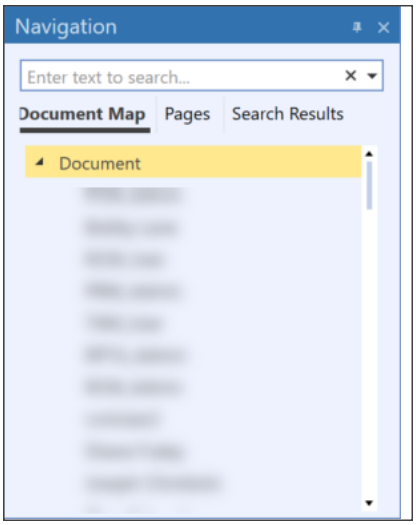

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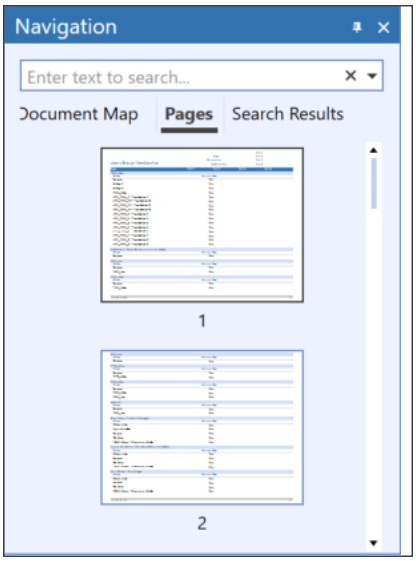

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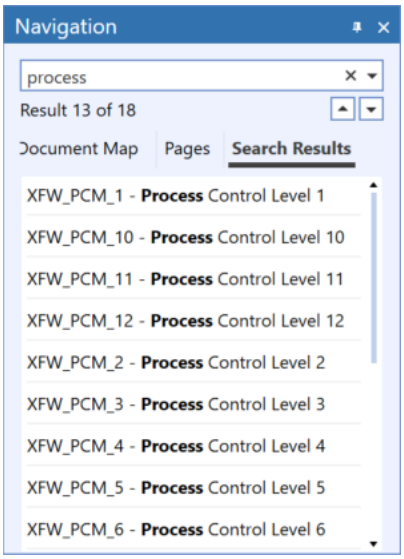


User Reports

> **NOTE:** Sensitive data in reports graphics shown in this section has been blurred for data protection.

See User and Group Report Filters for information on applying filters to reports.

Data shown on User reports is defined in OneStream (**System > Security > Users**) when setting up system security roles.

Total Users

This report lists critical status information for each user defined in OneStream. Each user created within the start date/end date range displays in the report. Records display in alphabetical order by name. Each user record in the report also includes the external user name, the user's email address, the date the record was created, and whether the user is enabled or disabled in the system.

The report also lists the total number of users currently defined in OneStream on the top of the report for quick reference.

Total Users

Total Users: 83

Name:	Enabled:	Ext. User Name:	Email:	Date Created:
[illegible]	True	[illegible]	[illegible]	2018-08-20 15:13
[illegible]	True			2018-04-05 15:57
[illegible]	True			2019-10-02 14:09
[illegible]	True	[illegible]		2018-08-01 14:45
[illegible]	True			2019-02-05 15:17
[illegible]	True	[illegible]	[illegible]	2020-05-14 14:12
[illegible]	True	[illegible]	[illegible]	2019-11-12 20:39
[illegible]	True	[illegible]		2018-04-05 16:09
[illegible]	True	[illegible]		2020-02-19 02:39
[illegible]	True	[illegible]	[illegible]	2020-06-10 21:12
[illegible]	True	[illegible]	[illegible]	2020-03-16 15:42
[illegible]	True	[illegible]	[illegible]	2020-08-31 17:00
[illegible]	True	[illegible]	[illegible]	2019-10-21 17:45
[illegible]	True	[illegible]		2018-08-02 15:24
[illegible]	False	[illegible]	[illegible]	2018-04-09 12:00

Enabled Users

This report lists all users in OneStream who are currently enabled. Users display in alphabetical order by name. The report shows the total number of enabled users, and shows the extended user name and email address for each enabled user, along with the time stamp of when the user record was created.

Enabled Users

Total Enabled Users: 69

Name:	Enabled:	Ext. User Name:	Email:	Date Created:
	True			2018-08-20 15:13
	True			2018-04-05 15:57
	True			2019-10-02 14:09
	True			2018-08-01 14:45
	True			2019-02-05 15:17
	True			2020-05-14 14:12
	True			2019-11-12 20:39
	True			2018-04-05 16:09
	True			2020-02-19 02:39
	True			2020-06-10 21:12
	True			2020-03-16 15:42
	True			2019-10-21 17:45
	True			2018-08-02 15:24
	True			2020-01-29 13:51

Disabled Users

This report lists all users in OneStream who are currently disabled. Records display in alphabetical order by name. The report shows the total number of disabled users at the top of the report for quick reference, and shows the extended user name and email address for each enabled user, along with the time stamp of when the user record was disabled.

Disabled Users

Total Disabled Users: 5

Name:	Enabled:	Ext. User Name:	Email:	Disabled Date:
	False			2020-03-17 11:48
	False			2020-04-17 17:16
	False			2019-11-20 19:20
	False			2019-11-20 19:20
	False			2019-11-20 19:23

Native Users

Every OneStream user is assigned a user ID. Users can be added as native users or as references to users stored in user repositories such as an Active Directory. This report shows those users defined as native users in OneStream.

Records display in alphabetical order by name. The total number of native users displays at the top of the report for quick reference. Each native user record on the report also shows the user's email address and the enabled status, along with the time stamp of when the user record was created.

