OneStream®

Application Control Manager Guide

PV800 SV101

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Solution Overview

OneStream Application Control Manager is a MarketPlace solution designed to support and manage change requests and ensure the right level of control and governance over application changes.

With Application Control Manager, you can:

- Import metadata from ERP, data warehouses, or MDM tools and synchronize changes to OneStream.
- Provide an easy way for users to request changes to OneStream applications. For example, new or updated accounts, cost centers, other dimensions and user privileges.
- Allow governance of user security creation and maintenance.
- Utilize multi-level approval workflow for change requests.
- Create audit reports on application change requests.
- Use Mass Update to import multiple change requests at once

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.

Dependencies

Component	Description
OneStream 8.0.0 or later	Minimum OneStream Platform version required to install this version of Application Control Manager.
Microsoft SQL Server 2016 Standard SP1 or later	Application Control Manager requires an instance of Microsoft SQL Server 2016 Standard SP1 or later.

Select the Application Control Manager Development Location

Before beginning installation, decide whether to build the solution directly in the Production OneStream application or in a separate Development OneStream application. This section provides some key considerations for each option.

Production OneStream Application: The primary advantage of building the solution in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity and not advised.

> **NOTE:** OneStream strongly recommends that you implement the solution in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream Application: As a best practice, use the Development OneStream application to build the solution.

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to Application Control Manager, such as **Workflow Profiles** and **Entities**, are in the Production application.

2. Create a backup copy of your Production database or copy your Production OneStream application to your Development environment and rename it. This Development version will be used for your Application Control Manager project.

3. It is suggested to temporarily increase the Database Command Timeout settings for the installation. This can be done in the OneStream Application Server Configuration Tool. In Database Connections under the Connection Strings section, set the Command Timeout and Command Timeout Large settings to 3600. These values can be reverted after the installation is complete.

Install Application Control Manager

> **NOTE:** If you are upgrading from a previous version, you must close any existing and open requests from the previous version to complete the new installation. If an open request is detected, the installation process will stop and a log message will display in the Task Activity Log.

1. On the OneStream Solution Exchange website , go to **MarketPlace** > **Application Control Manager**.

2. On the Application Control Manager Solution page, select the 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 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** icon and click **Open**.

7. When the solution file name displays, click **Load**.

8. Click **Close** to complete the installation.
9. Click **Application Control Manager Installer** and expand the Application Control Manager Installer.
10. Click **Step 1: Install**.
11. Click **Proceed** on the Installation Process Warning message.
12. Close the dialog box when the installation process is complete.
13. Refresh the application and navigate to **OnePlace** > **Dashboards** > **Application Control Manager**. You will see the solution.

Set Up Application Control Manager

The first time you run Application Control Manager, tables are set up from the installer.

Package Contents

The Application Control Manager is the user interface for settings and application governance. The following Business Rules are included:

- ACM_MetadataSource
- ACM_DataSet
- ACM_Reports
- ACM_Config
- ACM_Engine
- ACM_FlowHelpers
- ACM_Globals
- ACM_Helpers
- ACM_ItemHelper
- ACM_Logging

- ACM_Objects
- ACM_RequestHelper
- ACM_SolutionHelper
- ACM_SQLHelpers
- ACM_Validations
- ACM_Param
- ACM_CreateFlowViews
- ACM_CreateRequest
- ACM_MetadataCommit
- ACM_PrepareMetadata

The following items are included with the installation to import metadata from source.

- Dimensions:
  - Entity dimension: ACM_MetadataImportMember
  - Scenario dimension: ACM_MetadataImportScenario
  - Account dimension: ACM_MetadataImportParent
- Cubes
  - ACM_MetadataImport
- Workflow Profiles
  - ACM_MetadataImport
- Data Management Group
  - ACM MetadataImport
- Parser

- ACM_ImportMetadata
- Connector Business Rules:
  - ACM_AccountSource Business Rule
  - ACM_EntitySource Business Rule
  - ACM_UD1-8Source Business Rule
- Transformation Rules:
  - ACM_ImportMetadata_View
  - ACM_ImportMetadata_Account
  - ACM_ImportMetadata_Entity
- Transformation Rule Profile:
  - ACM_ImportMetadata
- Standard default Metadata, Layouts, Properties, Validations, and Request Profiles

Data Management Sequences and Steps are created for use with their related Business Rules. The benefit of running these processes through a Data Management Sequence is that they can run in the background while the user continues their work.

