onestream

Table Data Manager Guide

PV620 SV103

Copyright © 2025 OneStream Software LLC. All rights reserved.

Any warranty with respect to the software or its functionality will be expressly given in the Subscription License Agreement or Software License and Services Agreement between OneStream and the warrantee. This document does not itself constitute a representation or warranty with respect to the software or any related matter.

OneStream Software, OneStream, Extensible Dimensionality and the OneStream logo are trademarks of OneStream Software LLC in the United States and other countries. Microsoft, Microsoft Azure, Microsoft Office, Windows, Windows Server, Excel, Internet Information Services, Windows Communication Foundation and SQL Server are registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. DevExpress is a registered trademark of Developer Express, Inc. Cisco is a registered trademark of Cisco Systems, Inc. Intel is a trademark of Intel Corporation. AMD64 is a trademark of Advanced Micro Devices, Inc. Other names may be trademarks of their respective owners.

Table of Contents

Overview 1
Getting Started 2
Application Server Settings 2
Configure the OneStream Application Server 2
Install Table Data Manager 3
Package Contents and Naming Conventions 4
Software Dependencies 5
Select the Table Data Manager Development Location 5
Solution Setup 7
Home 8
Settings 9
Table Data Manager Uninstall Options 10
Using Table Data Manager 11
Defining a Table 13
Defining a View 14
Viewing a Schema 15
Downloading a Schema 16
Uploading a Schema 17

Inspecting Data 18
Exporting Data 18
Importing Data 19
Removing Data 20
Reviewing Activity 20
Viewing Statistics 22
Records 22
BI Blend 22
Creating a Table or View 23
Altering a Table or View 24
Dropping a Table or View 24
Reviving a Table 25
Copying a Table 26
Help and Miscellaneous Information 28
Display Settings 28
OneStream Solution Modification Considerations 28

Overview

Table Data Manager was built to enable the management of tables and views in an Azure SQL Database. A design environment facilitates the defining of tables and views. The separation between the design environment and database implementation provides flexibility. Table and view definitions can be copied between databases, along with data records between tables. Active transactions can be reviewed to uncover possible locking/blocking issues between each database environment.

Table Data Manager provides the following:

- Access to application or external database architecture.
- Ability to manipulate tables and views inside of a database.
- A solution for consultants to interact with the database for the delivery of customer-driven solutions.

Access to Table Data Manager is limited to those with the System Administrator security role. This should be strictly enforced because of accessibility to application information and controls.

Getting Started

Use the following information to understand prerequisites and dependencies, plan your installation, and configure the database server.

> **NOTE:** Before beginning setup, verify that the SQL server has table creation rights on the SQL database to create the custom tables.

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 used by Table Data Manager. If other OneStream Solutions are already in the application, these adjustments may already exist.

Configure the OneStream Application Server

Be sure that these security group settings include those who will be working on and setting up Table Data Manager before you begin.

> **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. Select **Open Application Server Configuration File** > **Database**.
3. Edit the following **OneStream Database Server properties:**

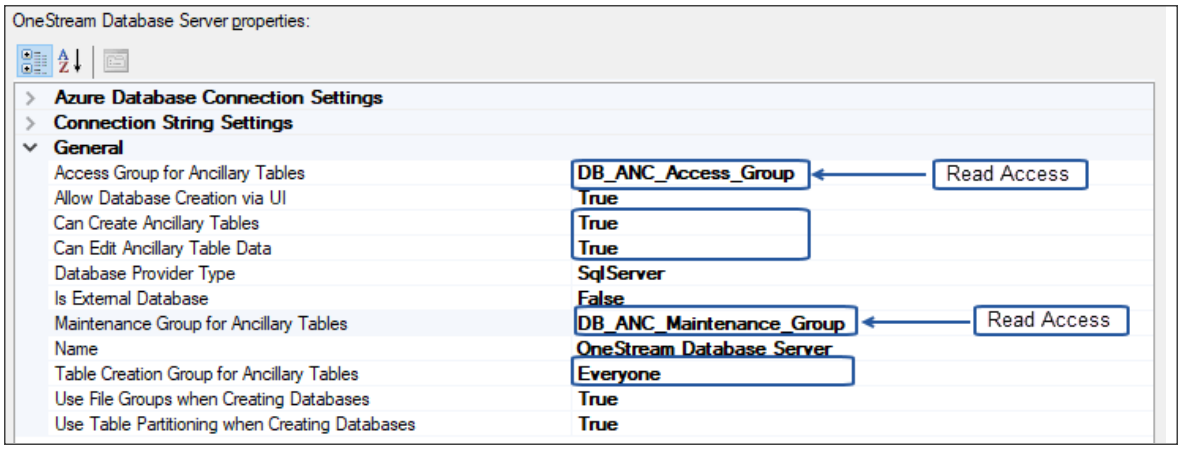
Access Group for Ancillary Tables: Select a group that includes those who will access records.

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: Administrators



4. Restart Internet Information Server.

Install Table Data Manager

1. In OneStream SolutionExchange, go to OneStream Solutions and click the **Table Data Manager** tile.

2. On the Table Data Manager Solution page, select your OneStream platform version from the **Minimum Platform Version** dropdown list.

   This selection automatically displays the appropriate solution version in the next box.

3. Select the most recent version from the **Solution Version** dropdown list and then 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.

Package Contents and Naming Conventions

The package filename contains multiple identifiers that correspond with the Platform. To preserve the integrity of the naming conventions, renaming any of the elements contained in a package is discouraged.

Example package name: TDM_PV6.2.0_SV103_PackageContents.zip

Identifier	Description
TDM	Solution ID
PV620	Minimum Platform version required to run solution
SV103	Solution version
PackageContents	File name

Software Dependencies

The following table describes software dependencies:

Component	Description
OneStream 6.2.0 or later	Minimum OneStream Platform version required to install this version of Table Data Manager.

Select the Table Data Manager Development Location

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

> **NOTE:** OneStream Software strongly recommends that you implement Table Data Manager 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 Table Data Manager.