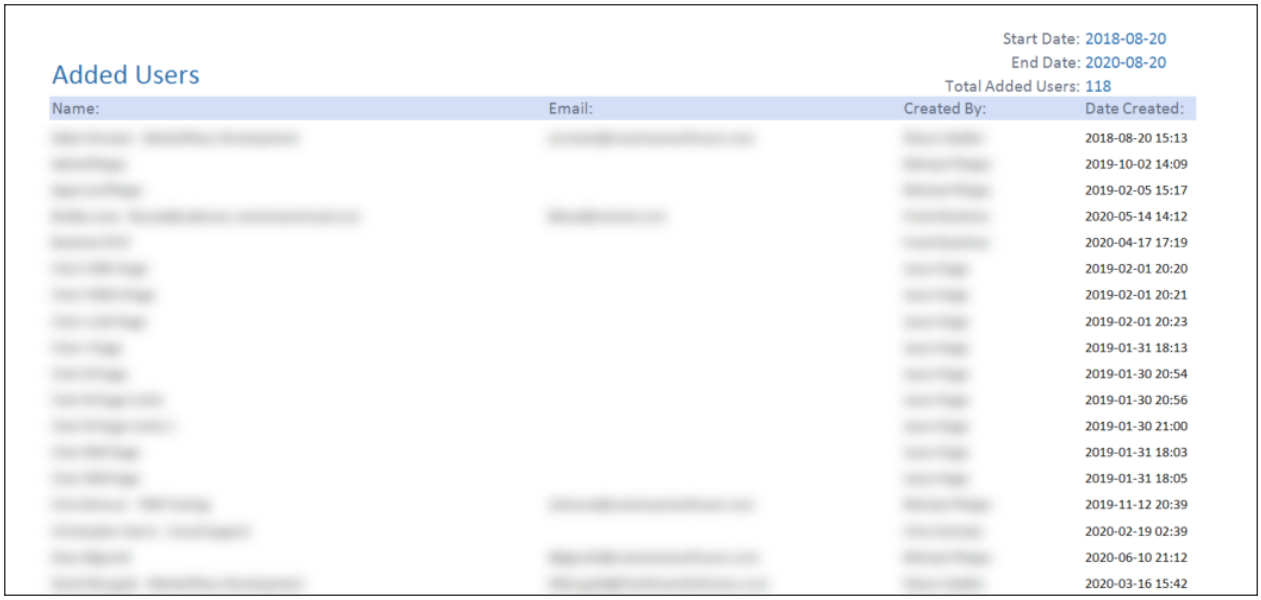
Native Users

Total Native Users: 38

Name:	Enabled:	Email:	Date Created:
	True		2018-04-05 15:57
	True		2019-10-02 14:09
	True		2019-02-05 15:17
	True		2019-06-27 15:23
	True		2019-03-04 15:06
	True		2019-06-13 16:11
	True		2019-02-05 17:37
	True		2019-06-13 18:17
	True		2019-06-13 18:17
	True		2018-08-03 17:51
	True		2018-08-03 19:34
	True		2018-08-03 19:34
	True		2019-01-08 15:04
	True		2019-01-08 18:29

Added Users

This report lists the users added within a specified date range. Users display in alphabetical order by name. The total number of users added within the date range displays at the top of the report for quick reference, along with the specified report date range. Each user shown on the report also shows the user's email address and who added the user, along with the time stamp of when the user was added.



Added Users

Start Date: 2018-08-20
End Date: 2020-08-20
Total Added Users: 118

Name:	Email:	Created By:	Date Created:
			2018-08-20 15:13
			2019-10-02 14:09
			2019-02-05 15:17
			2020-05-14 14:12
			2020-04-17 17:19
			2019-02-01 20:20
			2019-02-01 20:21
			2019-02-01 20:23
			2019-01-31 18:13
			2019-01-30 20:54
			2019-01-30 20:56
			2019-01-30 21:00
			2019-01-31 18:03
			2019-01-31 18:05
			2019-11-12 20:39
			2020-02-19 02:39
			2020-06-10 21:12
			2020-03-16 15:42

Deleted Users

This report lists the users deleted within a specified date range. Records display in alphabetical order by name. The total number of users deleted within the date range displays at the top of the report for quick reference, along with the specified report date range. Each deleted user on the report also shows the user's email address and who deleted the user, along with the time stamp of when the user was deleted.

Deleted Users

Start Date: 2018-08-20
End Date: 2020-08-20
Total Deleted Users: 65

Name:	Email:	Deleted By:	Date Deleted:
[illegible]	[illegible]	[illegible]	2020-05-14 14:14
[illegible]	[illegible]	[illegible]	2019-02-01 20:53
[illegible]	[illegible]	[illegible]	2019-02-01 20:54
[illegible]	[illegible]	[illegible]	2019-02-01 20:54
[illegible]	[illegible]	[illegible]	2019-01-31 18:39
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[illegible]	[illegible]	[illegible]	2019-02-01 20:54
[illegible]	[illegible]	[illegible]	2019-02-01 20:54
[illegible]	[illegible]	[illegible]	2019-01-31 18:42
[illegible]	[illegible]	[illegible]	2019-02-01 20:54
[illegible]		[illegible]	2020-05-11 20:12
[illegible]	[illegible]	[illegible]	2020-05-14 14:52
[illegible]	[illegible]	[illegible]	2020-06-02 11:25

Updated Users

This report lists the users whose user information was updated within a specified date range. The total number of users updated within the date range displays at the top of the report for quick reference, along with the specified report date range. Each updated user record on the report also shows the audit user who last updated the user, along with the time stamp of when the user was updated.

Updated Users

Start Date: 2018-08-20
End Date: 2020-08-20
Total Updated Users: 95

	Audit User:	Audit Time:
[illegible]	[illegible]	1/25/2019 5:55:45 PM
[illegible]	Audit User:	Audit Time:
	[illegible]	8/27/2018 2:23:52 PM
[illegible]	Audit User:	Audit Time:
	[illegible]	1/25/2019 7:13:26 PM
[illegible]	Audit User:	Audit Time:
	[illegible]	6/2/2020 11:25:06 AM
[illegible]	Audit User:	Audit Time:
	[illegible]	10/8/2019 8:05:50 PM
[illegible]	Audit User:	Audit Time:
	[illegible]	3/24/2020 5:01:06 PM

Inactive Users

This report lists the users who have not logged onto the system since the start date specified for the report. Records display in alphabetical order by name. The total number of users who have not logged on since the start date displays at the top of the report for quick reference, along with the number of users who did not log on during that period. A blank last logon date means the user has never logged on.

Each added user record on the report also shows the user's last logon date, who created the user record, along with the time stamp of when the user record was created. You can further filter the users who appear on the report by their enabled status.

User Inactivity

Inactive Users Since: 2018-08-20 Total: 45

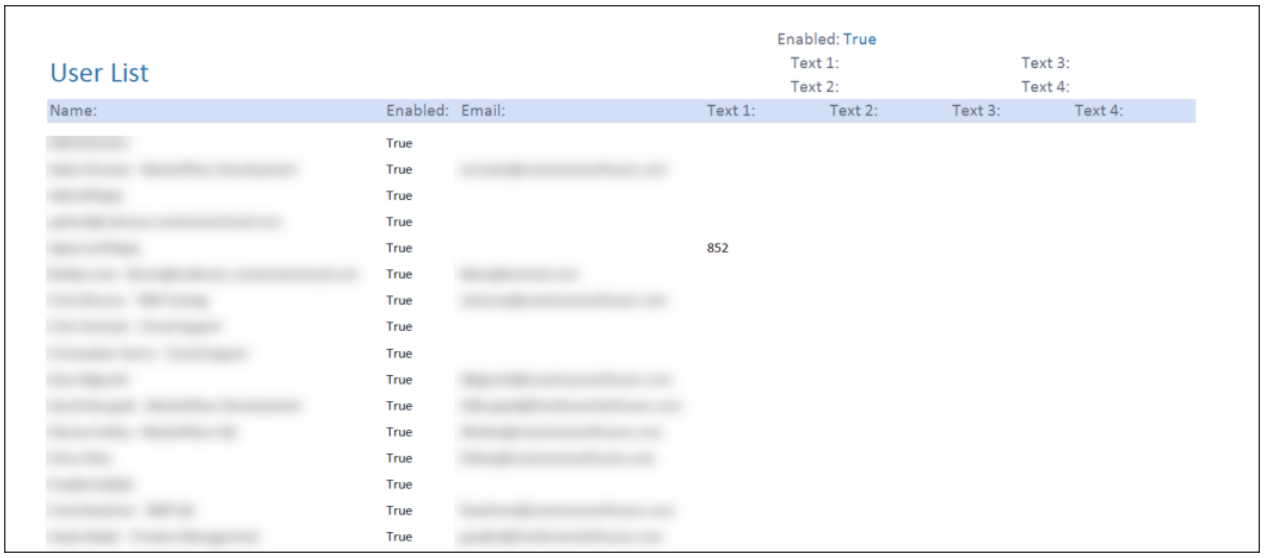
Name:	Enabled:	Last Logon Date:	Created By:	Date Created:
[illegible]	True		[illegible]	2019-10-02 14:09
[illegible]	True		[illegible]	2018-08-01 14:45
[illegible]	True		[illegible]	2019-02-05 15:17
[illegible]	True		[illegible]	2020-05-14 14:12
[illegible]	True		[illegible]	2019-11-12 20:39
[illegible]	True		[illegible]	2018-08-02 15:24
[illegible]	False		[illegible]	2018-04-09 12:00
[illegible]	False		[illegible]	2020-04-17 17:15
[illegible]	True		[illegible]	2019-10-21 17:48
[illegible]	True		[illegible]	2019-03-04 15:06
[illegible]	False		[illegible]	2019-11-12 20:38

User List

This report shows critical status information for each user defined in OneStream. Each user created within the start date/end date range displays in the report. Records display in alphabetical order by name.

