onestream

SAP Connector Guide

PV8.0.0 SV200

Table of Contents

Solution Overview

OneStream SAP Connector is a OneStream Solution designed to reduce integration time and enable implementation without specialized coding knowledge. This solution enables you to do the following:

- Create and test the RFC connection to the SAP environment.
- Connect to SAP through a Web API.
- Use Smart Integration Connector to connect to a Web API when a firewall is present.
- Generate a OneStream connector rule without writing any code.
- Preview the data in a DataGrid.
- Create Web API Endpoint Connectors with a step-by-step guide.
- Use substitution variables while creating Web API Endpoint Connectors.

Setup and Installation

This section contains important details related to the planning, configuring, and installation of your solution. Before you install the solution, familiarize yourself with these details.

See OneStream Solution Modification Considerations.

Dependencies

Component	Description
OneStream 8.0.0 or later	Minimum OneStream Platform version required to install this version of SAP Connector.
OneStream Smart Integration Connector enabled if environment is SAAS	For RFC Connections, Smart Integration is required to connect an SAP data source that is on a private network and not public facing / exposed to the public internet. For Web API connections, Smart Integration Connector is optional if the APIs are publicly available over the internet.

Smart Integration Connector

Before using the SAP Connector, if you need to use the Smart Integration Connector, you must:

- Set up Smart Integration Connector. See "Setup and Installation" in the *Smart Integration Connector Guide*.
- Verify that the Smart Integration Connector can communicate outbound over port to 443. See "Whitelist the Azure Relay to your Firewall" in the *Smart Integration Connector Guide*.

DLL Setup for RFC Connections

Below is an example of how to set up the necessary DLLs for ERPConnect. These DLLs are needed for the RFC Connection type within the connector.

Place the following DLLs in the Referenced Assemblies folder set in the Smart Integration Connector Gateway configuration:

- ERPConnectStandard20.dll

  > **NOTE:** See Solution Exchange to download.

- sapnwrfc.dll
- icuucXX.dll
- icudtXX.dll
- icuinXX.dll

  > **NOTE:** XX in the DLL file name will vary on the version of the NetWeaver Remote Function Call Software Development Kit.

See "Support for DLL Migration" and "Support for ERPConnect (SAP)" in the *Smart Integration Connector Guide*.

Web API Using Smart Integration Connector

A Smart Integration Connector direct connection is required to use the Web APIs with Smart Integration Connector. See "Create a Direct Connection Gateway" in the *Smart Integration Connector Guide*.

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

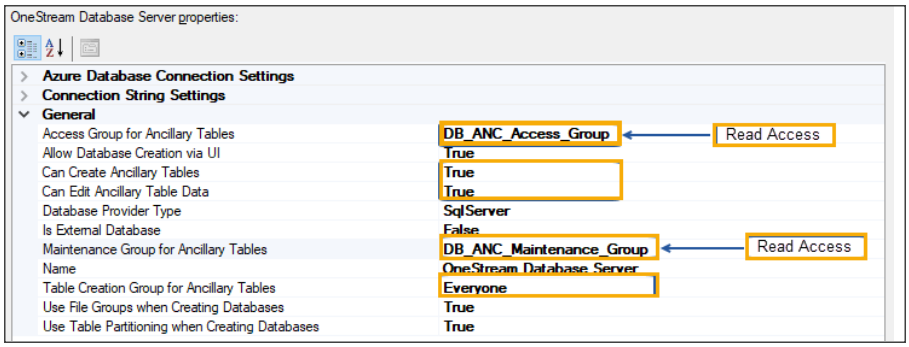
Ensure that the security group settings include the users who will be working on and setting up SAP Connector before proceeding.

> **NOTE:** Group settings are applicable to all OneStream Solutions, so 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 who will edit and maintain tables.

- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.



4. Restart Internet Information Server.

Install SAP Connector

1. In OneStream Solution Exchange, go to **OneStream Solutions** and click the **SAP Connector** tile.
2. On the **SAP Connector** page, in the **Platform Version** drop-down list, select the appropriate OneStream Platform version.
3. In the **Solution Version** drop-down list, select the most recent version. Click **Download**.
4. Log into OneStream.
5. On the **Application** tab, go to **Tools** > **Load/Extract**.
6. On the **Load** tab, use the **Select File** icons to locate the solution package. Click **Open**.
7. When the solution file name appears, click **Load**.
8. Click **Close** to complete the installation.

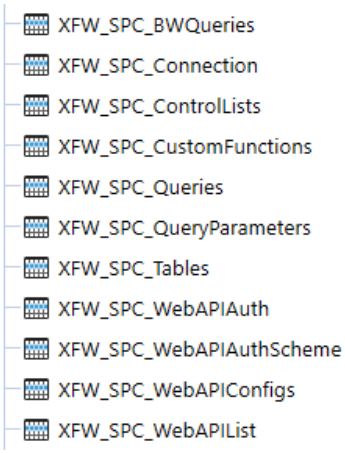
Set Up SAP Connector

The first time SAP Connector is run, you are guided through SAP Connector Setup screen.

- On the **Community Solution** tab, select **SAP Connector** from the SAP Connector profile.