See Also: OneStream Solution Modification Considerations

Solution Setup

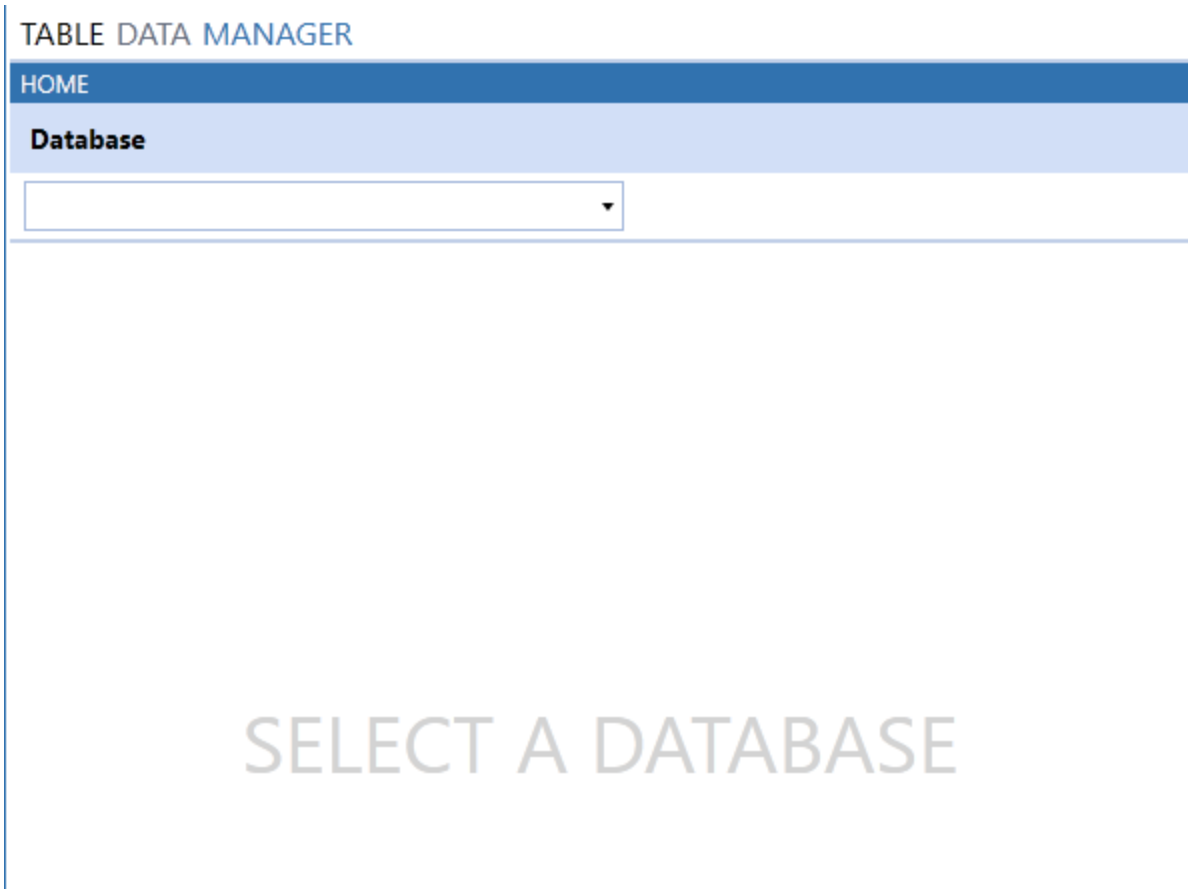
You need to set up tables for Table Data Manager.

1. Select **Table Data Manager** from **OnePlace** > **Dashboards** > **Table Data Manager**. This takes you to the Table Data Manager Setup screen to create the required tables. After initial setup, this is the default viewer when you click into Table Data Manager.
2. Click **Setup Tables** to create or update required solution tables.and select the feature you need to create custom tables for (for example, Guided Reporting).
3. Click **Launch Solution**.

> **NOTE:** Before running the setup, ensure that the account used to access SQL server has table creation rights to the SQL database to create custom tables.

Home

The **Home** page contains the **Database** selection dropdown.



Settings

	The **Settings** page contains a BI Blend section which has a list of External databases you have to set up. You can select which of these databases you use as your BI Blend database in order to review BI Blend statistics. It also contains Uninstall options.
BI Blend Database(s)	This type of database is a special database created to support the BI Blend "read-only" aggregate storage model which is accessed through the OneStream Workflow. Table Data Manager reports upon additional statistics captured during the creation of this database which can be found under Statistics. More than one type of this database can exist and for Table Data Manager to know if this extra data exists, the setting helps to determine which database selection will have the information.

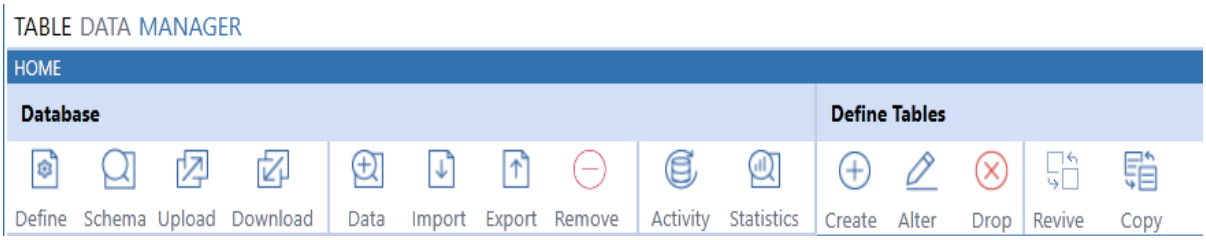
Table Data Manager Uninstall Options

	Uninstall UI removes Table Data Manager but leaves the related data tables with records in place. Use this option if you want to accept a Table Data Manager update without removing the data tables. The Table Data Manager Release Notes will indicate if an overinstall is supported. For some releases, this step should be performed before accepting any new version of Table Data Manager since some of the Dashboard or other objects may have been renamed. Note that some Global Options will also be cleared because their values are stored in Parameters under Dashboards.
	Uninstall Full removes Table Data Manager including the related data tables and records. Use this option to completely remove Table Data Manager or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

CAUTION: The Uninstall procedure cannot be reversed.

Using Table Data Manager

Table Data Manager has several features to help you create, read, update, delete, tables and views within OneStream Software.