You can further filter the users that display in the report by their enablement status, and by any of the free form text fields. Filtering criteria used for the report displays at the top of

the report. Each user record in the report also includes the user's email address, the enablement status, and any text entered in any of the free form text fields.



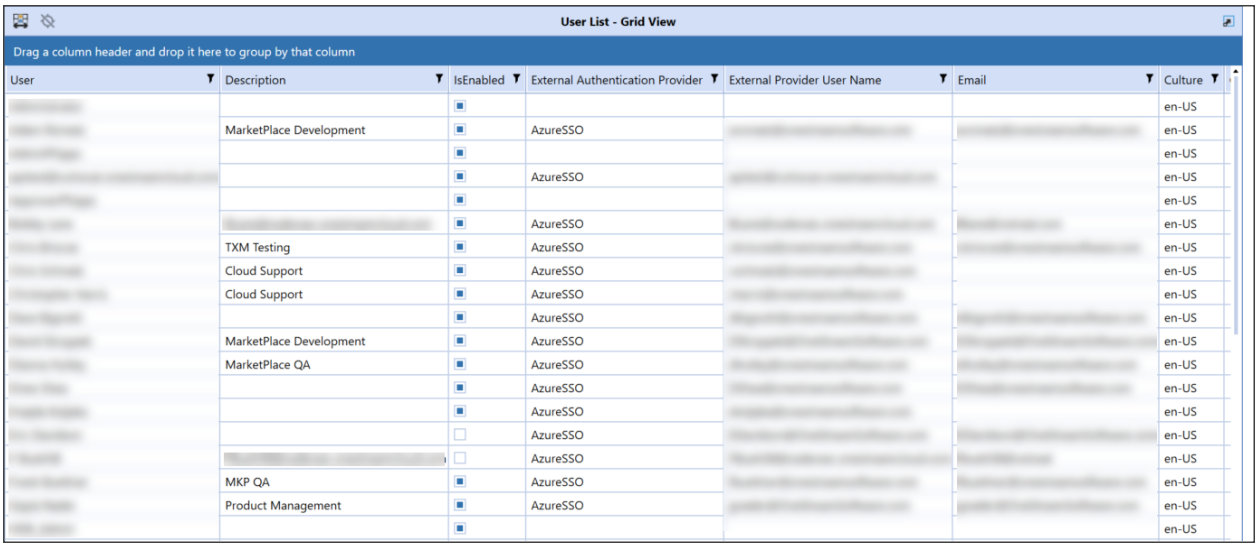
User List

Enabled: True
Text 1:
Text 2:
Text 3:
Text 4:

Name:	Enabled:	Email:	Text 1:	Text 2:	Text 3:	Text 4:
	True					
	True					
	True					
	True					
	True		852			
	True					
	True					
	True					
	True					
	True					
	True					
	True					
	True					
	True					
	True					
	True					

User List – Grid View

The User List – Grid View Report shows all information about all user records in a grid. Use grid features to create a highly customized report that shows exactly which user records you want to see, what data you want to see, and how you want to see those user records grouped.



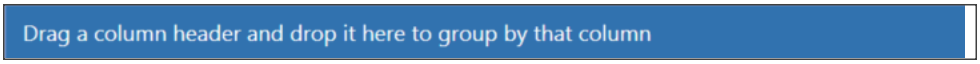
User	Description	IsEnabled	External Authentication Provider	External Provider User Name	Email	Culture
		■				en-US
	MarketPlace Development	■	AzureSSO			en-US
		■				en-US
		■	AzureSSO			en-US
		■				en-US
		■	AzureSSO			en-US
	TXM Testing	■	AzureSSO			en-US
	Cloud Support	■	AzureSSO			en-US
	Cloud Support	■	AzureSSO			en-US
		■	AzureSSO			en-US
	MarketPlace Development	■	AzureSSO			en-US
	MarketPlace QA	■	AzureSSO			en-US
		■	AzureSSO			en-US
		■	AzureSSO			en-US
		□	AzureSSO			en-US
		□	AzureSSO			en-US
	MKP QA	■	AzureSSO			en-US
	Product Management	■	AzureSSO			en-US
		■				en-US

Manage Grid Items

The grid in the User List - Grid View report provides several features that let you group, filter, and display the data, items and columns in the grid.

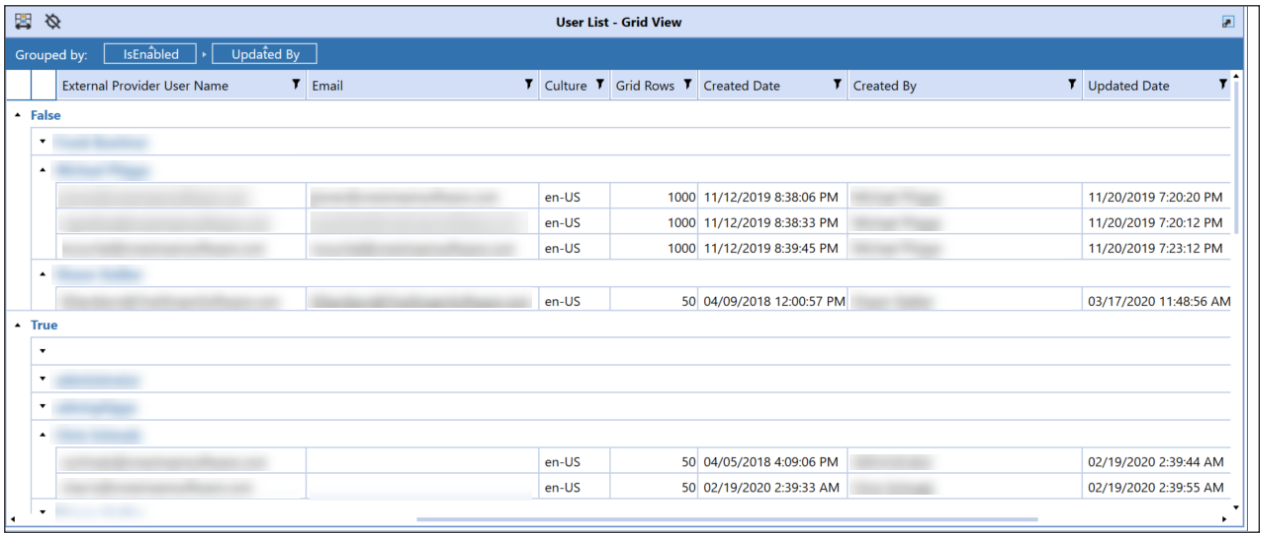
Group Grid Items

In User List - Grid View report grid, you can drag and drop column headers to the dark blue bar on top of the column headers to group and display grid items by the dropped column.