Create Tables

1. Click **Step 1: Create Tables** to create all the tables required for SAP Connector.



2. After setup is complete, click **Step 2: Launch Solution**. After the setup has been run, the next time the SAP Connector link is clicked it will take you to the SAP Connector viewer.

Package Contents

The Dashboard Maintenance Unit provides the user interface for SAP Connector and includes the required dashboard groups, components, data adapters, parameters and

files.

Business Rules

The following business rules are included:

- SPC_IntegrationHelper

Settings

The **Settings** page contains the **Global Options** tab in which key properties that guide administration are set as well as **Uninstall** options.

Global Options

Use the **Global Options** page to set key properties that guide global SAP Connector.

Security Role [Manage Solution]

Determines which security groups can manage the solution.

Theobald Table Extract Function Name

Custom function module installed on the target SAP instance that extracts data from tables. See Tables on ERPConnect Help Center.

SIC Gateway Execution Timeout Limit (Sec)

Enter a whole number to set the timeout limit for the SIC gateway in seconds. This determines how long a query will run before it hits the timeout limit.

Uninstall

Use the Uninstall feature to remove the SAP Connector User Interface or the entire solution. If part of an upgrade, any modifications performed on standard SAP Connector objects are removed. These are the uninstall options:

- **Uninstall UI** removes SAP Connector, including related dashboards and business rules, but retains the database and related tables. For some releases, perform this step before accepting a new solution version as some of the dashboards or other objects may have changed. Choose this option to update SAP Connector without removing the data tables. The Release Notes indicate if an overinstall is supported.
- **Uninstall Full** removes all related data tables, data, and SAP Connector dashboards and business rules. Choose this option to completely remove SAP Connector or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

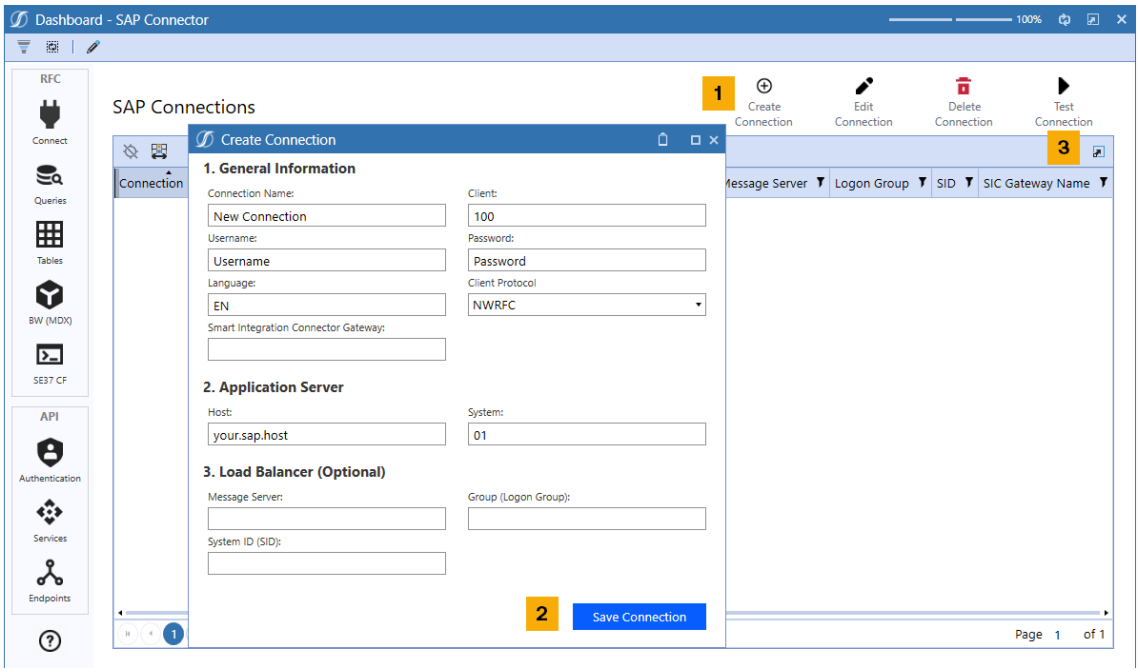
> **CAUTION:** Uninstall procedures are irreversible.

Create RFC Connections

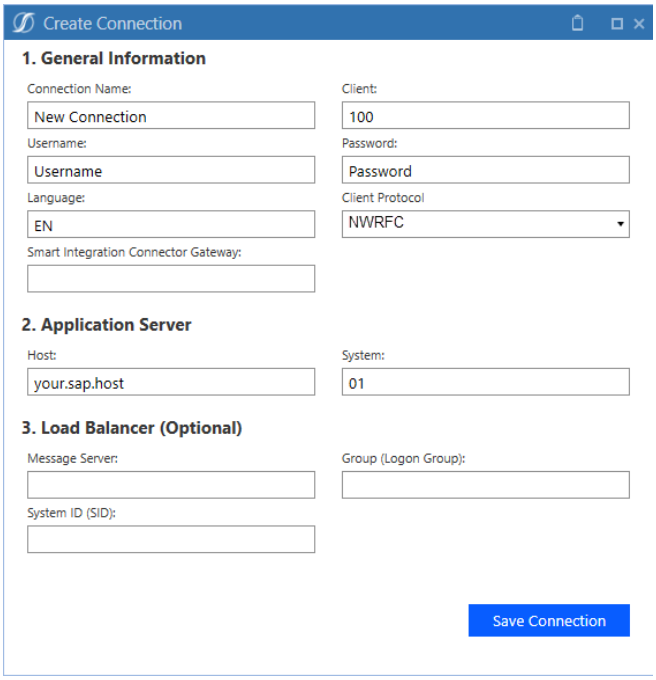
Set up RFC connections for use with Query, Table, BW Query, and SE37 Connectors.