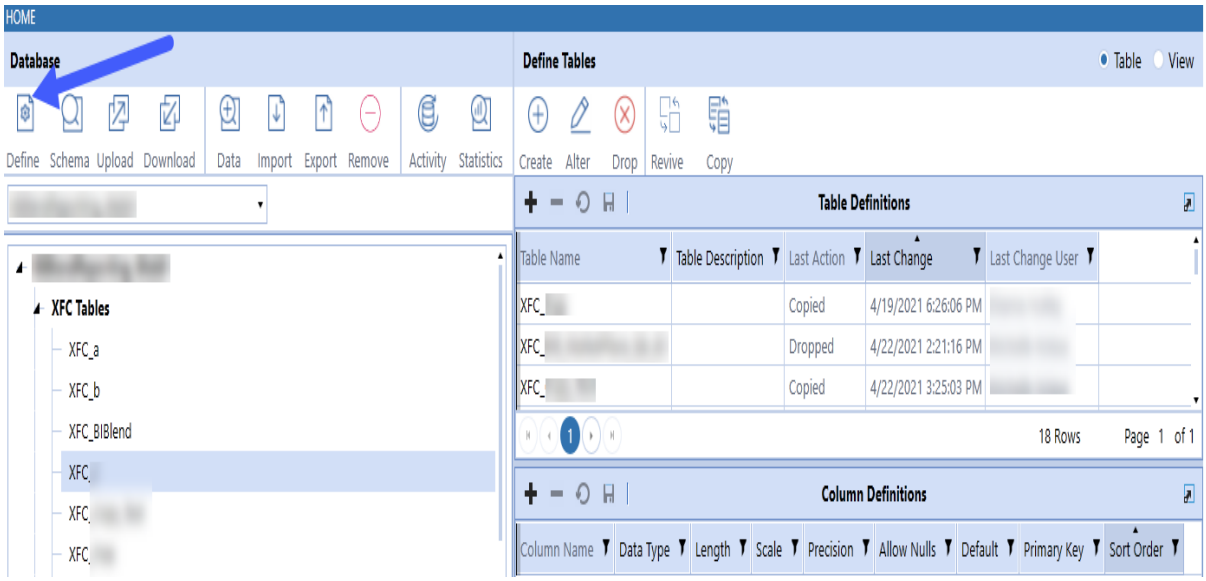
Identifier	Description
Define	Select a database where your XFC table or XFC view will reside. You can define the metadata for an XFC table or XFC view from this button.
Schema	Select any table or view to see its metadata. For example, you can see the column name, data type, length, and other aspects of the table.
Upload	Select a database. Select the download file containing the metadata for your XFC table or XFC view. The file will be used to create a copy in the SQL Database and the Definitions grid.
Download	Select an XFC table or XFC View to download its metadata to a file. This file can be used during the upload process.

Identifier	Description
Data	Select any table or view to look at the data.
Import	Select an XFC table to import the data from the export file
Export	Select an XFC table to export the selected data to a file.
Remove	Removes data from the selected XFC table.
Activity	Select database and click **Activity** to view **Active** and **Blocked** transactions.
Statistics	Select a database, table or view group or individual table or view and click **Statistics** to view the table and view record counts, or specific BI Blend table information.
Create	Select an XFC table or XFC view and click **Create** to add its definition into the database.
Alter	Select an XFC table or XFC view and click **Alter** to change its definition into the database.
Drop	Select an XFC table or XFC view and click **Drop** to remove its definition from the database.

Identifier	Description
Revive	Select an XFC table and click **Revive** to restore its definitions from the database.
Copy	Select any table and click **Copy** to create a mirrored XFC table including data records into table definitions and the database. XFC will be automatically appended as the table name prefix.

Defining a Table

The **Define** button allows you to construct a table using the options available in Table Data Manager. The screenshot below shows the steps that correspond to the **Defining a Table** procedure.



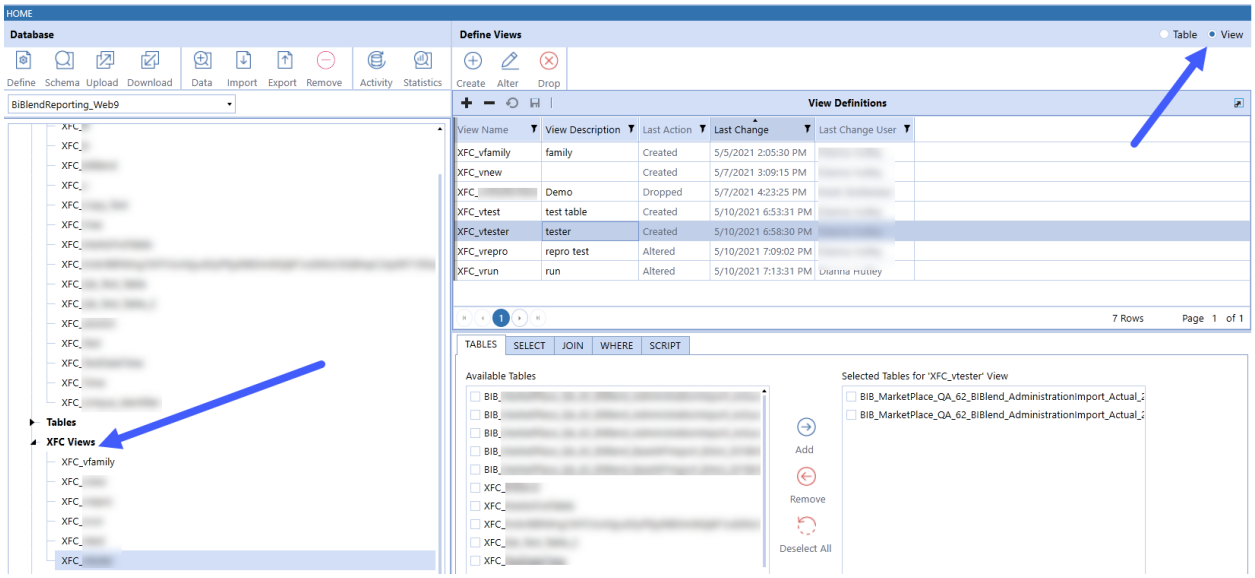
1. Select a database.
2. Click **Define**. The table definitions are displayed in the right column.
3. Click the **Plus** from the menu.
4. Enter a table name and a table description for the table you want to edit.
5. Click the **Save**.
6. Navigate to **Column Definitions** below **Table Definitions**.