> **NOTE:** It is not recommended to modify any standard default Dimensions, Request Profiles, Layouts, or Properties provided with installation as they may get over-written during the upgrade. Make a copy of them with a different name instead.

Application Control Manager Dashboard

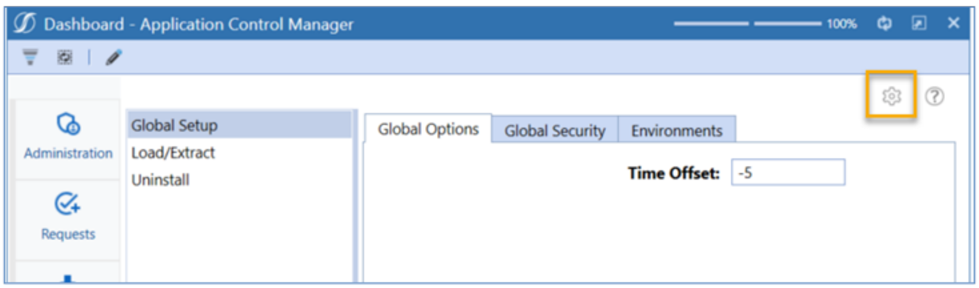
The following sections provide a detailed breakdown of the features in Application Control Manager:

- Settings
- Administration
- Requests
- Metadata File Import
- Exports
- Logs
- Reports

Settings

The Settings page contains global solution configuration settings including initial setup, uninstall, and the ability to delete, extract, or load application configurations data. Normally only an application Administrator should have access to these settings.

Click on the gear icon on the top right of the application to access the pages.



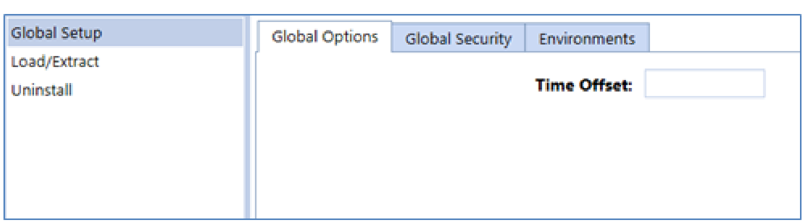
Global Setup

Most global settings are configured once during the initial installation and do not need to be updated on an ongoing basis. There are three sections under the Global Setup:

- Global Options: Set up preferred time zone adjusted from Coordinated Universal Time (UTC)
- Global Security: Select the application Administrator group
- Environment: Set up the environment to use when you Migrate requests

Global Options

Global configuration options apply to the entire solution.



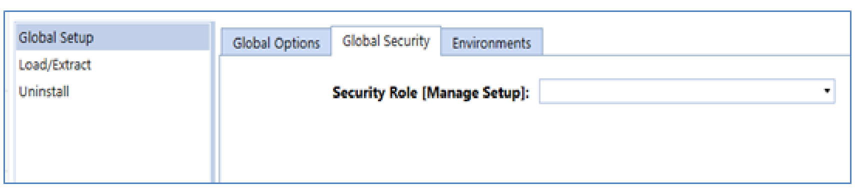
- **Time Offset**: Use to adjust the server time to the local time zone. This is the time stamp used on all activities in the solution. The value is the number of hours to adjust and offset from UTC time. The value can be a positive or negative number to reflect the appropriate time zone.

  Examples:

- Offset to Greenwich Mean Time (GMT) will be 0
- Offset to Eastern Standard Time (EST) is -5
- Offset to Pacific Standard Time (PST) is -8

> **NOTE:** In order to save changes, ensure you select the Save button at the bottom of the page.