Any column or combination of columns can be used. For example, to group by the user and whether the user is enabled in the system, first drag the User column head up to the bar at the top of the grid, then do the same with the IsEnabled column head. Dragging and dropping any column head to this area changes it to the Grouped by bar and displays the column head names that you drop into it.

The following image shows the grid in the **User List - Grid View** report with the tasks grouped first by the IsEnabled column value (which returns **False** or **True**), then by the Updated By column value. Grouped list items display in alphabetical order.

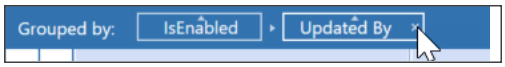


Column groupings are updated and display as soon as the column is dropped into the bar. When more than one grouping is used, groupings display as nested within its higher-level grouping. For example, the previous image lists the users by whether the user is enabled in OneStream, then within each status, users are grouped by the date the user's record was updated.

Expand or collapse grouped items by clicking **Expand** and **Collapse** on the top left of each grouping.

Any column groupings you make are retained between Security Audit Reports sessions. Groupings stay in place until you change them or remove them.

To remove a grouping, hover over the column group you want to remove, then click the x that appears in the group box. You can also click the column group head in the Grouped by bar and drag it anywhere outside of the bar to remove it. Removing all groupings restores the list to its original state.



You can also change the list of items within groupings between ascending order and descending order by clicking the ascending/descending widget on the top of the column group box.

When grouping grid items by multiple groups, you can also easily change grouping hierarchy by dragging and dropping a grouping box to the desired grouping level.

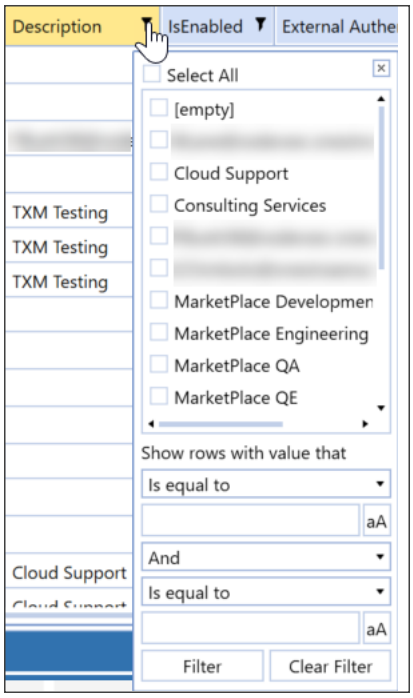
Filter Items that Display in a Grid

Grids allow you to use filters to display a subset of the grid's items. This is useful when working with large numbers of items in a grid and lets you easily focus on the items you need to work with.

Any column reordering stays in state until you change it. In other words, column ordering is remembered and retained from session to session until changed.

Any grid with columns that include the **Filter** button in the column head let you use filtering criteria to display the items that meet the filtering criteria you define for that column.

In any grid column, you can click the **Filter** button to display the **Filter Criteria** dialog box.



Start by selecting the specific items to include in the filter. Items that you can choose from are based on specific item values available in the selected column. You can select all items, specific items, or a single item for filtering.

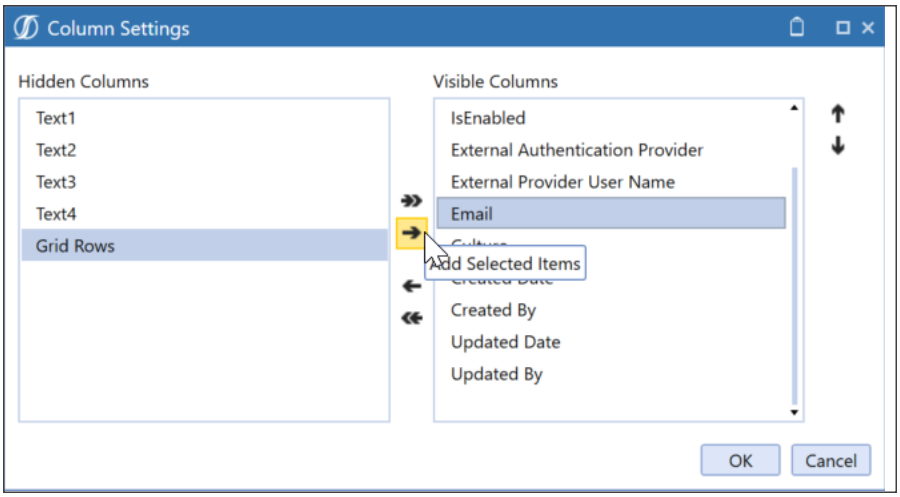
Use the remaining fields to optionally build a filter expression to further filter the items to display in the grid. Use the fields to define the logical operators and relational operators in the filter expression. When a logical operator requires a value, use the text box below the logical operator list box to enter the value. Click the button next to the value if you want case matching to apply to the entered value.

Click **Filter** to apply the filter to the selected task group or task list.

Set and Order Grid Columns

You can click the **Column Settings** button to determine which columns to display and the left-to-right order in which the columns display in the **User List – Grid View** report. This allows you to easily focus on just the data you need to see.

The **Column Settings** dialog box lets you select the columns to display in the **Task Groups** and **Tasks** panes of the **Task Administration** page.



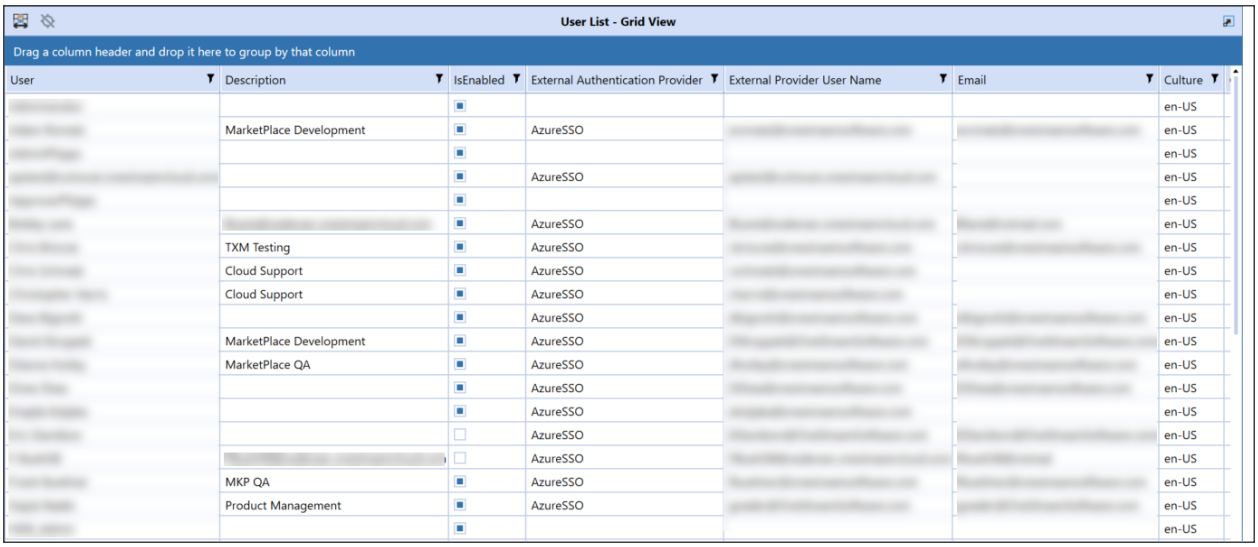
Select columns names in either the **Visible Columns** list or the **Hidden Columns** list and use the left-to-right and right-to-left arrows to move the selected columns names from one list to the other. You can hold down the SHIFT key to select multiple sequential column names, or you can hold down the CTRL key and select multiple non-sequential columns names. Then use the arrows to move the selected column names from one list to the other. Use the **Add All Items** or **Remove All Items** arrows to move all items from one list to the other.