Tables created within Table Data Manager have the prefix XFC. Table and column names can contain letters, numbers, and underline characters only.

> **NOTE:** Column definitions support the **Int**,**Char**, **Varchar**, **Nvarchar**, **Bit**, **Bigint**, **Decimal**, **Date**, **Datetime**, **Time**, and **Uniqueldentifer** data types.

Defining a View

The **Define** button allows you to construct an XFC view using the options available in Table Data Manager. The screenshot below shows the steps that correspond to the **Defining a View** procedure.

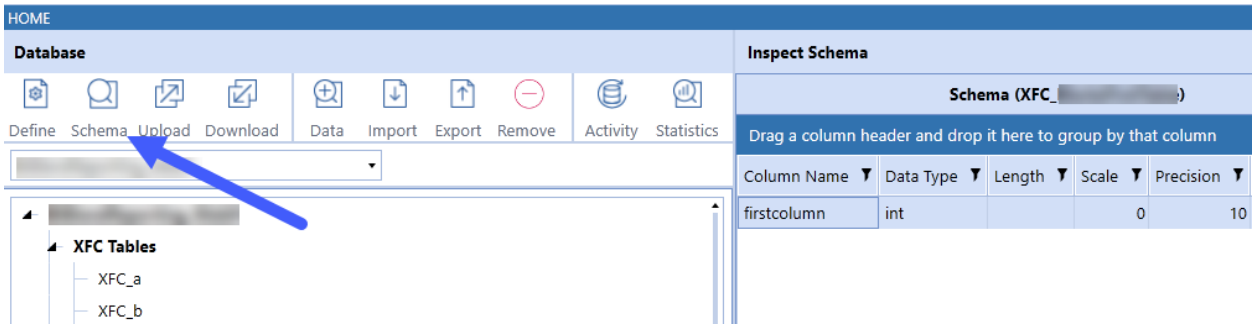


1. Select a database.
2. Click **Define**.
3. Select the **View** radio button. The view definitions are displayed on the right side.
4. Click the **Plus** from the menu.
5. Enter a view name and a view description for the view you want to edit.
6. Click the **Save**.
7. Navigate to tabs below **View Definitions**.
8. Create and edit the definitions on each tab.

Views created in Table Data Manager have the prefix XFC.

Viewing a Schema

You can see the schema for any table or view to help understand how it is constructed.

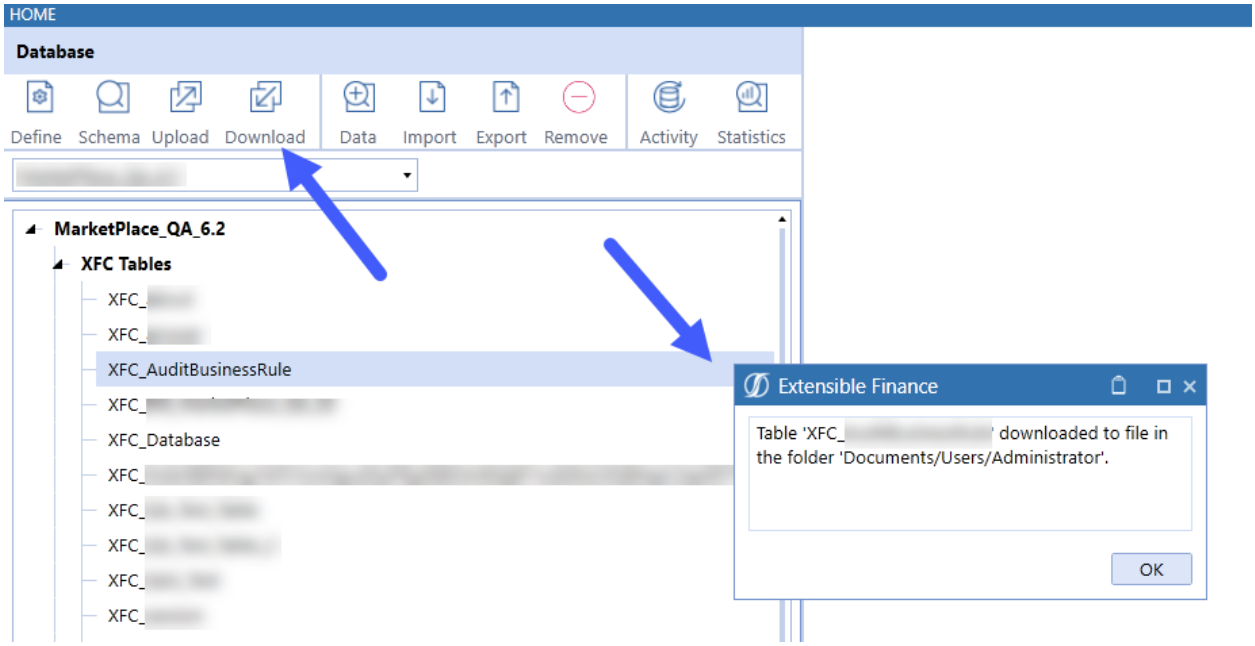


1. Select a database.
2. Select a table or view from the database.
3. Click **Schema**.

You can inspect the schema from the right side.

Downloading a Schema

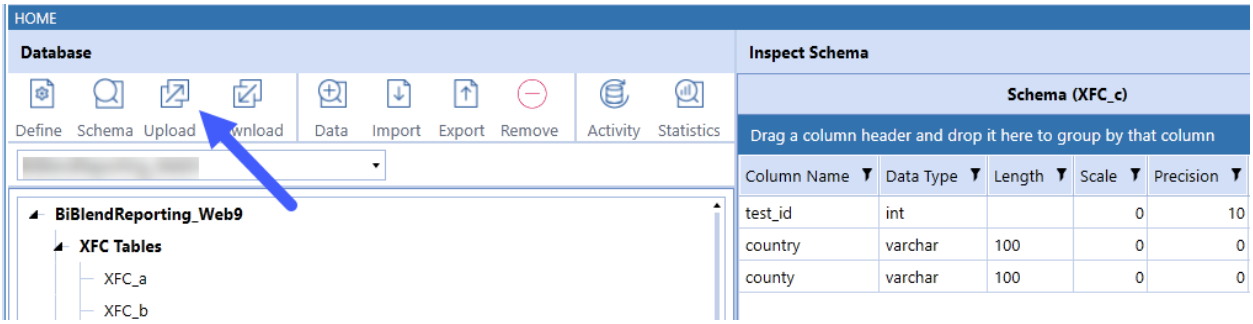
You can select an XFC table or view and download its schema to a file. This allows you to use files in the upload process.