Create Connection

To set up a new RFC connection to your SAP environment, follow these steps:



1. Click the **Create Connection** icon.
2. Populate the **Create Connection** dialog box.



- **Connection Name**: Name chosen by Administrator
- **Username**: SAP username
- **Language**: Preferred language
- **Smart Integration Connector Gateway**: Set up cloud servicer
- **Client**: Number corresponding to the SAP client number
- **Password**: SAP Password
- **Client Protocol**: RFC or NWRFC used to connect to SAP instance
- **Host**: Your SAP host
- **System**: Client System number
- **Message Server (optional)**: Message servicer

- **Group (optional)**: Group Logon
- **System ID (SID) (optional)**: System ID

3. Click the **Save Connection** button.
4. To verify if the connection was successful, select the connection and click the **Test Connection** icon.

Edit Connection

To edit a connection, follow these steps:

1. Select a connection from the list.
2. Click the **Edit Connection** icon.

3. Modify the information in the **Edit Connection** dialog box. See Create Connection to review connection fields.
4. Click the **Save Connection** button.
5. To verify successful connection, select the connection and then click the **Test Connection** icon.

Create Connecters

After an RFC connection is established, create a connector using these steps:

1. Select the type of connector to create:

   Queries: Executes queries that can be created by the SAP transactions **SQ02** and **SQ01**.

   Tables: Reads SAP tables to display.

   BW (MDX): Executes MDX Query.

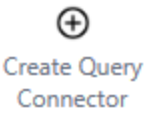
   SE37 CF: Executes function modules.

2. Click an icon to create the respective query.
3. Click the **Create Connector** button. Each page has a unique **Create Connector** button labeled accordingly.

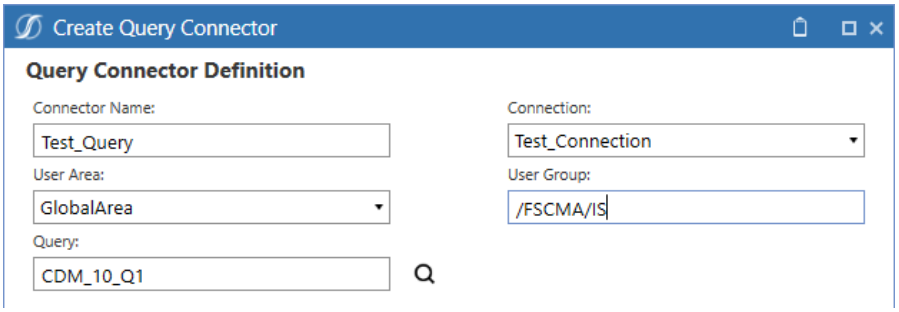
Example Queries Connector

RFC Queries are used to perform predefined functions in SAP systems. This example walks through how to create a Queries Connector.

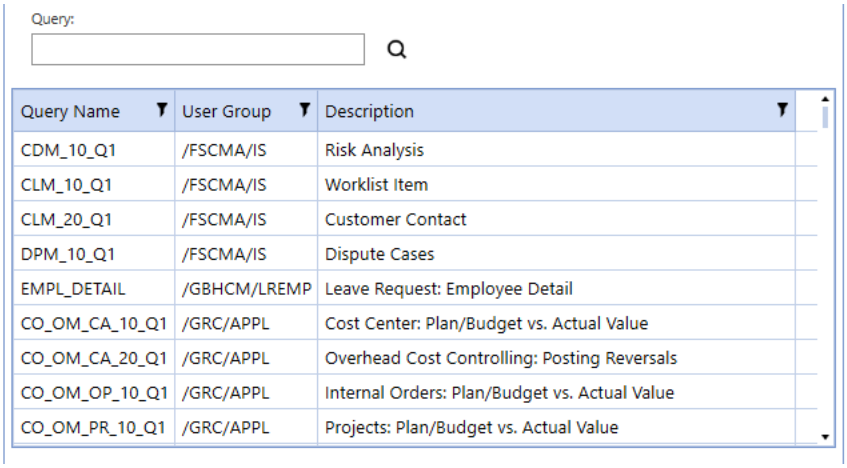
1. Click the **Queries** icon.
2. Click the **Create Query Connector** icon.