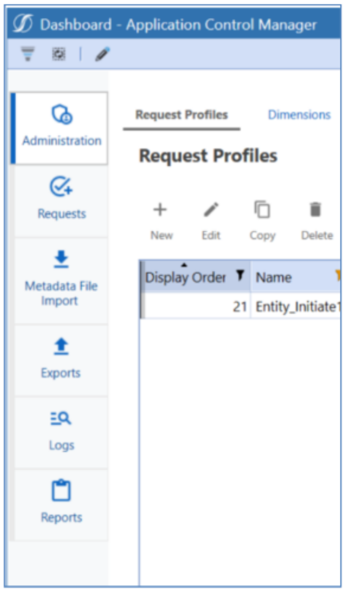
Global Security



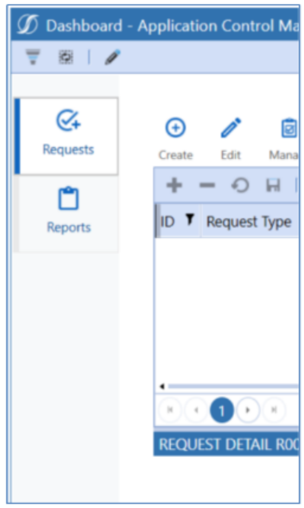
- **Security Role [Manage Setup]**: Select the OneStream security group that will be the Application Control Manager Administrator.

The dropdown selection displays all groups that are set up in the Applications Security Groups. The application left navigation bar will show only the Requests and Reports page for a non-Administrator, while an Administrator will have access to all pages.

Administrator View



Non-Administrator View



Environments

Administrators can set up multiple environments to move metadata across environments. This environment configuration is required to utilize the Migrate functionality. For more information on how to setup the migrate functionality, reference Migrate a Request.

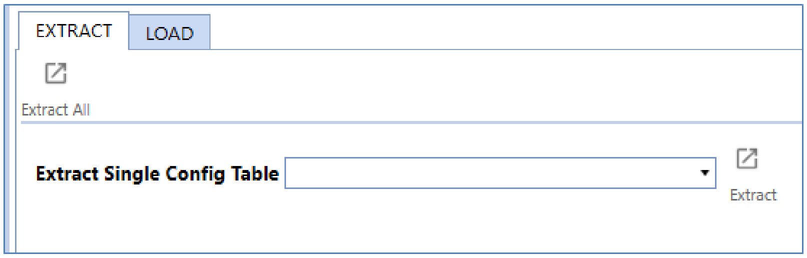
Load/Extract

The Load and Extract pages are designed to allow extraction of the application tables in a SQL text format. The extracted file can be loaded back into the application or loaded to another application.

For example, you can migrate the configuration settings from a Development application to a Test QA application or Production application.

Extract

Use to extract the components of Application Control Manager tables in SQL text format. You can extract a single table or use the Extract All icon to extract every table.



The following tables can be extracted:

