



Xperiflow Cloud Tools Guide

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Overview

This document details the Xperiflow Cloud Tools user interface, including functionality and requirements of each page. Information includes:

- How to interact with a page.
- What happens in the AI Services engine based on user interactions.

Setup and Installation

This section contains details for planning, configuring, and installing the Xperiflow Cloud Tools solution. Before you install the solution, familiarize yourself with these details.

See also: [OneStream Solution Modification Considerations](#)

Dependencies

Component	Description
OneStream 9.0.0 or later	Minimum OneStream Platform version required to install this version of Xperiflow Cloud Tools.
Xperiflow 3.0.0 or later	Minimum version required to install this version of Xperiflow Cloud Tools.
Xperiflow Business Rules V200 (XBR)	External API client library to allow Xperiflow Cloud Tools to interface with the Xperiflow Engine. The required version of XBR is packaged with all Xperiflow Cloud Tools versions.

Set Up Xperiflow Cloud Tools

There are multiple steps to set up Xperiflow Cloud Tools.

Setup and Installation

1. Download the Xperiflow Cloud Tools Solution from the OneStream Solution Exchange.
2. After the OneStream support team ensures that the proper contract is in place, they send a link to download the Xperiflow Cloud Tools solution and a meeting request to complete the setup, which includes setting the endpoint parameter.
3. When you reach the **Home** page displayed in [Xperiflow Cloud Tools Home Page](#), Xperiflow Cloud Tools is set up correctly and functioning properly.

NOTE: Only Administrators or users in the Xperiflow Cloud Tools Administration user group can access the Xperiflow Cloud Tools solution.

Settings

To access the global options page, click **Settings**  in the bottom left corner of the **Home** page or the **Version** page.

Global options include:

- [Global Settings](#)
- [Uninstall](#)

Global Settings

Global Settings

☐ Solution Info ☒ Global Settings ☐ Uninstall

Global Settings

(Security) XCT Admin User Role:
Administrators

Endpoint Parameter:
https://ais1.demo.onestreamtest

(Time Zone) Display Time Format:
(UTC) Coordinated Universa...

(Time Zone) Daylight Savings:
No

Save Close

(Security) XCT Admin User Role: Select who can run an Xperiflow engine upgrade and access the global settings content. The default is **Administrators**.

Endpoint Parameter: Predefined endpoint to access the application.

NOTE: Do not make changes to this value unless instructed to do so.

(Time Zone) Display Time Format: Custom time zone option. The default is **(UTC) Coordinated Universal Time**.

(Time Zone) Daylight Savings: Defines whether Daylight Savings time is observed. The value automatically populates based on the selected time zone. The default is **No**.

Uninstall

There are two uninstall options:

- **Uninstall UI** removes Xperiflow Cloud Tools, including related dashboards and business rules but leaves the database and related tables in place.

Choose this option if you want to accept a Xperiflow Cloud Tools update without removing data tables.

- **Uninstall Full** removes all related data tables, data, Xperiflow Cloud Tools dashboards, and business rules.

Choose this option to completely remove Xperiflow Cloud Tools or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

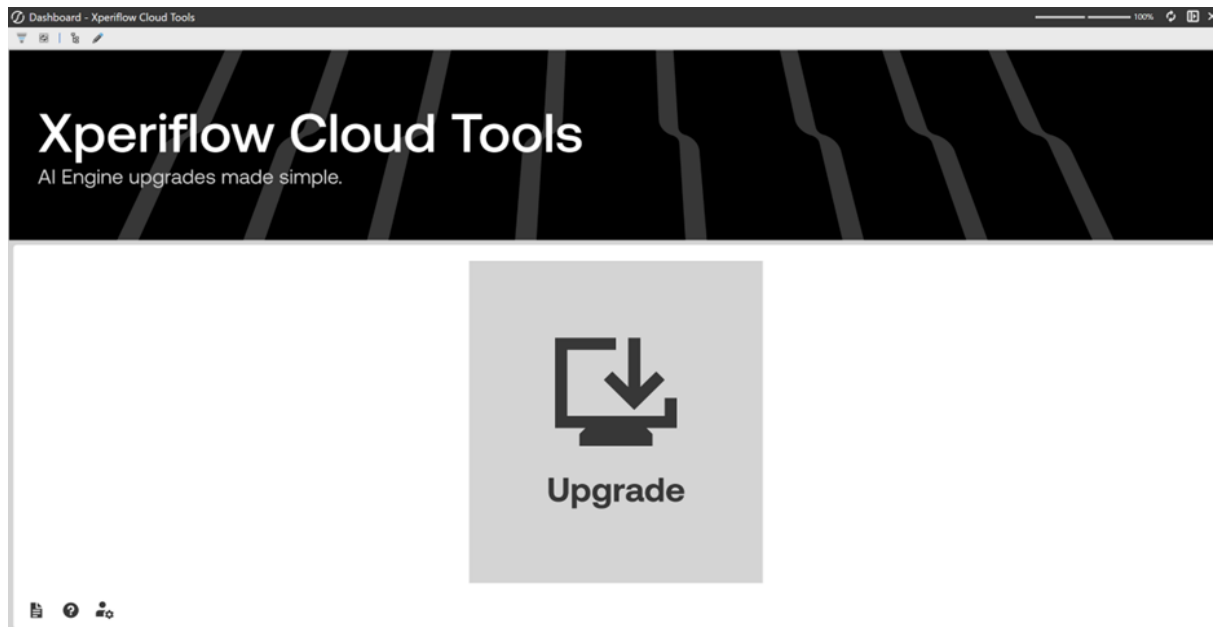
CAUTION: Uninstall procedures are irreversible.