3. In the **Create Query Connector** dialog box, populate the following fields:

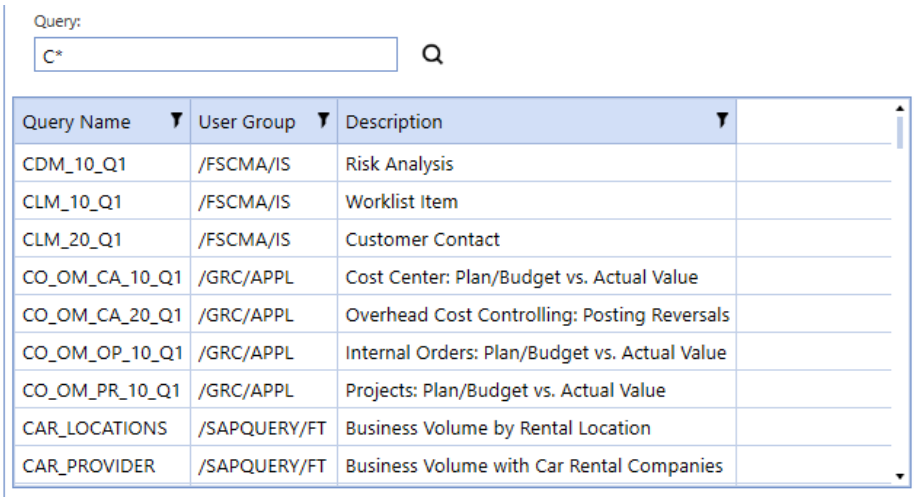


- **Connector Name**: Preferred Name for the Connector.
- **User Area**: Select **GlobalArea** or **StandardArea**.
    - **GlobalArea**: The query objects of the global areas are cross-client objects.
    - **StandardArea**: All query objects are created and managed specifically for each client.
- **Query**: Enter the name of the query to connect to. If you are unsure, locate a query using one of the below options:
    - **Search Icon**: Use the search icon to open a grid of all available queries. Select any query from the grid to populate the Query field.



Query Name	User Group	Description
CDM_10_Q1	/FSCMA/IS	Risk Analysis
CLM_10_Q1	/FSCMA/IS	Worklist Item
CLM_20_Q1	/FSCMA/IS	Customer Contact
DPM_10_Q1	/FSCMA/IS	Dispute Cases
EMPL_DETAIL	/GBHCM/LREMP	Leave Request: Employee Detail
CO_OM_CA_10_Q1	/GRC/APPL	Cost Center: Plan/Budget vs. Actual Value
CO_OM_CA_20_Q1	/GRC/APPL	Overhead Cost Controlling: Posting Reversals
CO_OM_OP_10_Q1	/GRC/APPL	Internal Orders: Plan/Budget vs. Actual Value
CO_OM_PR_10_Q1	/GRC/APPL	Projects: Plan/Budget vs. Actual Value

- **Search with Wildcard**: Locate a query using * as a wildcard and click the search icon. For example C* would pull the following results:



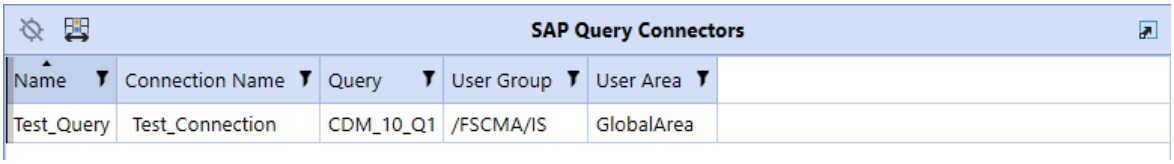
Query Name	User Group	Description
CDM_10_Q1	/FSCMA/IS	Risk Analysis
CLM_10_Q1	/FSCMA/IS	Worklist Item
CLM_20_Q1	/FSCMA/IS	Customer Contact
CO_OM_CA_10_Q1	/GRC/APPL	Cost Center: Plan/Budget vs. Actual Value
CO_OM_CA_20_Q1	/GRC/APPL	Overhead Cost Controlling: Posting Reversals
CO_OM_OP_10_Q1	/GRC/APPL	Internal Orders: Plan/Budget vs. Actual Value
CO_OM_PR_10_Q1	/GRC/APPL	Projects: Plan/Budget vs. Actual Value
CAR_LOCATIONS	/SAPQUERY/FT	Business Volume by Rental Location
CAR_PROVIDER	/SAPQUERY/FT	Business Volume with Car Rental Companies

> **NOTE:** Connection and User Area fields must be populated to search for a query.

- **Connection**: Use the drop-down menu to select the RFC Connection to use for the query.

- **User Group**: Enter the name of user group the query is assigned to.

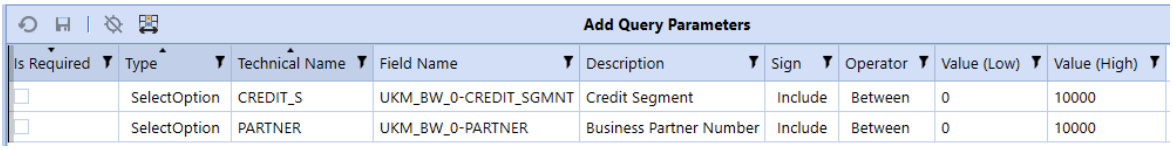
4. Click the **Save Connector** button. When saved, the connector displays in the table.



SAP Query Connectors

Name	Connection Name	Query	User Group	User Area
Test_Query	Test_Connection	CDM_10_Q1	/FSCMA/IS	GlobalArea

5. Select the Query to view specific parameters that the query expects to operate. In this example, the parameters include Sign, Operator, Value (Low), and Value (High).