1. Select an XFC table or XFC view from the database.
2. Click **Download**. You will get a notification that the file has been created.

Uploading a Schema

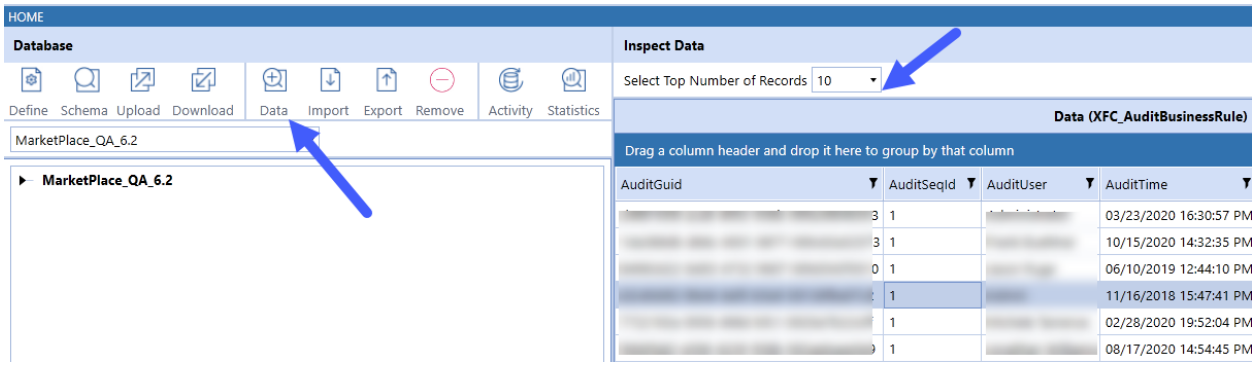
You can upload a file containing metadata for an XFC table or view created from the download process.



1. Click **Upload**. The File Explorer opens.
2. Select a file created during the download process.
3. Click **Open** to upload the file.

Inspecting Data

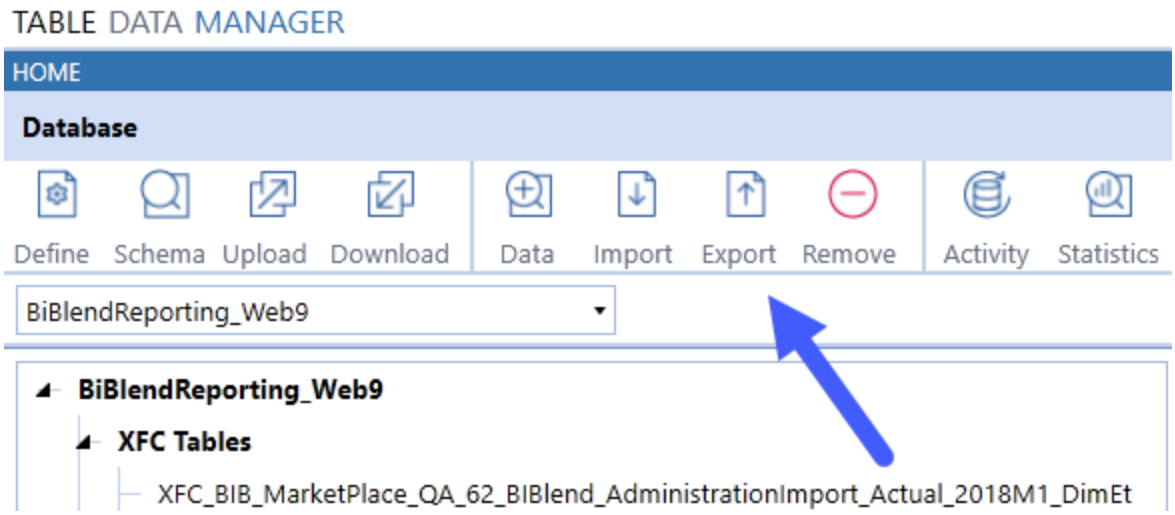
The **Data** button allows you to review some of the records and see what kind of data is coming back from the table or view. You can select between 10-5,000 records for a sampling of the data records.



1. Select a table or view from the database.
2. Click **Data**.
3. (Optional) Click an option (10, 100, 500, 1000, 5000) from **Select Top Number of Records** to expand the data shown.

Exporting Data

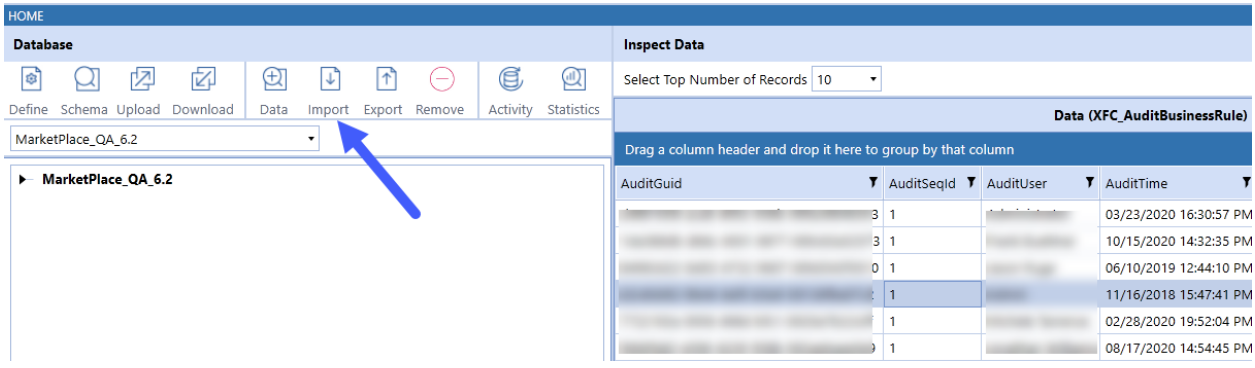
You can only export the data records from an XFC table.