XFW_ACM_Action

XFW_ACM_Config

XFW_ACM_CubeDefaults

XFW_ACM_Dimension

XFW_ACM_EmailSettings

XFW_ACM_EmailTemplate

XFW_ACM_Export

XFW_ACM_ExportFile

XFW_ACM_ExportProperty

XFW_ACM_Flow

XFW_ACM_FlowApprover

XFW_ACM_FlowViewProperty

XFW_ACM_PropCatAssignment

XFW_ACM_Property

XFW_ACM_PropertyCategory

XFW_ACM_ReportSetItems

XFW_ACM_ReportSets

XFW_ACM_Step

XFW_ACM_Validation

XFW_ACM_View

XFW_ACM_ViewAssignment

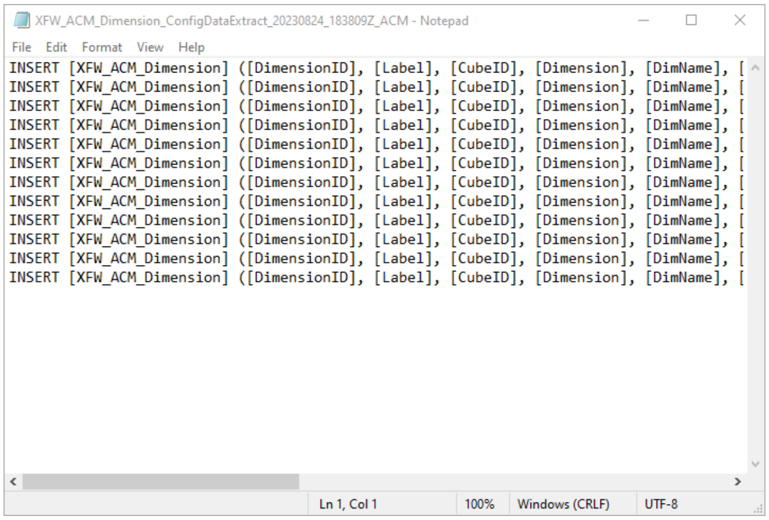
XFW_ACM_ViewProperty

XFW_ACM_ViewTab

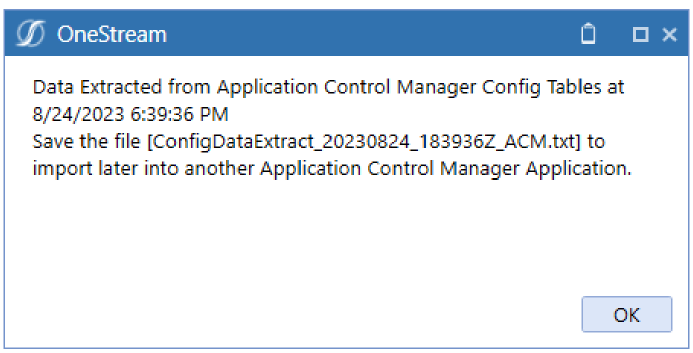
XFW_ACM_ViewTabAssignment

XFW_ACM_ViewValidation

- **Extract**: Select the specific configuration table that you want to extract to a .txt file similar to the one shown below for future import or backup.

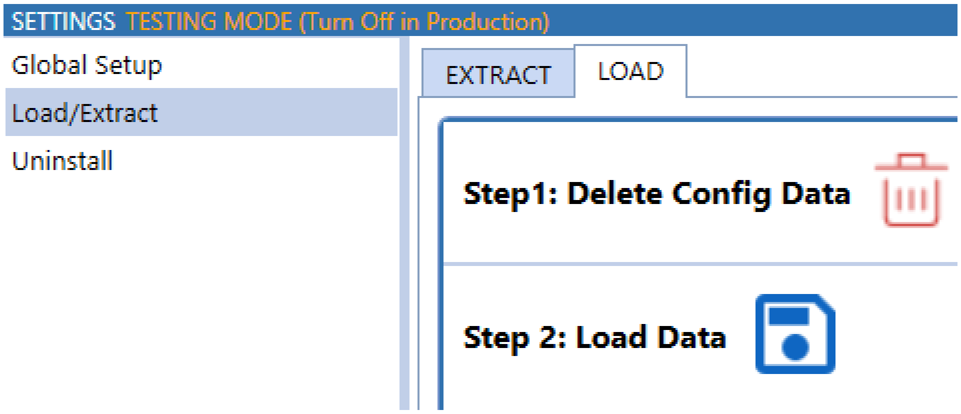


- **Extract All Config Data**: Extracts all tables of Application Control Manager configuration into a .txt file for future import or backup. Successful extraction will result in the following pop up alongside the .txt file.



Load

Use to delete and load the Application Control Manager configuration and components.



- **Delete Config Data**: Clears all current Application Control Manager configuration data in the tables listed below. Use this before importing new configuration data from file.

  The following tables are deleted when selecting this option:

  XFW_ACM_Action
  XFW_ACM_Config
  XFW_ACM_CubeDefaults
  XFW_ACM_Dimension
  XFW_ACM_EmailSettings
  XFW_ACM_Export
  XFW_ACM_ExportFile
  XFW_ACM_ExportProperty
  XFW_ACM_Flow
  XFW_ACM_FlowApprover
  XFW_ACM_FlowViewProperty
  XFW_ACM_PropCatAssignment
  XFW_ACM_PropertyCategory
  XFW_ACM_ReportSetItems
  XFW_ACM_ReportSets
  XFW_ACM_Step
  XFW_ACM_Validation
  XFW_ACM_View
  XFW_ACM_ViewAssignment
  XFW_ACM_ViewProperty

XFW_ACM_ViewTab
XFW_ACM_ViewTabAssignment
XFW_ACM_ViewValidation
XFW_ACM_Property

- **Load Data**: Imports configuration data from chosen file. Must be in a SQL loadable format including INSERT statements.