Navigate in Xperiflow Cloud Tools

The following sections describe the ways to navigate in Xperiflow Cloud Tools.

Xperiflow Cloud Tools Home Page

The Home page displays the different cloud tools available to the user.



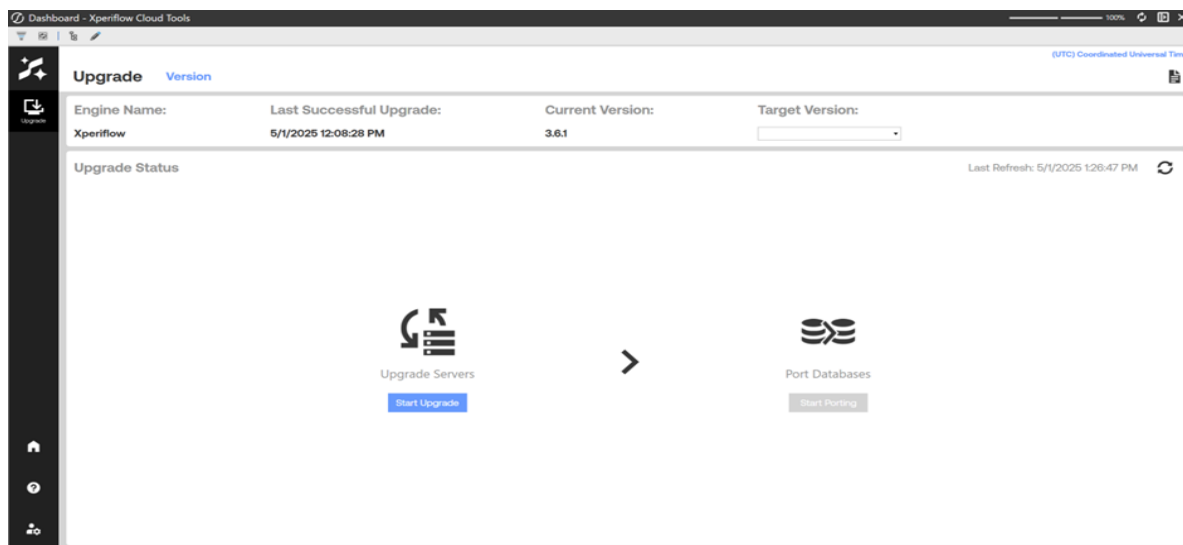
Use the Home page to:

- Navigate to the Upgrade section.
- Access the following toolbar icons.

Icon	Description
	Opens the AI Services Activity Log.
	Opens the Xperiflow Cloud Tools Guide.
	Opens the Xperiflow Cloud Tools settings. Configure global settings options and uninstall the solution. See Settings .

Xperiflow Cloud Tools Sections

The left side navigation includes different sections and the top left navigation shows the pages available in the selected section. Currently, only the Upgrade section exists. It includes one page, the **Version** page.



Toolbar Icons

Icon	Description
	Navigate to the Home page.
	Opens this Xperiflow Cloud Tools Guide.
	Opens the Xperiflow Cloud Tools settings. Configure global settings options and uninstall the solution. See Settings .

Each section page includes a **Home** button at the top right of the page and a set of buttons at the bottom left of the page that provide additional navigation, settings, or help. Your selected time zone displays in the top right corner of the page above the **Home** button.