The **Visible Columns** list shows the order in which columns display. To reorder a column in the display, select the heading name from the **Visible Columns** list, then use the **Move Up** and **Move Down** buttons to set where the selected column displays.

See Manage Grid Items.

User List – Grid View

The User List – Grid View Report shows all information about all user records in a grid. Use grid features to create a highly customized report that shows exactly which user records you want to see, what data you want to see, and how you want to see those user records grouped.



User	Description	IsEnabled	External Authentication Provider	External Provider User Name	Email	Culture
		■				en-US
	MarketPlace Development	■	AzureSSO			en-US
		■				en-US
		■	AzureSSO			en-US
		■				en-US
		■	AzureSSO			en-US
	TXM Testing	■	AzureSSO			en-US
	Cloud Support	■	AzureSSO			en-US
	Cloud Support	■	AzureSSO			en-US
		■	AzureSSO			en-US
	MarketPlace Development	■	AzureSSO			en-US
	MarketPlace QA	■	AzureSSO			en-US
		■	AzureSSO			en-US
		■	AzureSSO			en-US
		□	AzureSSO			en-US
		□	AzureSSO			en-US
	MKP QA	■	AzureSSO			en-US
	Product Management	■	AzureSSO			en-US
		■				en-US

Manage Grid Items

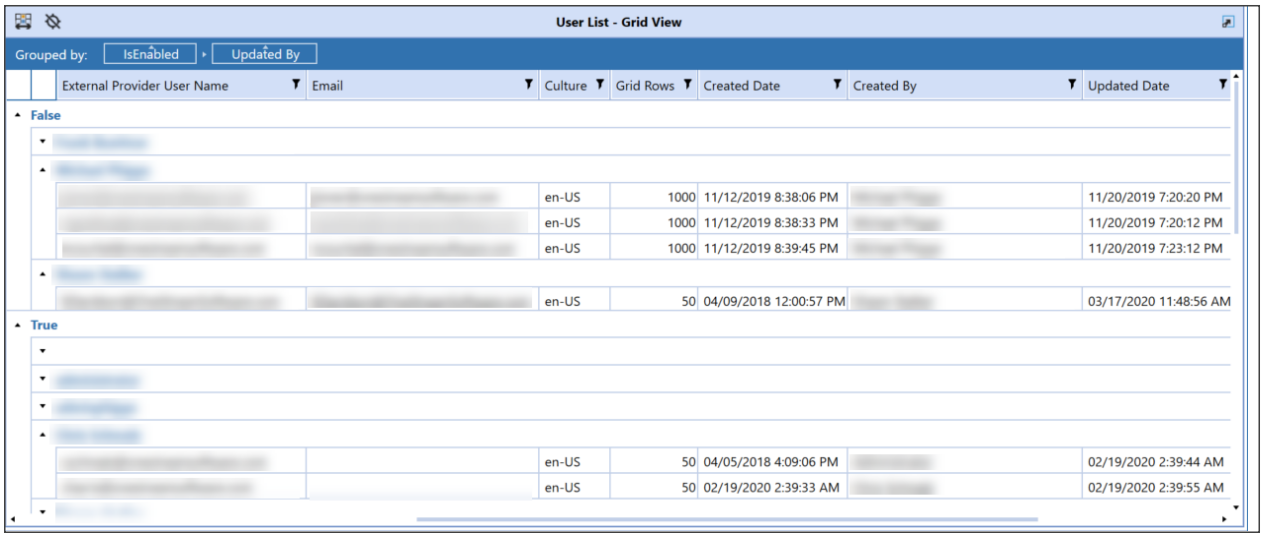
The grid in the User List - Grid View report provides several features that let you group, filter, and display the data, items and columns in the grid.

Group Grid Items

In User List - Grid View report grid, you can drag and drop column headers to the dark blue bar on top of the column headers to group and display grid items by the dropped column.

Any column or combination of columns can be used. For example, to group by the user and whether the user is enabled in the system, first drag the User column head up to the bar at the top of the grid, then do the same with the IsEnabled column head. Dragging and dropping any column head to this area changes it to the Grouped by bar and displays the column head names that you drop into it.

The following image shows the grid in the **User List - Grid View** report with the tasks grouped first by the IsEnabled column value (which returns **False** or **True**), then by the Updated By column value. Grouped list items display in alphabetical order.

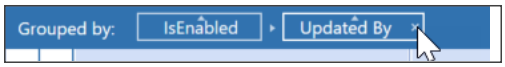


Column groupings are updated and display as soon as the column is dropped into the bar. When more than one grouping is used, groupings display as nested within its higher-level grouping. For example, the previous image lists the users by whether the user is enabled in OneStream, then within each status, users are grouped by the date the user's record was updated.

Expand or collapse grouped items by clicking **Expand** and **Collapse** on the top left of each grouping.

Any column groupings you make are retained between Security Audit Reports sessions. Groupings stay in place until you change them or remove them.

To remove a grouping, hover over the column group you want to remove, then click the x that appears in the group box. You can also click the column group head in the Grouped by bar and drag it anywhere outside of the bar to remove it. Removing all groupings restores the list to its original state.



You can also change the list of items within groupings between ascending order and descending order by clicking the ascending/descending widget on the top of the column group box.

When grouping grid items by multiple groups, you can also easily change grouping hierarchy by dragging and dropping a grouping box to the desired grouping level.

Filter Items that Display in a Grid

Grids allow you to use filters to display a subset of the grid's items. This is useful when working with large numbers of items in a grid and lets you easily focus on the items you need to work with.

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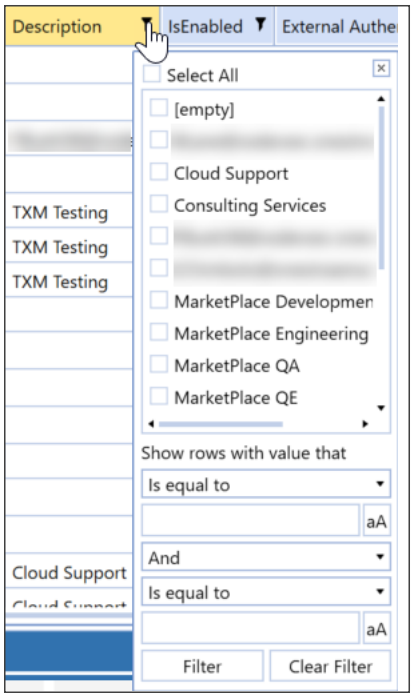
Any grid with columns that include the **Filter** button in the column head let you use filtering criteria to display the items that meet the filtering criteria you define for that column.

In any grid column, you can click the **Filter** button to display the **Filter Criteria** dialog box.



Start by selecting the specific items to include in the filter. Items that you can choose from are based on specific item values available in the selected column. You can select all items, specific items, or a single item for filtering.