Add Query Parameters

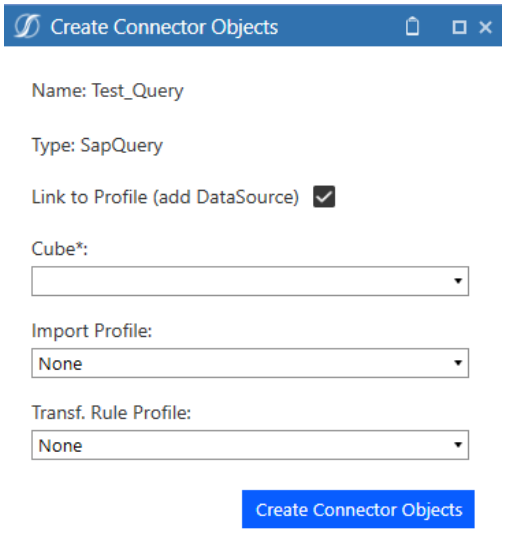
Is Required	Type	Technical Name	Field Name	Description	Sign	Operator	Value (Low)	Value (High)
☐	SelectOption	CREDIT_S	UKM_BW_0-CREDIT_SGMNT	Credit Segment	Include	Between	0	10000
☐	SelectOption	PARTNER	UKM_BW_0-PARTNER	Business Partner Number	Include	Between	0	10000

6. After the parameters are entered, click the **Preview Query Connector** icon to view all columns for the query connector. There is no row limit on the preview for query connectors.

7. When you are satisfied with the data the connector is pulling, click the **Create Connector Objects** icon to write the business rule.

> **NOTE:** The business rule is created from a template and the given template adapts based on what type of connector that is being generated in SPC.

8. In the **Create Connector Objects** dialog box, if you select **Link to Profile (add DataSource)**, it will create a data source, which prompts you to select a cube. The Import and Transformation Rule Profile fields are both optional.



9. When done, click the **Create Connector Objects** button to complete the creation of the business rule.

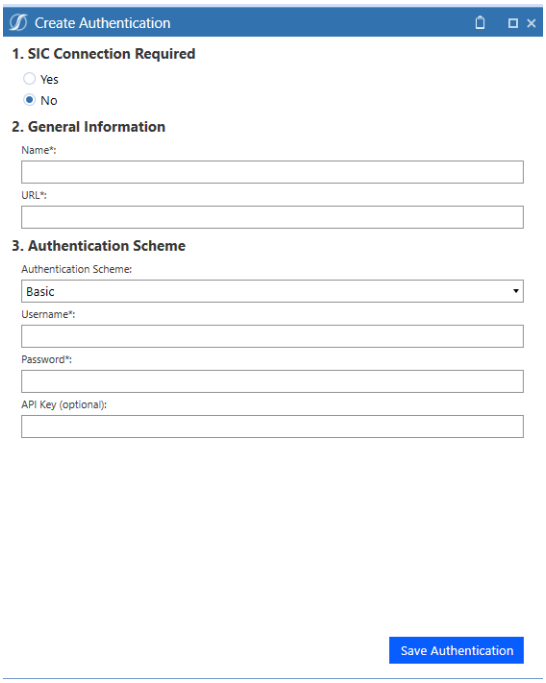
Create Web API Connections

Set up a Web API authentication and create Web API Endpoint connectors.

Web API Authentication

To connect with your SAP system, credentials will need to be provided to the SAP Connector depending on the type of SAP landscape and whether the system you are integrating with is accessible from the internet or behind a company firewall.

Creating a New Authentication



To create a new authentication, follow these steps:

1. Click the **Authentication** page. The Web API Authentication table displays any existing authentications.
2. Click **Create Authentication** to create a new connection.
3. In the **Create Authentication** dialog box, you will be asked if a SIC connection is required:
    - Choose **Yes** and you will then be prompted to enter a Name, the SIC Connection Name, and Service Path.
    - Choose **No** and you will be prompted to enter a Name and URL. This is the default selection when creating a new authentication.

> **NOTE:** For both Yes and No selections, only the Name field is required. However, leaving the other fields blank will prompt a warning.

Authentication Scheme

In the **Authentication Scheme** field, choose **Basic**, **OAuth 2.0**, or **API Key**.

- Choose **Basic** and the Username and Password fields will populate, both of which are required.This is the default selection when creating a new authentication.
- Choose **OAuth2.0** and the following fields will populate. All fields are required:
    - **Token Provider URL**: URL to token provider required to make access token requests
    - **Grant Type**: OAuth Grant Type.

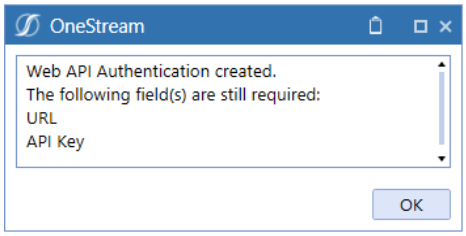
      > **NOTE:** Currently the only supported Grant Type is "client_ credentials".

- **Client ID**: Unique identifier that identifies an application to the OAuth server
- **Client Secret**: Shared secret that authenticates an OAuth application to an authorization server
- **Scope**(optional): One or more scopes to request access to. For example, /.default.

- Choose **API Key** and the required API Key field will populate. When choosing Basic or OAuth2.0 authentication schemes, an optional API Key field will be included.