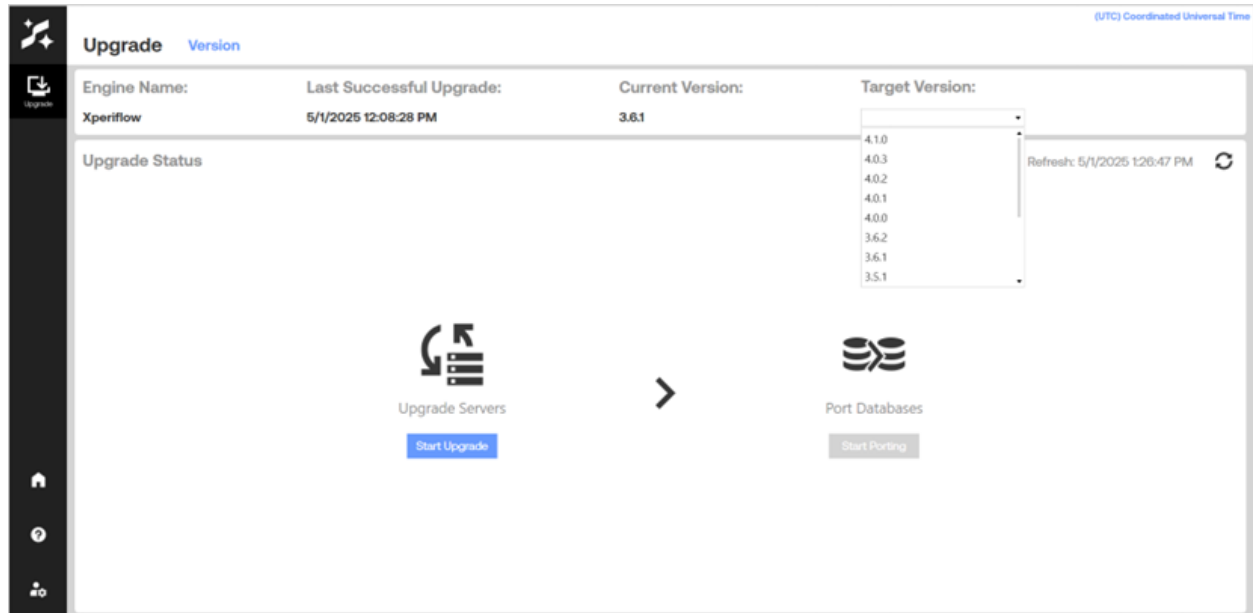
Upgrade Section

The following section describes the layout and functionality of the **Version** page in the Upgrade section.

- [Version Page Layout](#)
- [Run a Version Upgrade](#)

Version Page Layout

TIP: The following image shows the **Version** page in its initial state.



The top pane of the **Version** page includes the following:

- **Engine Name:** Name of the engine to be upgraded (Xperiflow).
- **Last Successful Upgrade:** Date and time of the last successful upgrade.
- **Current Version:** Current Xperiflow engine version that exists in your OneStream environment.
- **Target Version:** Drop-down list of all available Xperiflow engine versions.

The bottom page of the **Version** page includes the following:

- A **Refresh** button  to monitor the status of the current job in progress.
- The date and time of the last refresh.
- The **Upgrade Servers** icon and **Start Upgrade** button.
- The **Port Databases** icon and **Start Porting** button.

Run a Version Upgrade

The version upgrade includes the following:

Upgrade Servers

To begin the version upgrade process:

1. Select an engine version from the Target Version drop-down list.

NOTE: The selected target version must be a more recent version than the current engine version.

2. Click **Start Upgrade**.

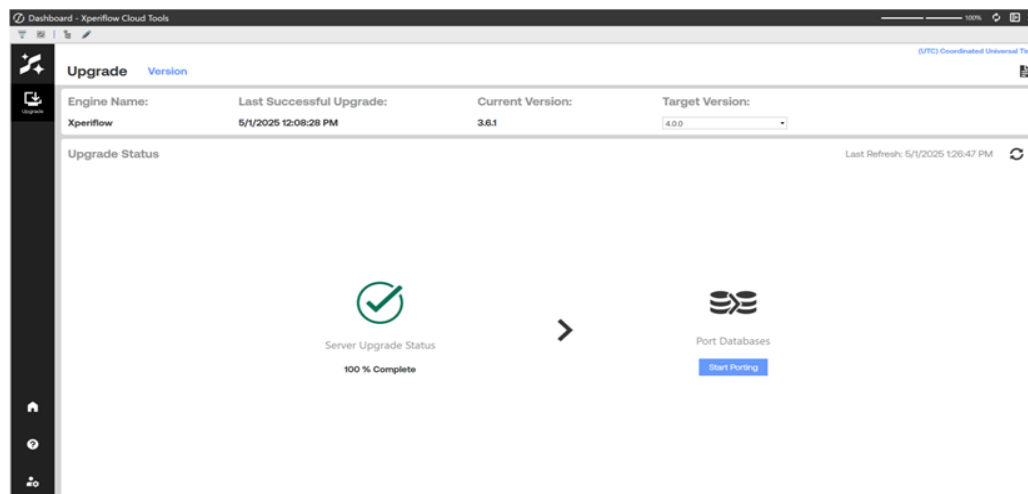
Upgrade Section

NOTE: You cannot change Global Settings or perform an uninstall once the Server Upgrade is running.