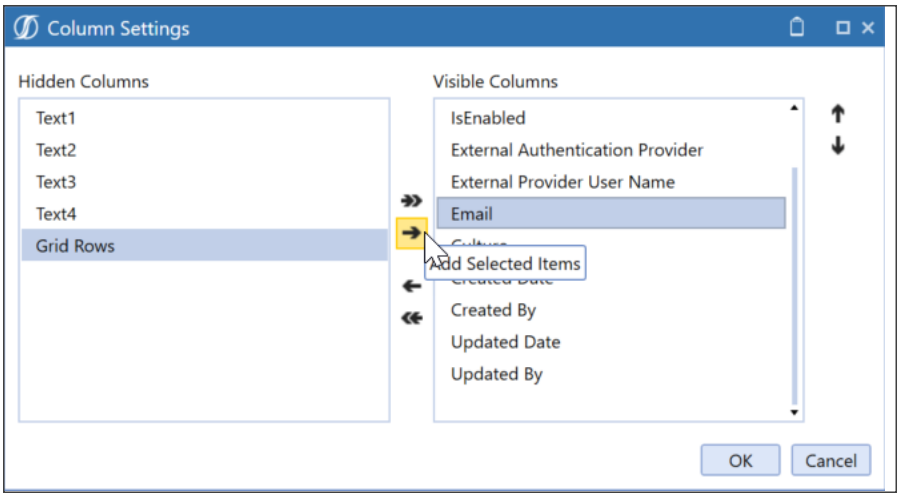
Use the remaining fields to optionally build a filter expression to further filter the items to display in the grid. Use the fields to define the logical operators and relational operators in the filter expression. When a logical operator requires a value, use the text box below the logical operator list box to enter the value. Click the button next to the value if you want case matching to apply to the entered value.

Click **Filter** to apply the filter to the selected task group or task list.

Set and Order Grid Columns

You can click the **Column Settings** button to determine which columns to display and the left-to-right order in which the columns display in the **User List – Grid View** report. This allows you to easily focus on just the data you need to see.

The **Column Settings** dialog box lets you select the columns to display in the **Task Groups** and **Tasks** panes of the **Task Administration** page.



Select columns names in either the **Visible Columns** list or the **Hidden Columns** list and use the left-to-right and right-to-left arrows to move the selected columns names from one list to the other. You can hold down the SHIFT key to select multiple sequential column names, or you can hold down the CTRL key and select multiple non-sequential columns names. Then use the arrows to move the selected column names from one list to the other. Use the **Add All Items** or **Remove All Items** arrows to move all items from one list to the other.

The **Visible Columns** list shows the order in which columns display. To reorder a column in the display, select the heading name from the **Visible Columns** list, then use the **Move Up** and **Move Down** buttons to set where the selected column displays.

See Manage Grid Items.

User Change Audit

The User Change Audit provides details on each change made to user records in within the specified date range. Each change record shows the user record attribute that changed, the attribute's old and new value, the audit user who last updated the user record, along with the time stamp of when the user record was changed. Changes are listed by user.

User Change Audit

Start Date: 2018-08-21
End Date: 2020-08-21

Attribute Changed:	Original Value:	New Value:	Audit User:	Audit Time:
IsEnabled	True	False	[illegible]	2019-01-25 17:55
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
IsEnabled	True	False	[illegible]	2019-01-25 19:13
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
IsEnabled	True	False	[illegible]	2020-06-02 11:25
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
IsEnabled	True	False	[illegible]	2019-02-01 20:52
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
Password			[illegible]	2018-08-27 18:54
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
IsEnabled	True	False	[illegible]	2019-01-25 18:06
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
IsEnabled	True	False	[illegible]	2019-01-25 20:07
Attribute Changed:	**Original Value:**	**New Value:**	**Audit User:**	**Audit Time:**
Culture	fr-FR	en-US	[illegible]	2020-08-26 12:02
Culture	en-US	fr-FR	[illegible]	2020-08-14 15:34

User’s Group Membership

This report lists users and shows information about each of the groups to which each user belongs. For each user, the associated groups display along with an indicator that tells whether the group is an exclusion group. Records that appear in the report are based on the specified date range. You can also use the user name or description, the user’s enabled status, and any of the freeform text fields to further filter user records that appear on the report.

User's Group Membership

Name:
Description:
Enabled: True

Text 1:
Text 2:
Text 3:
Text 4:

Name:	Text 1:	Text 2:	Text 3:	Text 4:
[illegible]				
Group:		Exclusion Group:		
Everyone		False		
Ex Group 1		True		
Ex Group 2		True		
PCM_Admins		False		
XFW_PCM_1 - Process Control Level 1		False		
XFW_PCM_10 - Process Control Level 10		False		
XFW_PCM_11 - Process Control Level 11		False		
XFW_PCM_12 - Process Control Level 12		False		
XFW_PCM_2 - Process Control Level 2		False		
XFW_PCM_3 - Process Control Level 3		False		
XFW_PCM_4 - Process Control Level 4		False		
XFW_PCM_5 - Process Control Level 5		False		
XFW_PCM_6 - Process Control Level 6		False		
XFW_PCM_7 - Process Control Level 7		False		
XFW_PCM_8 - Process Control Level 8		False		
XFW_PCM_9 - Process Control Level 9		False		
[illegible]				
Group:		Exclusion Group:		
Everyone		False		

User’s Group Change Audit

The User’s Group Change Audit provides details on each change to user records that were made within the specified date range. For each user, the report lists each change made to the user’s security groups. Each change shows the change action, the audit user who made the change, along with the time stamp when the user record was changed.

User's Group Change Audit

Start Date: 2018-08-21
End Date: 2020-08-21

Security Group:	Action:	Audit User:	Audit Time:
PCM_Admins	Add		2019-01-08 15:04
XFW_PCM_12 - Process Control Level 12	Add		2019-01-08 15:04
Security Group:	**Action:**	**Audit User:**	**Audit Time:**
RPTA_Admins	Add		2020-03-24 17:00
Security Group:	**Action:**	**Audit User:**	**Audit Time:**
RCM_Users	Add		2018-08-27 18:54
Security Group:	**Action:**	**Audit User:**	**Audit Time:**
Administrators	Add		2019-03-05 19:47
FSK Admin	Add		2019-03-05 15:19
PELIM Admin - Elimination Administrators	Add		2019-03-05 15:18
Security Group:	**Action:**	**Audit User:**	**Audit Time:**
OPS_Admins	Delete		2019-08-23 14:41
HDK_Admins	Add		2019-07-02 13:47
UTM_Admins	Add		2019-06-07 13:44
OPS_Admins	Add		2019-06-07 13:44
PRM_Admins	Add		2019-06-07 13:44
Administrators	Add		2019-06-07 13:44
RCM_Admins	Add		2019-06-07 13:44
ApplicationAdmin	Add		2019-06-07 13:44

User Security Roles

The User Security Roles Report is a simple list of all the security roles assigned to each user. Users display on the report in alphabetical order.

You can also use the user name or description, the user’s enabled status, and any of the free form text fields to further filter user records that appear on the report.