Uninstall

1. **Uninstall UI** will remove the dashboards and business rules that are created for the application. The configurations data and requests history will remain. This is useful when upgrading to a newer version of the solution.

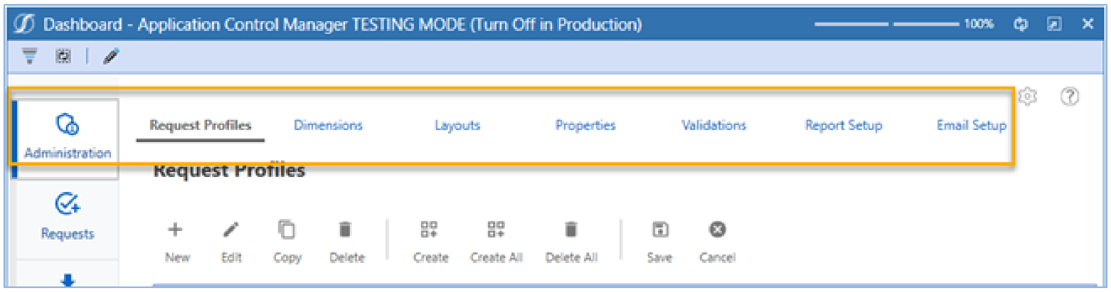
   > **NOTE:** All open requests in Application Control Manager must be closed before performing an Uninstall UI.

2. **Uninstall Full** will completely uninstall the solution including all components and data. This uninstalls the custom database tables and removes all dashboards.

> **IMPORTANT:** Running this process will also delete any open requests. This process cannot be canceled or stopped once started. Unless you have backed up both the dashboards and data, you cannot recover from an Uninstall Full.

Administration

Each section within the Administration page are designed to work together to define the change request. Only administrators should have access to these pages.



Typically, the sequence below is what you will follow to create and complete a Request Profile, which is the main control for a change request. Each section below will be explained in more detail in this guide.

1. **Dimensions (required)**: This is the first step in designing a request. This page defines which dimension types, cubes, and hierarchies are to be managed in a request. This is a required step for the request to commit correctly.

2. **Properties (optional)**: The Properties page defines all the possible properties that can be added to a request and how these properties will be rendered on screen in the Request Profile. The properties table is pre-populated with OneStream properties and delivered custom properties for the users. Normally you will not need to modify the default properties. However, this page allows you to create additional custom properties to enrich requests.

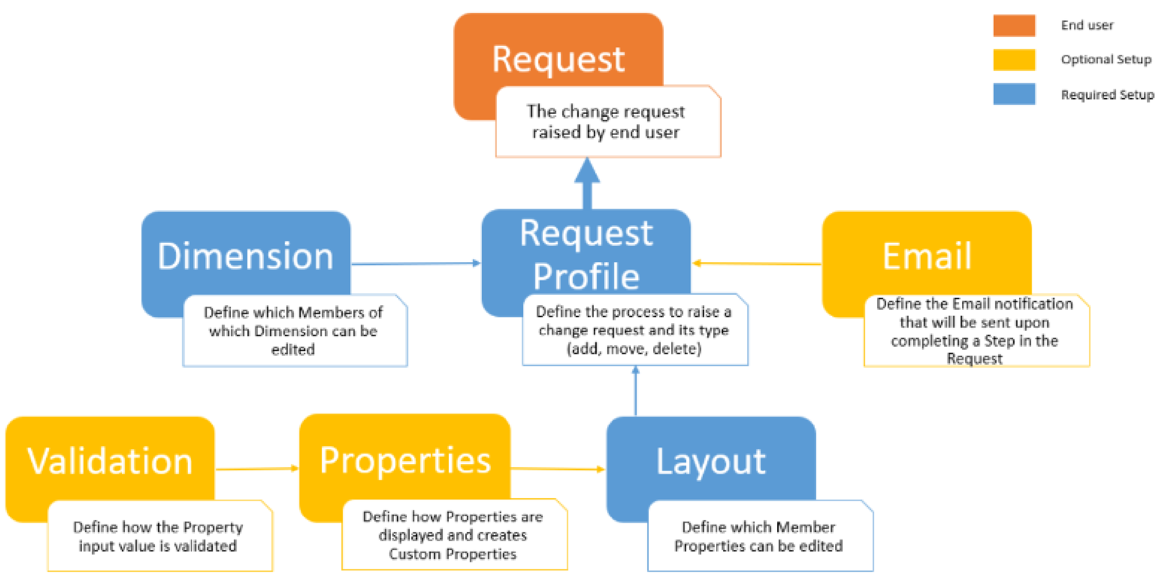
3. **Layouts (required)**: The layout is where you define the properties that can be input within a request step. A layout is required in the Request Profile to turn on allowable actions.