Required Fields Note

- Naming your authentication is required. If saved without a name, you will be prompted to enter one.
- Authentications can be saved with only a name. However a dialog box will display indicating which required fields are missing.



- To establish a working connection, all required fields must first be filled out.
- When on the Endpoints page, selecting an Authentication Name that has been saved without all the required fields populated will generate an error indicating the authentication was not successful. It also indicates which required fields are still missing. You will not be able to progress beyond this step until the required fields have been filled out.

Web API Services

Before creating a Web API Endpoint Connector, you must first define the OData services you want to connect with in the SAP Connector. The OData V2 services can be found here.

1. Click the **Services** icon to create a new entry in the **Web Service List** table.
2. Populate the following fields:
    a. **Name**: Insert any unique name.
    b. **Service**: The technical name of the OData service in your SAP system, contact your SAP administrator.
3. After adding one or more entries click the **Save** icon.

When creating Web API Endpoint Connectors, these entries will be available in the API Name drop-down list.

Web API Endpoints

The Endpoints page displays the SAP Web API Endpoints table, which lists all existing endpoint connectors. Click the name of a connector to view editable details and make changes using the dynamic sidebar.

Create a New Endpoint Connector

1. Click the **Create Endpoint Connector** button. This will generate a dynamic right-pane sidebar.
2. Create, Copy, Delete, Preview, and Create Connector Objects buttons will be grayed out and disabled during this process.

Copy an Endpoint Connector

1. Select an existing endpoint connector from the table.
2. Click **Copy Endpoint Connector**. A pop-up will generate and ask for a new endpoint connector name to be entered.
3. Click **Save** and a new table item containing the same dynamic sidebar details will be created. Click **Cancel** to close the pop-up and no new endpoint connector will be created.

Delete an Endpoint Connector

1. Select an existing endpoint connector from the table.
2. Click **Delete Endpoint Connector** and a confirmation pop-up will generate.
3. Click **Confirm** to delete the endpoint connector. Click **Cancel** to close the pop-up and the endpoint connector will remain on the table.

Preview an Endpoint Connector

1. Select an existing endpoint connector from the table.
2. Click **Preview Endpoint Connector** to populate a data preview containing:

a. Total number of entries
b. All data columns in alphabetical order
c. 50 rows

Create Connector Objects

Create Connector Objects creates or updates a Connector Business Rule and, optionally, a Data Source for the selected connector.

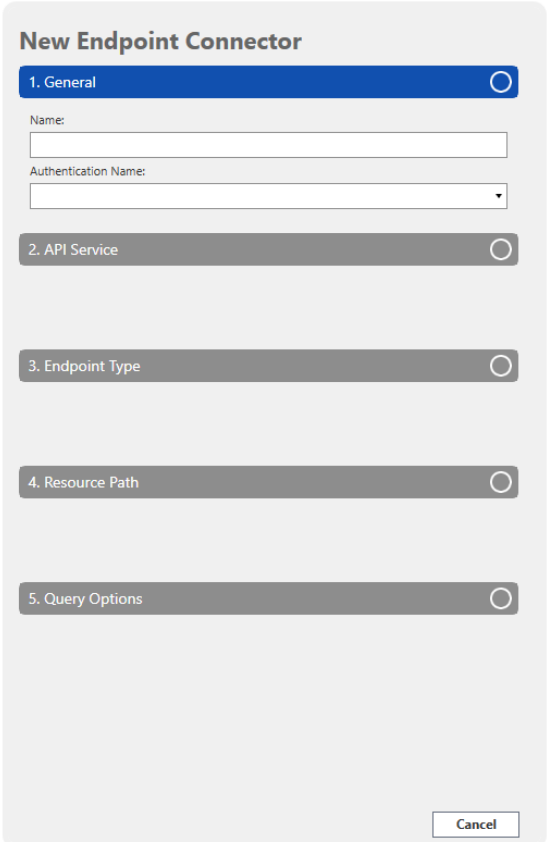
If the **Link To Profile (add DataSource)** box is unchecked:

- Only the Connector Business Rule will be created or updated.

If the Link to Profile **(add DataSource)** box is checked:

- The Connector Business Rule and a Data Source will be created or updated.
  - **Cube**: The cube name for the newly created Data Source
  - **Import Profile** (Optional): Assigns the newly created Data Source to the selected Import Workflow Profile
  - **Transformation Rule Profile** (Optional): Assigns the selected Transformation Rule Profile to the selected Import Workflow Profile

Dynamic Sidebar



The dynamic sidebar is a component that appears after selecting an existing endpoint connector from the table or clicking **Create Endpoint Connector**. It guides you through the steps required to establish a successful endpoint connector and helps in understanding the S/4HANA Cloud API Reference Options.