User's Security Roles

Name:
Description:
Enabled: True

Text 1:
Text 2:
Text 3:
Text 4:

Name:

Security Roles:

AdministerApplication	OpenApplication	ModifyData	ViewAllData
CreateAuditAttachments	CreateFootnoteAttachments	CertifyAndLockDescendants	UnlockAndUncertifyAncestors
PreserveImportData	RestoreImportData	UnlockWorkflowUnit	ViewSourceDataAudit
EncryptBusinessRules	ManageApplicationProperties	ManageMetadata	ManageFXRates
LockFXRates	UnlockFXRates	ManageData	ManageCubeViews
ManageDataSources	ManageTransformationRules	ManageConfirmationRules	ManageCertificationQuestions
ManageWorkflowChannels	ManageWorkflowProfiles	ManageJournalTemplates	ManageFormTemplates
ManageApplicationDashboards	ManageApplicationDatabaseFiles	ManageTaskScheduler	TaskScheduler
ApplicationLoadExtractPage	ApplicationPropertiesPage	ApplicationSecurityRolesPage	BookAdminPage
BusinessRulesPage	CertificationQuestionsPage	ClientUpdaterPage	ConfirmationRulesPage
CubeAdminPage	CubeViewsPage	DashboardAdminPage	DataManagementAdminPage
TaskSchedulerPage	DataSourcesPage	DimensionLibraryPage	FxRatesPage
FormTemplatesPage	JournalTemplatesPage	SpreadsheetPage	TextEditor
TimeDimProfilesPage	TransformationRulesPage	WorkflowChannelsPage	WorkflowProfilesPage

Security Roles:

AdministerApplication	OpenApplication	ModifyData	ViewAllData
CreateAuditAttachments	CreateFootnoteAttachments	CertifyAndLockDescendants	UnlockAndUncertifyAncestors
PreserveImportData	RestoreImportData	UnlockWorkflowUnit	ViewSourceDataAudit
EncryptBusinessRules	ManageApplicationProperties	ManageMetadata	ManageFXRates
LockFXRates	UnlockFXRates	ManageData	ManageCubeViews

User Deactivation

The User Deactivation report shows all the enabled users that have not logged into OneStream and are set to expire based on remaining inactivity days from the current date, which displays at the top of the report as the Run Date. The total number of users also displays at the top of the report.

No filters are available for this report. The report displays the deactivation status based on the current date.

Records on the report are ordered by user deactivation date. Users whose deactivation date are 10 or less days from the report run date display first and appear in red. Next are users whose deactivation date is between 10 to 20 days from the report run date. These

appear in orange. Finally, users whose deactivation date is more than 20 days from report run date display in black.

For each user on the report, the name, description and user's email displays, as well as the UTC time stamp of the user's last login, the number of days the user has until deactivation due to inactivity, and the UTC time for the deactivation.

The report does not show the last login time stamp for users that are enabled but have never logged in. If a user's status settings are not defined in OneStream (System|Security|Users|Status) which are set in the server configurations, no data appears on the report.

User Deactivation

Run Date: 9/9/2020 2:28:32 PM
Total Users: 78

Name	Description	Email	Last Logon Time (UTC)	Remaining Inactivity Days	Deactivation Date (UTC)
[illegible]	[illegible]	[illegible]	8/18/2020 1:50:41 PM	8	8/26/2020 1:18:42 PM
[illegible]	[illegible]	[illegible]	8/18/2020 1:50:41 PM	8	8/26/2020 1:18:42 PM
[illegible]	[illegible]	[illegible]	8/18/2020 1:50:41 PM	8	8/26/2020 1:18:42 PM
[illegible]	[illegible]	[illegible]	8/18/2020 1:50:41 PM	8	8/26/2020 1:18:42 PM
[illegible]	[illegible]	[illegible]	8/18/2020 1:50:41 PM	8	8/26/2020 1:50:41 PM
[illegible]			8/26/2020 7:23:21 PM	16	9/11/2020 7:23:21 PM
[illegible]	[illegible]	[illegible]		22	9/23/2020 8:09:16 PM
[illegible]	[illegible]	[illegible]	9/2/2020 2:34:06 PM	23	9/25/2020 2:34:06 PM
[illegible]	[illegible]	[illegible]	9/2/2020 5:38:46 PM	23	9/25/2020 5:38:46 PM
[illegible]	[illegible]	[illegible]	9/2/2020 7:46:30 PM	23	9/25/2020 7:46:30 PM
[illegible]			8/28/2020 1:30:00 AM	24	9/21/2020 1:30:00 AM
[illegible]			8/29/2020 1:30:00 AM	24	9/22/2020 1:30:00 AM

Group Reports

> **NOTE:** Sensitive data in reports graphics shown in this section has been blurred for data protection.

See User and Group Report Filters for information on applying filters to reports.

Data shown on Group reports is defined in OneStream (**System > Security > Groups**) when setting up system security roles.

Total Groups

This report lists critical status information for each group defined in OneStream. Each group record created within the start date/end date range displays in the report. Groups display in alphabetical order by name. Each group listed in the report shows the timestamp when the group was created and the timestamp of the last update to that group.

The IsExclusion field indicates whether the group is an exclusion group. Exclusion groups are used in OneStream to exclude a group of people from access to a group. See *System Administration* in the *Design and Reference Guide* for more information.

The report also lists the total number of users currently shown on the report.

Total Groups

Total Groups: 34

Name:	Is Exclusion:	Date Created:	Last Updated Date:
Administrators	False	2019-03-05 19:46	2019-03-05 19:47
ApplicationAdmin	False	2018-04-09 12:05	2018-04-09 12:05
Clubs Controllers	False	2020-07-17 14:15	2020-07-17 14:15
Ex Group 1	True	2020-05-11 20:12	2020-05-11 20:12
Ex Group 2	True	2020-05-11 20:12	2020-05-11 20:12
FSK Admin	False	2019-03-04 19:10	2019-03-05 15:19
HDK_Admins	False	2019-06-27 15:24	2019-07-02 13:47
MST_Admins	False	2019-06-13 18:18	2019-06-13 18:18
newprmgroup2	False	2018-08-03 19:48	2018-08-03 19:48
OPS_Admins	False	2019-01-25 13:28	2019-08-23 14:41
PCM_Admins	False	2019-01-08 15:04	2019-01-08 15:04
PELIM Admin - Elimination Administrators	False	2019-03-04 19:09	2020-05-11 17:06
PRM_Admins	False	2018-07-31 16:49	2018-07-31 18:56
RCM_Admins	False	2018-08-14 19:39	2018-08-27 14:36
RCM_Users	False	2018-08-14 19:39	2018-08-27 14:28
RCM_ViewOnly	False	2019-02-05 18:02	2019-02-05 18:02
RPTA_Admins	False	2020-03-24 16:59	2020-03-24 16:59
SAR_Users	False	2020-08-27 17:20	2020-08-27 17:20

Added Groups

This report lists the groups that were added within a specified date range. Groups display in alphabetical order by name. The total number of groups added within the date range displays at the top of the report for quick reference, along with the specified report date range. Each group record on the report also shows the timestamp when the group was created and the time stamp of when the user record was last updated.

The IsExclusion field indicates whether the group is an exclusion group. Exclusion groups are used in OneStream to exclude a group of people from access to a group. See *System Administration* in the *Design and Reference Guide* for more information on Exclusion Groups.