3. Click **Refresh** to check the server upgrade status.

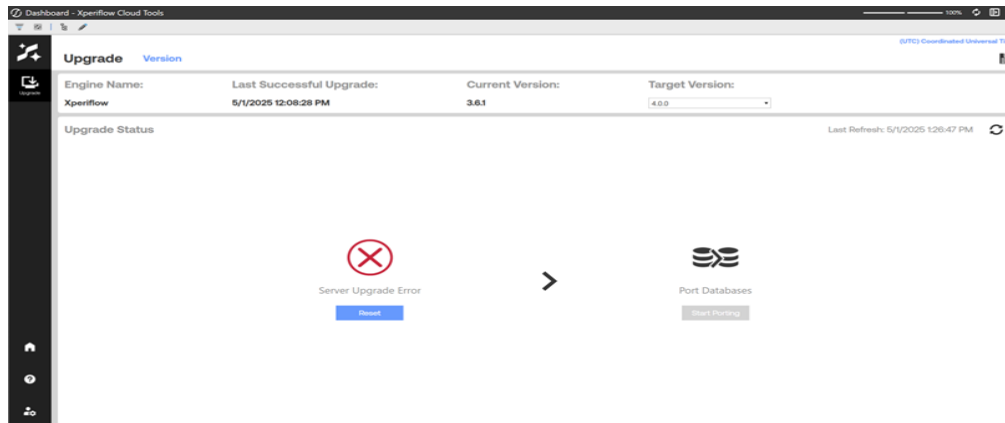
NOTE: The status percentage does not update until at least one of the scale sets has successfully updated. It is common for the percent complete to stay at zero percent for 15 minutes, even if you refresh. Compare the last refresh time to confirm a successful refresh.

If you refresh and the server upgrade has successfully completed, the **Version** page displays as shown in the following graphic:



If you refresh and an error has occurred while upgrading servers, the **Version** page displays the following:

Upgrade Section



NOTE: If an error occurs, you cannot continue and must submit a Support ticket to resolve the issue.

If the Server Upgrade successfully completes, continue to [Port Databases](#).

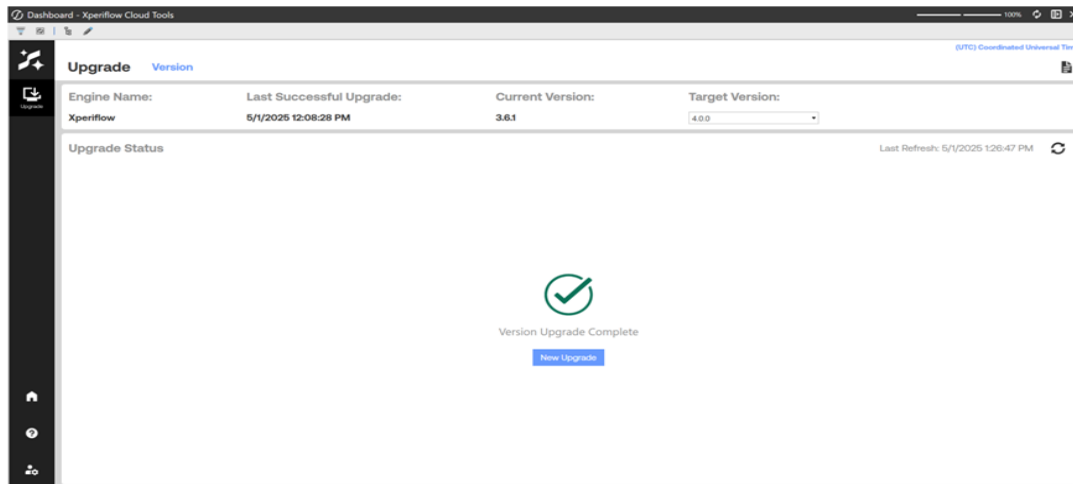
Port Databases

1. In the Upgrade Status pane, click **Start Porting**.

TIP: Click **Refresh** to check the porting job status.