1. Select an XFC table from the database.
2. Click **Export**. The export file will be placed into the user's folder.

Importing Data

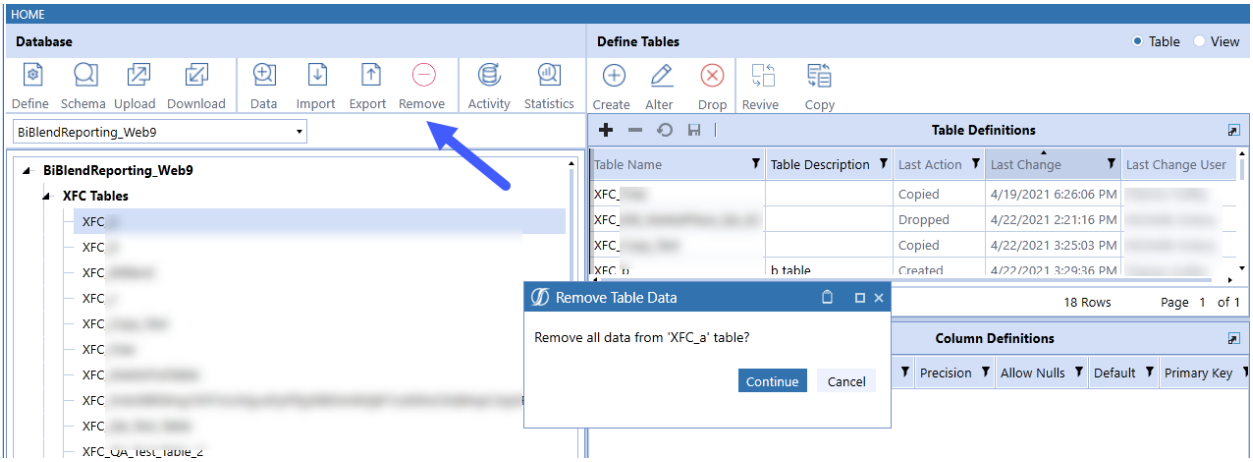
You can import data records to an XFC table using the file created during the export process. The table chosen will need to be empty as the import process will not append or replace records. The table names will need to match.



1. Select an XFC table from the database.
2. Click **Import**. The file explorer opens.
3. Click **Open** to import the file into Table Data Manager.

Removing Data

You can remove data records only from XFC tables.



1. Select an XFC table from the database.
2. Click **Remove** A confirmation prompt opens.
3. Click **Continue** to remove all data.

Reviewing Activity

You can review active transactions occurring in the database. This can be helpful to view the other users within the database to see the current activity. Blocked transactions are transactions which cannot complete because another transaction is blocking it. Use the **Activity** button to troubleshoot this type of problem in your database.

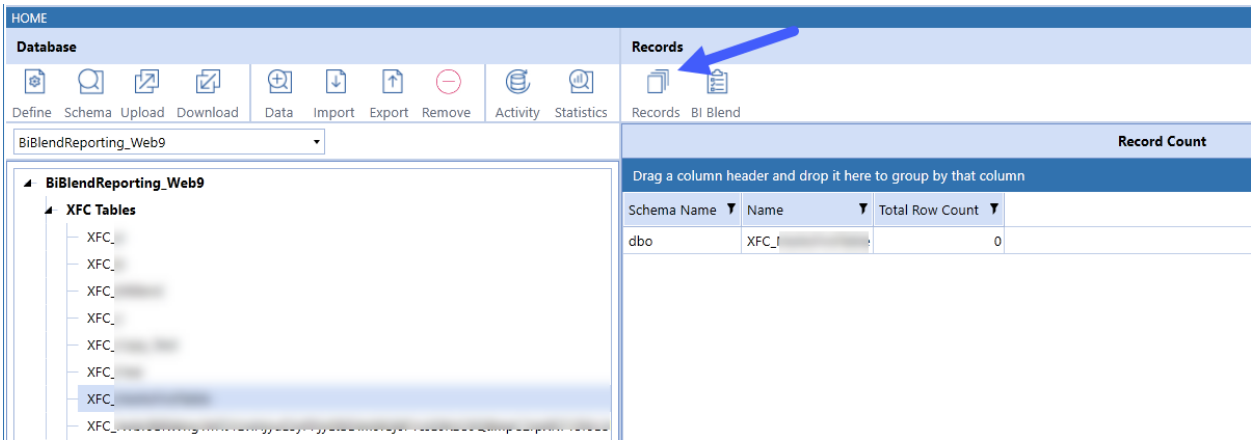
1. Select a database.
2. Click the **Activity** button.
3. Review the activity in the **Active Transactions** and **Blocked Transactions** window.
4. (Optional) Diagnose and resolve issues as needed.

Viewing Statistics

Statistics includes record counts for tables and views, plus BI Blend specific information.

Records

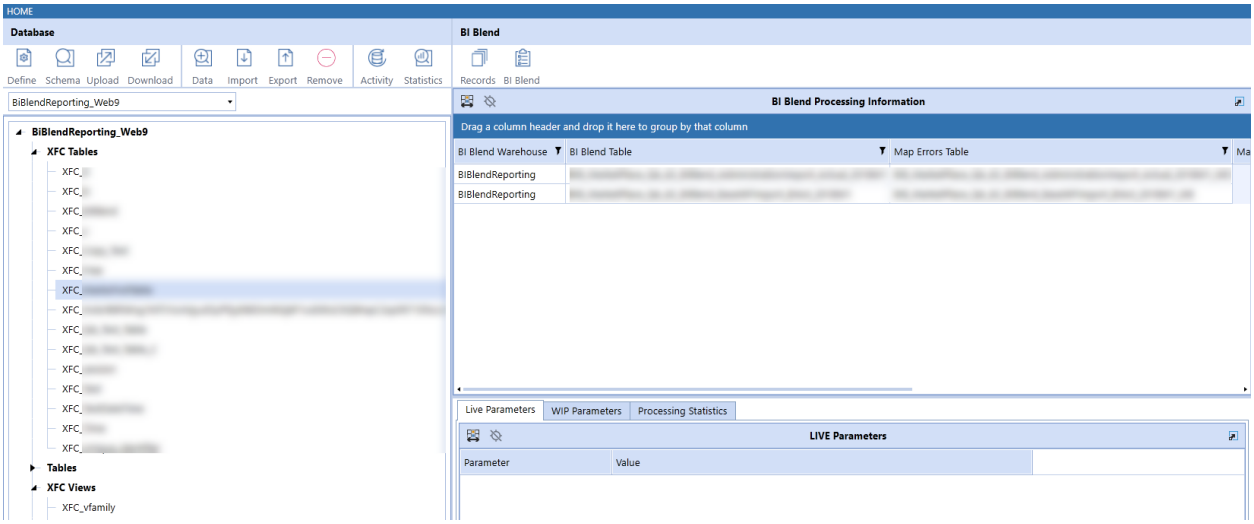
You can display the record count for all tables and views in a database, for a particular table type or view type, or individual table or view.