1. General
    a. **Name**: Enter the name of your new endpoint connector.
    b. **Authentication Name**: Select from a drop-down menu. Options vary depending on the authentication created in the Authentication pane.
2. Service
    a. **API Name**: Select from a drop-down menu. Options vary depending on the selected Authentication.
3. Entity Type
    a. **Entity Type**: Select from a drop-down menu. Options vary depending on the selected API.
4. Resource Path
    a. **Resource Path**: Select from a drop-down menu. Options vary depending on the selected entity type.
5. Query Options (fields determined by previous dynamic selections)
    a. **Set Select Values**:Generates a pop-up showing all available values in the left pane. Select one or more values and click the single arrow to move it to the Selected pane. To move all values to the Selected pane, click the double arrow. The same functionality applies to moving values from the Selected pane to the Available pane. Click **Save** to keep the changes and close the pop-up. Clicking **Cancel** will close the pop-up without saving any changes.
    b. **OneStream Parameter**: When the connection has a date parameter, you have the option to use a OneStream parameter, known as a substitution variable.

i. Select **Yes** to enable utilization of substitution variables in the text boxes.

> **NOTE:** The connection will save even if the date format in the parameter is not valid, but you will see an error asking you to resolve the format to YYYY-MM-DD format.

ii. Select **No**, the default, to set the **Posting Date From** and **Posting Date To** fields using the integrated date picker.

c. **Filter**: May be required, as indicated by an asterisk.

d. **Set Order By Values**: Generates a pop-up showing all available values in the left pane. Select one or more values and click the single arrow to move it to the Selected pane. To move all values to the Selected pane, click the double arrow. The same functionality applies to moving values from the Selected pane to the Available pane. Click **Save** to keep the changes and close the pop-up. Clicking **Cancel** will close the pop-up without saving any changes.

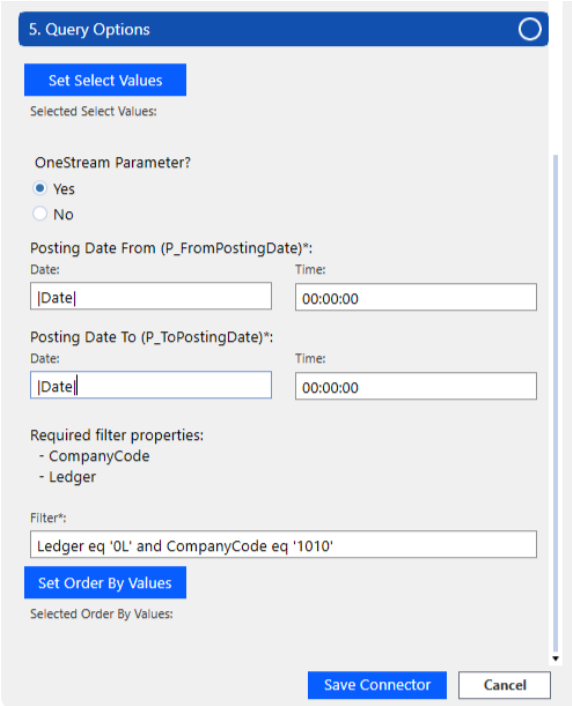
e. **Miscellaneous Parameters**(may be included): May include values such as Company Code or Fiscal Year, depending on previous selections.

The active step header will be filled in blue while unfulfilled step headers remain gray. Once a step is completed, the header will turn green.

Click the **Save Connector** button to save the endpoint connector and it will become a line item on the SAP Web API Endpoints table. If there are unsaved changes and the **Cancel** button is selected, you will be asked to confirm the cancellation. Click **Confirm** to close the sidebar. If Cancel is selected with no unsaved changes made, the sidebar will close without a confirmation pop-up.

Use Substitution Variables in Web API

While creating a new connection or editing an existing connection, you can use substitution variables in the Query Options tab to utilize dynamic values. Type your substitution variable syntax into the Filter text box using values that include parameters within OneStream. For example, |WFYear| or |!CustomParam!|. Save your connection and use the **Preview Connection** button to see your substitution variables applied.



> **NOTE:** When creating a new connection or editing with unsaved chances, the buttons will be grayed out and disabled. When viewing a connection without unsaved changes, the buttons will remain enabled.