4. **Validations (optional)**: Validation controls the data integrity during input. It is an automated process that runs upon saving a line item and is validating the user input to prevent them from moving a request forward if the field is not valid. You can use the default validations or create a custom validation.

5. **Email Setup (optional)**: Setup an email server and templates here to send out notifications to users throughout a request process. Two email templates are pre-installed in the application, but additional templates can be created. Even if you choose not to leverage email alerts, the system does require an email template to be assigned to the Request Profile as well as each step in the request process.

6. **Request Profiles (required)**: You can define the steps a request should go through, as well as assign security groups and email addresses for each step. You will also define what actions can be taken in a request by assigning a layout to the action. Layouts can vary at each step of the process so that a requester can have a layout different from other users that need to enrich or approve the request during the process.

7. **Report Setup (optional)**: Setup security access for the default reports or create a custom report here.



Refer to Sample User-Initiate Request to learn how to configure a request process from end-to-end with screenshots.

Dimensions

This is the starting point when setting up Application Control Manager. First, users need to define which dimension, cube, and hierarchy can be updated through a change request. A valid dimension configuration is required to complete the Request Profile and for a request to run correctly.

A single dimension can be setup across multiple cubes, or the same dimension can be separated by different hierarchies or inherited dimensions.

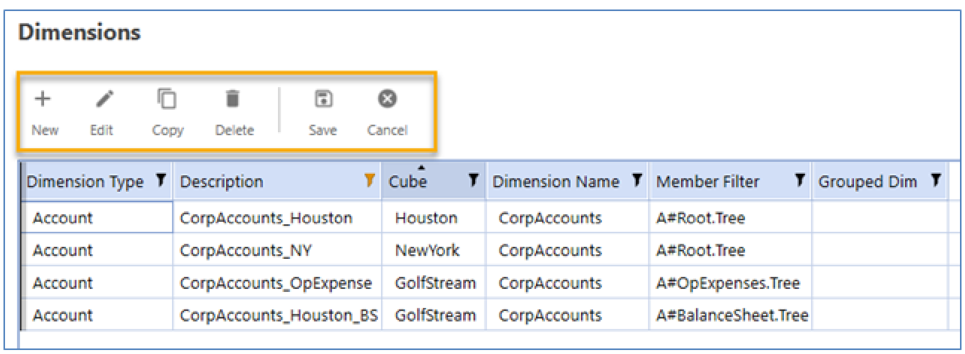
For example, when setting up for an **Account** dimension:

- The same CorpAccounts dimension name with the same root hierarchy can be assigned to different cubes.
- The same CorpAccounts dimension name can also be filtered down to a subset of the hierarchy such as Balance Sheet or Operating Expenses.
- If there is an inherited dimension, you can also setup a dimension for it by selecting the inherited dimension name.