1. Select a database, table type, view type, individual table, or individual view.
2. Click **Statistics**.
3. Click **Records**.

BI Blend

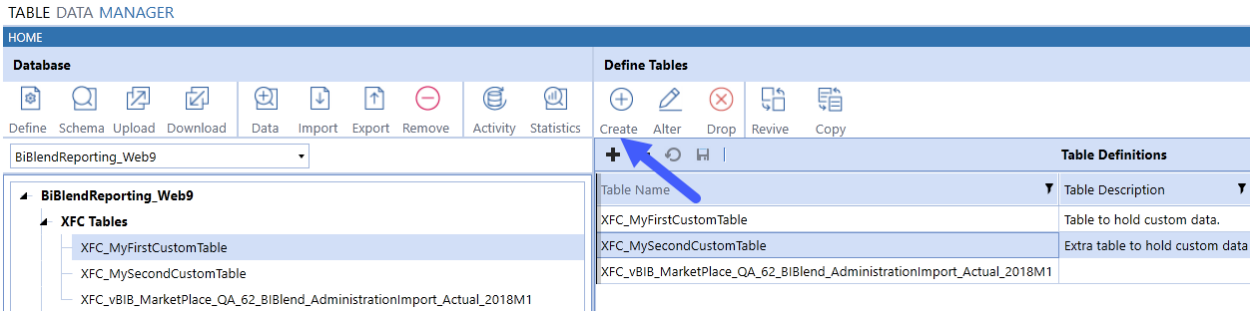
If you are working with a BI Blend database, you will see a BI Blend button. This gives you the same record count but also provides the processing information for **Live Parameters**, **WIP Parameters**, and **Processing Statistics**. This extra information is only available on a BI Blend database.



1. Select a BI Blend database.
2. Click **Statistics**.
3. Click **BI Blend**.

Creating a Table or View

You can create an XFC table or an XFC view on the database.

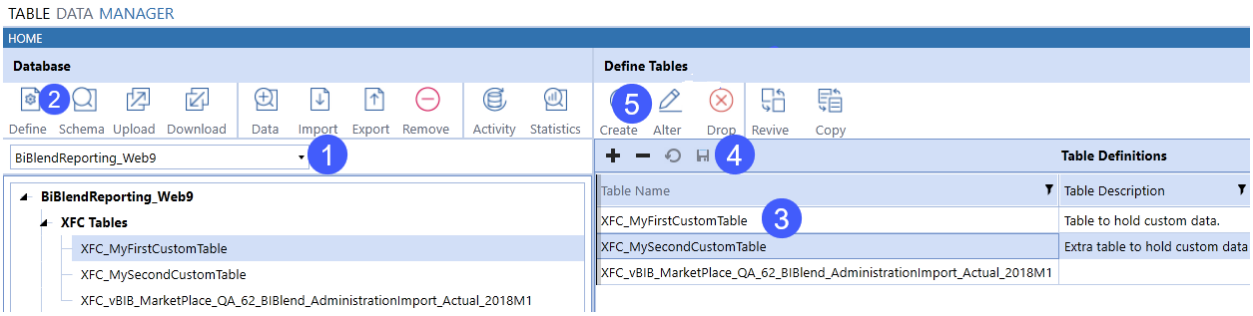


1. Select a database.
2. Select **Define**.

3. Select the specific XFC table or XFC view from the respective **Table Definitions** grid.
4. Click **Create**.

Altering a Table or View

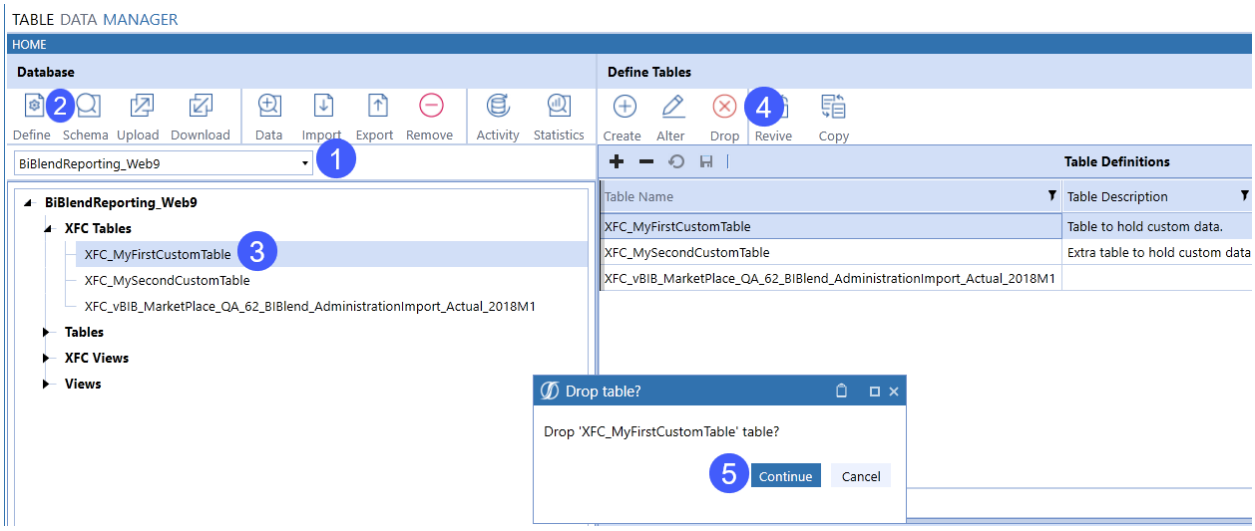
Alter promotes changes made to XFC tables or XFC views during the define process onto the database. The screenshot below shows the steps that correspond to the **Altering a Table or View** procedure.