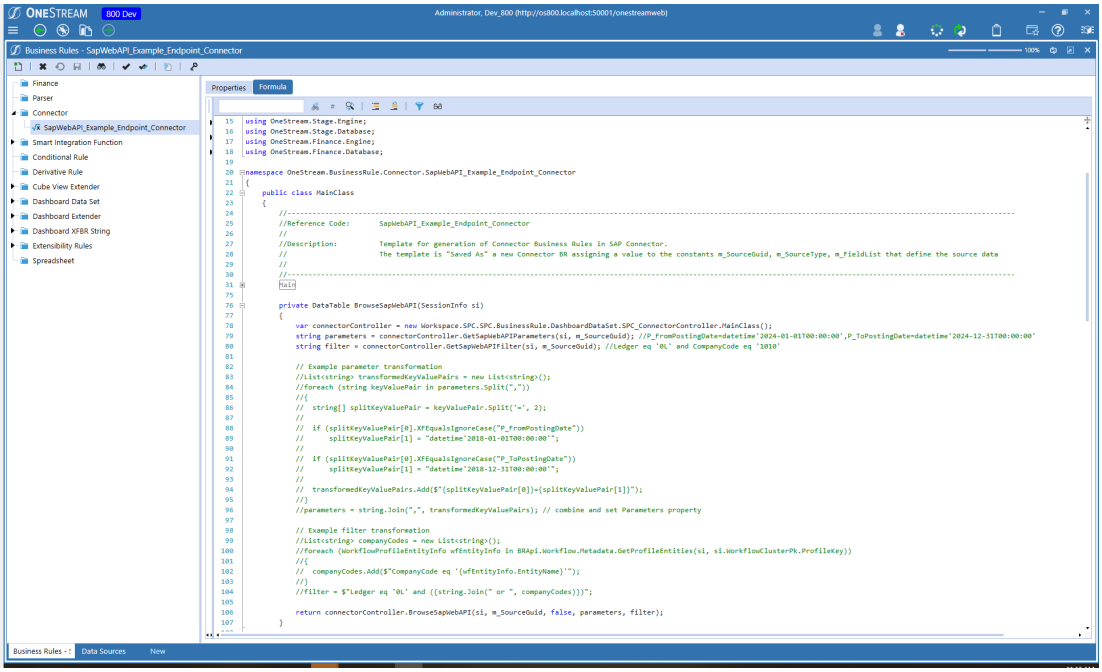
Connector Business Rule

In the generated Connector Business rule for your Endpoint Connector, you will find a predefined method called **BrowseSapWebAPI**. In this method, Parameters and Filters string variables are set and can be modified before pulling data for a given Endpoint Connector.

The initial values of these strings are determined by your Endpoint Connector configuration, and a comment is generated after each line showing the values of each variable.

- The Parameters variable must be a string of key value pairs where the key is the name of the OData parameter, and the value is the value of the OData parameter using OData's data type syntax.
- The Filter variable must adhere to OData's filter syntax. Examples of Parameter and Filter transformations are provided in the comments.

Any changes to the Parameter and Filter variables can be made in the body of the BrowseSapWebAPI method. In the return statement you will see that connectorController.BrowseSapWebAPI is called, taking the Parameters and Filters strings set earlier in the method. The object, connectorController, integrates with the SAP Connector Workspace Assembly to facilitate your SAP connection.


ONESTREAM
800 Dev
Administrator, Dev_800 (http://os800.localhost:50001/onestreamweb)
Business Rules - SapWebAPI_Example_Endpoint_Connector
Finance
Parser
Connector
SapWebAPI_Example_Endpoint_Connector
Smart Integration Function
Conditional Rule
Derivative Rule
Cube View Extender
Dashboard Data Set
Dashboard Extender
Dashboard XFBR String
Extensibility Rules
Spreadsheet
Properties
Formula
using OneStream.Stage.Engine;
using OneStream.Stage.Database;
using OneStream.Finance.Engine;
using OneStream.Finance.Database;
namespace OneStream.BusinessRule.Connector.SapWebAPI_Example_Endpoint_Connector
{
public class MainClass
{
//Reference Code: SapWebAPI_Example_Endpoint_Connector
//Description: Template for generation of Connector Business Rules in SAP Connector.
// The template is "Saved As" a new Connector BR assigning a value to the constants m_SourceGuid, m_SourceType, m_FieldList that define the source data
Main
private DataTable BrowseSapWebAPI(SessionInfo si)
{
var connectorController = new Workspace.SPC.SPC.BusinessRule.DashboardDataSet.SPC_ConnectorController.MainClass();
string parameters = connectorController.GetSapWebAPIParameters(si, m_SourceGuid); //P_FromPostingDate=datetime'2024-01-01T00:00:00',P_ToPostingDate=datetime'2024-12-31T00:00:00'
string filter = connectorController.GetSapWebAPIFilter(si, m_SourceGuid); //Ledger eq '0L' and CompanyCode eq '1010'
// Example parameter transformation
//List<string> transformedKeyValuePairs = new List<string>();
//foreach (string keyValuePair in parameters.Split(","))
//{
// string[] splitKeyValuePair = keyValuePair.Split('=', 2);
//
// if (splitKeyValuePair[0].XFEqualsIgnoreCase("P_FromPostingDate"))
// splitKeyValuePair[1] = "datetime'2018-01-01T00:00:00'";
//
// if (splitKeyValuePair[0].XFEqualsIgnoreCase("P_ToPostingDate"))
// splitKeyValuePair[1] = "datetime'2018-12-31T00:00:00'";
//
// transformedKeyValuePairs.Add($"{splitKeyValuePair[0]}={splitKeyValuePair[1]}");
//}
//parameters = string.Join(",", transformedKeyValuePairs); // combine and set Parameters property
// Example filter transformation
//List<string> companyCodes = new List<string>();
//foreach (WorkflowProfileEntityInfo wfEntityInfo in BRApi.Workflow.Metadata.GetProfileEntities(si, si.WorkflowClusterPk.ProfileKey))
//{
// companyCodes.Add($"CompanyCode eq '{wfEntityInfo.EntityName}'");
//}
//filter = $"Ledger eq '0L' and ({string.Join(" or ", companyCodes)})";
return connectorController.BrowseSapWebAPI(si, m_SourceGuid, false, parameters, filter);
}
Business Rules - :
Data Sources
New

Help and Miscellaneous Information

This page contains solution documentation.

Display Settings

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

Package Contents and Naming Conventions

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

Example Package Name:SPC_PV8.0.0_SV200_PackageContents.zip

Identifier	Description
SPC	Solution ID
PV8.0.0	Minimum Platform version required to run solution
SV200	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. After the development application is created, install the solution and begin design. The following process will help migrate the solution tables properly.

See "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 may 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.