Dimension Type	Description	Cube	Dimension Name	Member Filter	Grouped Dim
Account	CorpAccounts_Houston	Houston	CorpAccounts	A#Root.Tree	
Account	CorpAccounts_NY	NewYork	CorpAccounts	A#Root.Tree	
Account	CorpAccounts_OpExpense	GolfStream	CorpAccounts	A#OpExpenses.Tree	
Account	CorpAccounts_Houston_BS	GolfStream	CorpAccounts	A#BalanceSheet.Tree	

Dimensions that are configured here will be used as selections when setting up the Request Profile.

Dimensions Toolbar



Dimension Type	Description	Cube	Dimension Name	Member Filter	Grouped Dim
Account	CorpAccounts_Houston	Houston	CorpAccounts	A#Root.Tree	
Account	CorpAccounts_NY	NewYork	CorpAccounts	A#Root.Tree	
Account	CorpAccounts_OpExpense	GolfStream	CorpAccounts	A#OpExpenses.Tree	
Account	CorpAccounts_Houston_BS	GolfStream	CorpAccounts	A#BalanceSheet.Tree	

- **New**: Create a new dimension selection. This will bring up the Dimensions editing page allowing you to filter the dimensions as discussed in the section above.
- **Edit**: Select a dimension and click **Edit** to modify.

> **NOTE:** If a Dimension has any associated request, either open or closed, you will only be able to edit the Member Filter tied to the dimension. This preserves the audit trail of the request.

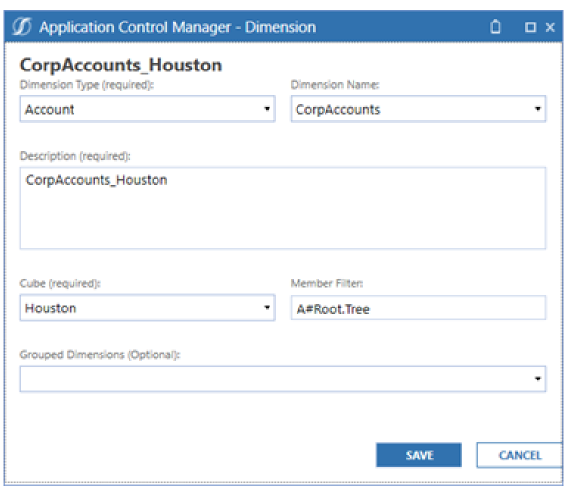
- **Copy**: Select an existing dimension to copy. This will bring you to the editing page where you will be required to provide a unique description.
- **Delete**: Select an existing dimension to delete. A dimension cannot be deleted if it is assigned to a Request Profile. This restriction is to ensure accidental deletion when a Dimension is being used in a change request. The system will deliver with preset dimensions to support the Metadata File Import process using the Excel template.

> **IMPORTANT:** It is not recommended that you delete these dimensions.

- **Save**: Save changes made in the grid.
- **Cancel**: Cancels all changes made directly in the grid since the last save

Dimensions Grid and Editing Page

Dimension fields can be edited directly on the Dimension page grid or by using the editing page. This page is accessible when you select New, Edit, or Copy icons.



- **Dimension Type (required)**: Type of dimension that can be updated within the request. Drop-down list of the twelve supported dimension types (Entity, Account, Scenario, Flow and UD1-UD8).
- **Dimension Name**: Based on the selection of the dimension type above, this field will filter a list of associated dimensions from the application's dimension library.
- **Description (required)**: Unique identifier used in the Request Profile to manage a dimension. Description length cannot exceed 250 characters.
- **Cube (required)**: All available cubes within your application are listed in the drop-down.
- **Member Filter**: Further limit the dimension hierarchies, members, and more, that are available for updates by specifying a member filter here. Example format of member filters is:

  A#Root.Tree

  UD1#CostCenters.Base

  The first part of the filter indicates the dimension type with the # sign, followed by the level of the hierarchy, and then the expansion. These are the available dimensions and expansions:

  - Dimensions:
    - A# - Account
    - E# - Entity
    - S# - Scenario
    - F# - Flow
    - UD1# through UD8# - UD1 through UD8
  - Member Expansions:
    - Member
    - Base
    - Children

- Children(I)
- Descendants
- Descendants(I)
- Tree
- Tree Descendants
- Tree Descendants (I)

- **Grouped Dimensions (optional)**: This feature allows you to create a member in multiple dimensions with only one input during a user-initiated request process. Grouped Dimensions can only be edited from the Dimension editor dialog box, not in the summary grid.