1. Select a database.
2. Select **Define**.
3. Make changes to the XFC table or XFC view.
4. Click **Save** to keep your changes.
5. Click **Alter** to promote saved changes to the database.

Dropping a Table or View

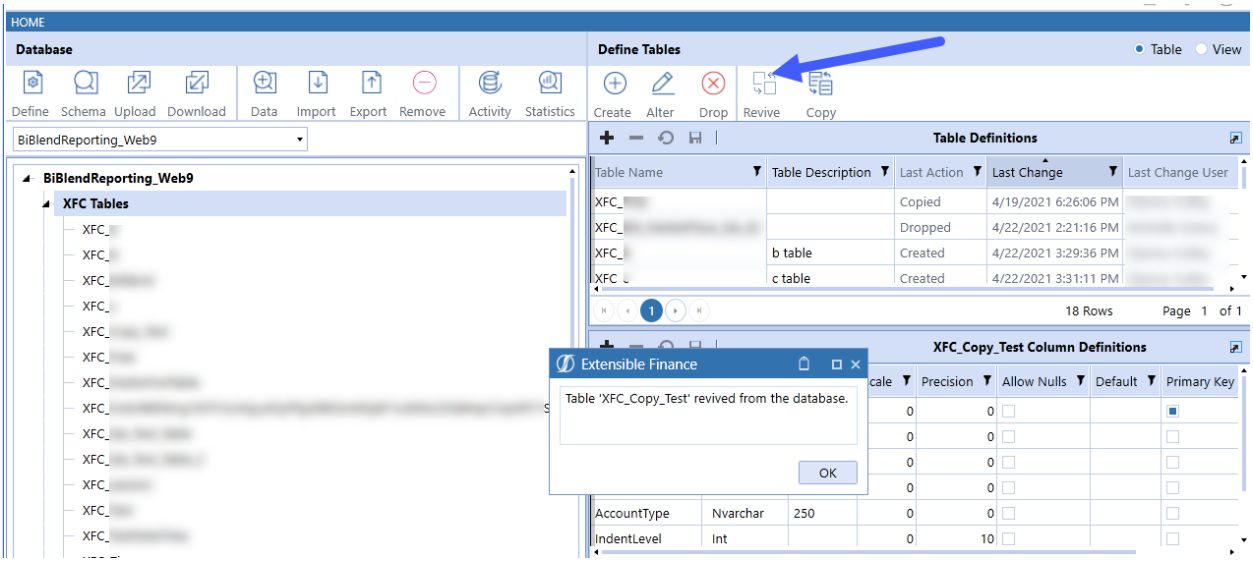
You can drop an XFC table or an XFC view from the database. Before dropping an XFC table make sure all records have been removed using the **Remove** button.



1. Select a database.
2. Select the **Define** button.
3. Select the XFC table or XFC view definition record.
4. Click **Drop**.
5. Click **Continue** on the prompt.

Reviving a Table

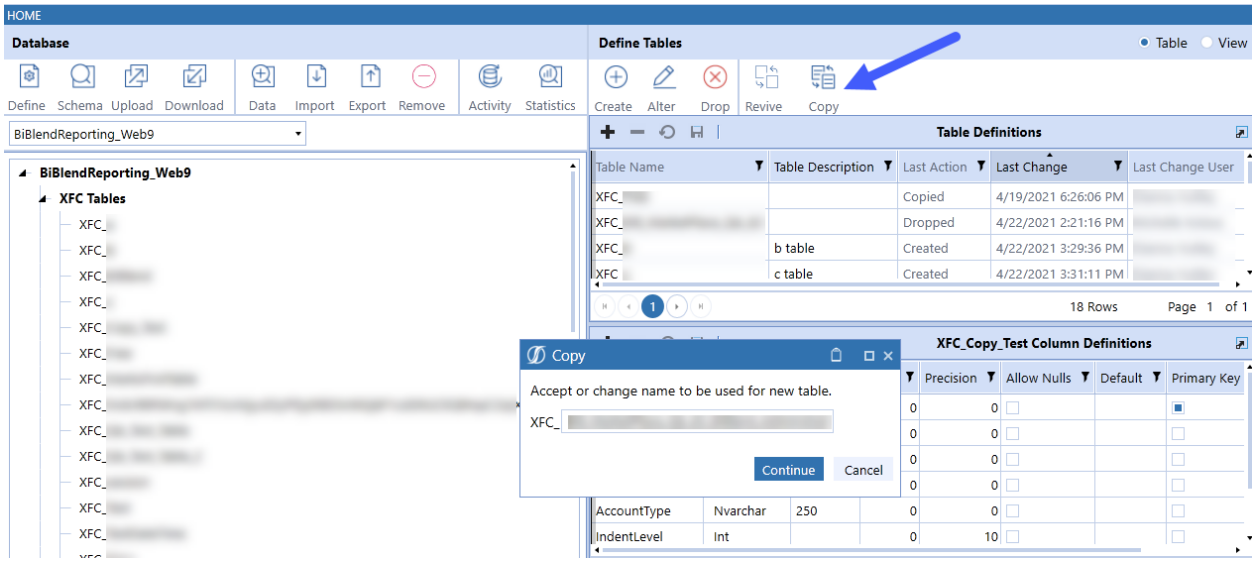
You can revive a table in Table Data Manager. This can be helpful if you lose track of changes during design and need to reset in order to see the original table definition. You will see the table in its original state in the designer.



1. Select a table from the database.
2. Click **Define**.
3. Click **Revive**. A prompt states that the table has been revived from the database.

Copying a Table

You can copy a table which was created using another database management tool into Table Data Manager. This is helpful for allowing custom tables be managed by Table Data Manager. Copying a table takes the schema and records from non-XFC table and copies them into an XFC table. The screenshot below shows the steps that correspond to the **Copying a Table** procedure.



1. Select a database.
2. Click **Define**.
3. Select a non-XFC table to copy.
4. Click **Copy**.
5. (Optional) Rename the table. The "XFC" prefix will automatically be appended.
6. Click **Continue** on the **Copy** prompt.

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.

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

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.