If you refresh and the porting job has successfully completed, the following displays:

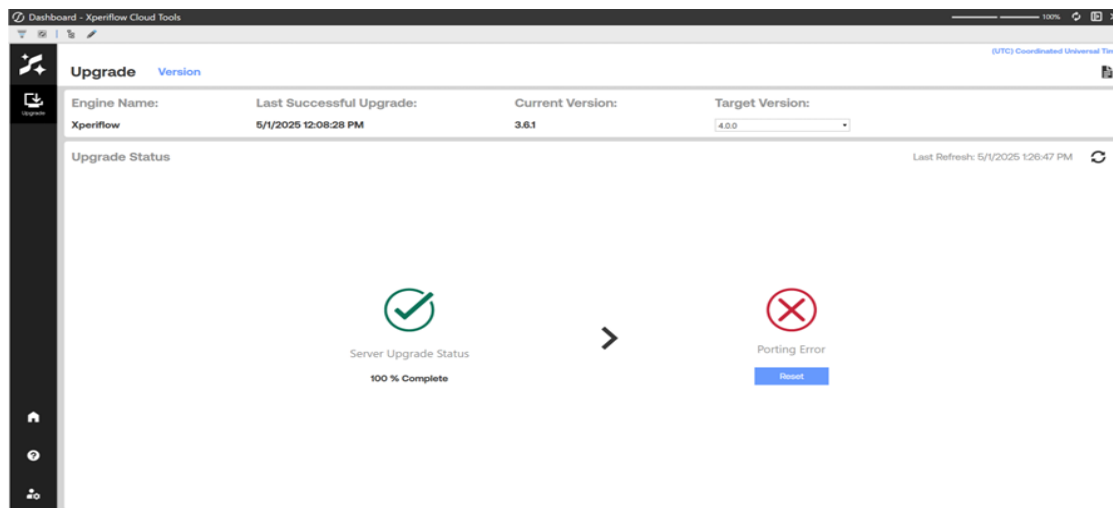
Upgrade Section



The Xperiflow Engine upgrade is now complete. The selected Target Version should now display as the Current Version. The Last Successful Upgrade time is also updated.

2. Click **New Upgrade** to start the new upgrade.

If you refresh and an error has occurred while upgrading, the following displays:

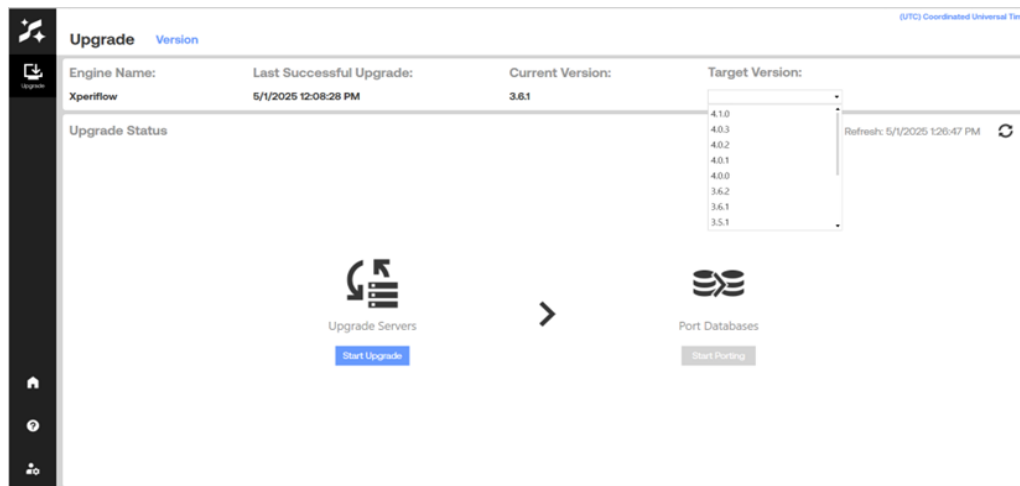


NOTE: If an error occurs, you cannot continue and must submit a Support ticket to resolve the issue.

Resolve Errors

Follow the next steps after a support ticket has been resolved:

1. Click **Reset** under the Error icon.
2. Follow the prompt in the dialogue box to resolve the error.
3. Once the error has been resolved, the following displays in the **Version** page.



Help and Miscellaneous 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 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: XCT_PV9.0.0_SV230_PackageContents.zip

Identifier	Description
XCT	Solution ID

Identifier	Description
PV9.0.0	Minimum Platform version required to run solution
SV2.3.0	Solution version
PackageContents	File name

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.