Added Groups

Start Date: 2019-09-08
End Date: 2020-09-08
Total Added Groups: 37

Name:	Is Exclusion:	Date Created:	Last Updated Date:
[illegible]	False	2019-03-05 19:46	2019-03-05 19:47
[illegible]	False	2018-04-09 12:05	2018-04-09 12:05
[illegible]	False	2020-07-17 14:15	2020-07-17 14:15
[illegible]	True	2020-05-11 20:12	2020-05-11 20:12
[illegible]	True	2020-05-11 20:12	2020-05-11 20:12
[illegible]	False	2019-03-04 19:10	2019-03-05 15:19
[illegible]	False	2019-06-27 15:24	2019-07-02 13:47
[illegible]	False	2019-06-13 18:18	2019-06-13 18:18
[illegible]	False	2018-08-03 15:01	2018-08-03 15:01
[illegible]	False	2018-08-03 15:09	2018-08-03 15:10
[illegible]	False	2018-08-03 19:48	2018-08-03 19:48
[illegible]	False	2019-01-25 13:28	2019-08-23 14:41

Deleted Groups

This report lists all users in OneStream who have been deleted within the specified date range. The specified date ranges display at the top of the report along with the total number of groups that were deleted during that date range for quick reference. For each deleted group, the report shows the audit user along with the audit time stamp.

The IsExclusion field indicates whether the group is an exclusion group. Exclusion groups are used in OneStream to exclude a group of people from access to a group. See *System Administration* in the *Design and Reference Guide* for more information on Exclusion Groups.

Deleted Groups

Start Date: 2019-09-08
End Date: 2020-09-08
Total Deleted Groups: 3

Name:	Is Exclusion:	Audit User:	Audit Time:
New	False	[illegible]	2018-08-03 15:01
New	False	[illegible]	2018-08-03 15:10
TXM_Admin	False	[illegible]	2019-10-08 20:06

Updated Groups

This report lists the groups whose information was updated within a specified date range. The total number of groups updated within the date range displays at the top of the report for quick reference, along with the specified report date range. Each updated group shown on the report also shows the audit user who last updated the group, along with the time stamp of when the group was updated.

The IsExclusion field indicates whether the group is an exclusion group. Exclusion groups are used in OneStream to exclude a group of people from access to a group. See *System Administration* in the *Design and Reference Guide* for more information on Exclusion Groups.

Updated Groups

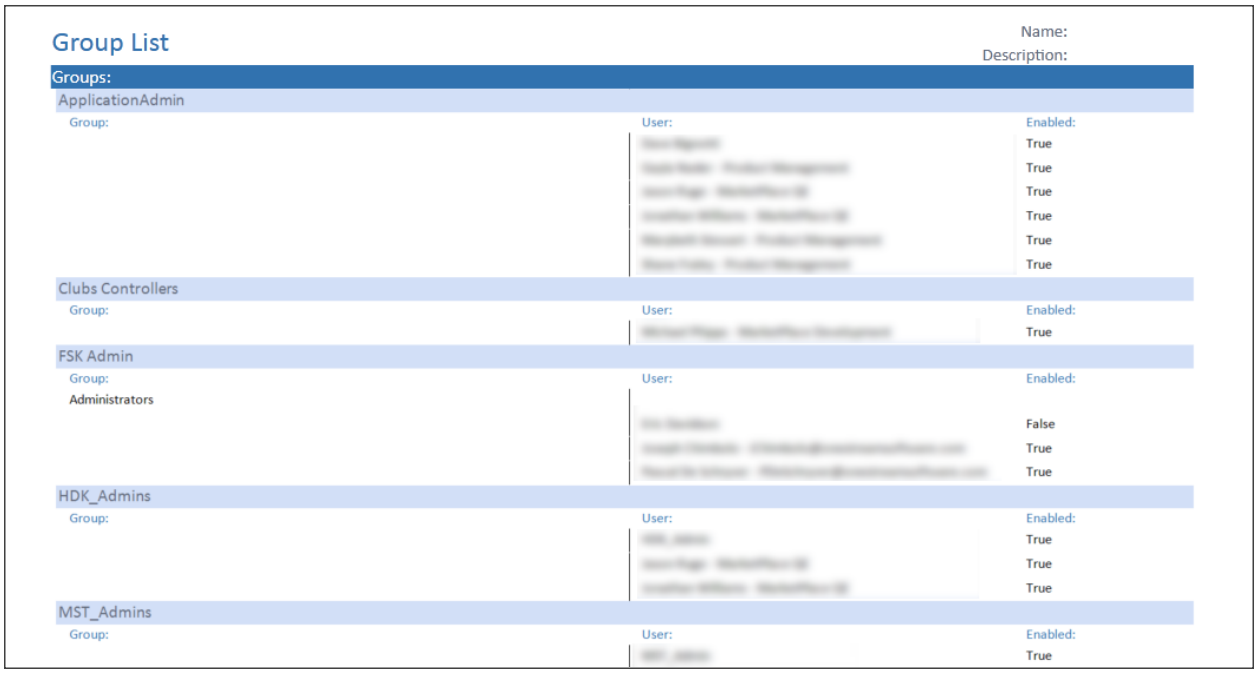
Start Date: 2019-09-08
End Date: 2020-09-08
Total Updated Groups: 21

XFW_PCM_3 - Process Control Level 3	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2019-01-07 16:56
Administrators	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2019-03-05 19:47
XFW_PCM_11 - Process Control Level 11	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2019-01-07 16:56
New	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2018-08-03 15:09
XFW_PCM_5 - Process Control Level 5	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2019-01-07 16:56
Clubs Controllers	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2020-07-17 14:15
RCM_Users	Is Exclusion:	Audit User:	Audit Time:
	False	[illegible]	2018-08-27 14:27
	False	[illegible]	2018-08-27 14:27
	False	[illegible]	2018-08-27 14:28

Group List

This report lists critical status information for each group and exclusion group defined in OneStream. Each group created within the start date/end date range displays in the report. Records display in alphabetical order by group name. For each group defined in OneStream, the report shows the group's children, any users belonging to the group, and whether the group is enabled.

You can further filter the groups that display in the report by the group name or description



Group List

Name:
Description:

Groups:		
ApplicationAdmin		
Group:	User:	Enabled:
	[illegible]	True
	[illegible]	True
	[illegible]	True
	[illegible]	True
	[illegible]	True
	[illegible]	True
Clubs Controllers		
Group:	User:	Enabled:
	[illegible]	True
FSK Admin		
Group:	User:	Enabled:
Administrators		
	[illegible]	False
	[illegible]	True
	[illegible]	True
HDK_Admins		
Group:	User:	Enabled:
	[illegible]	True
	[illegible]	True
	[illegible]	True
MST_Admins		
Group:	User:	Enabled:
	[illegible]	True

Group Change Audit

The Group Change Audit report provides details on each change to group records in OneStream that were made within the specified date range. The specified report date range displays at the top of the report for quick reference. For each group listed in the report, the action performed on the group displays with the audit user who made the change, along with the time stamp of when the user record was changed.

Group Change Audit

Start Date: 2019-09-08
End Date: 2020-09-08

XFW_PCM_3

Action:	Member:	Is User:	Audit User:	Audit Time:
Added		True		2019-01-08 15:03
Added		False		2019-01-07 16:56

Administrators

Action:	Member:	Is User:	Audit User:	Audit Time:
Added		True		2020-09-01 20:10
Added		True		2020-09-01 20:09
Added		True		2020-09-01 20:09
Added		True		2020-08-31 17:00
Added		True		2020-08-25 19:48
Deleted		True		2020-08-25 19:48
Added		True		2020-08-07 13:26

Help & Miscellaneous Information

This page contains additional solution documentation for Security Audit Reports, including database migration information.

Display Settings

OneStream 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: SAR_PV6.2.0_SV101_PackageContents.zip

Identifier	Description
SAR	Solution ID
PV6.2.0	Minimum Platform version required to run solution

Identifier	Description
SV101	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.