  For example, when you group Entity and UD1 together, a user only needs to input once in the request and the application will automatically generate the second line item for the other grouped dimension.

  > **NOTE:** The Grouped Dimensions feature is not compatible with Mass Update. To make changes to multiple dimensions in a single request, add your dimensions to the request profile, then you can make changes to multiple dimensions when using Mass Update.

See Setup and Use Group Dimensions.

Properties

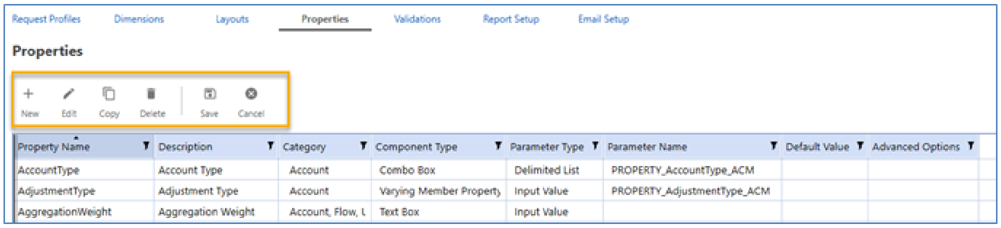
The Properties page contains a table that is pre-installed with all the OneStream dimension properties and commonly used custom properties that you can leverage when creating a request. In this page, users can view, edit, or add properties that may be leveraged when creating a layout.

Properties must appear on this page to be added to a layout and used in the request process.

> **CAUTION:** Administrators should avoid editing or deleting any of the pre-installed properties. Editing the parameters or component types for OneStream dimension properties may cause a commit error. There is no risk to leaving the properties in the table for potential future use.

For information on the function of each OneStream property, see OneStream Software Design and Reference > Application Properties.

Properties Toolbar



New: Create a new property, like a custom property needed to support your organization's request process.

Edit: Select a property and click **Edit** to modify.

Copy: Select an existing property to copy. This will bring you to the editing page where you will provide a unique description.

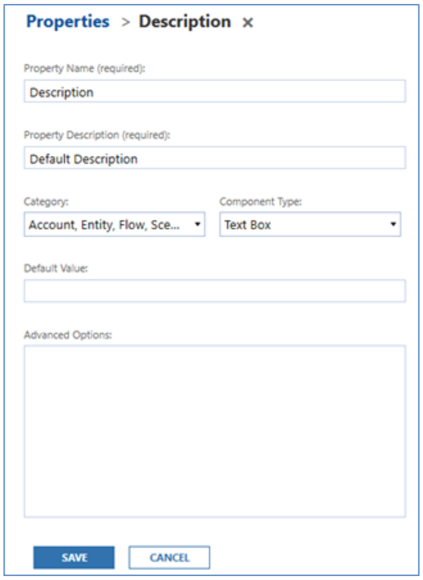
Delete: Select an existing property to delete. A property cannot be deleted if there is an associated request.

Save: Save changes made in the grid.

Cancel: Cancel all changes made directly in the grid since the last save.

Properties Grid and Editing Page

All properties for the twelve OneStream supported dimensions, the Security User properties, and the Custom created properties are included in the property grid. For each property, the following configurable fields are available for update either directly on the grid or by using the editing page.



Property Name and Property Description

The required property name and description for default properties are defined by OneStream. It is not recommended to delete or edit the default OneStream properties. Users will need to create a name and description for any custom created properties. All properties must have a unique name and description in order to save.

The unique name is used for data storing purposes in the table. You can use the custom label function within the **Layout** page to control how an end user will see the property names in the layout.

> **Example:** if the property “Description” is used across multiple categories, the property may have different custom labels for ease of use within the different layouts. If a user creates two layouts Entity and UD1, they may have the Description property in both. The Description property within the Entity layout could have a custom label of “Entity Name” while within the UD1 layout, the Description property could have the custom label “Cost Center Name”, making them unique and easier for the end user to understand.

Category

Each property is attached to a category to allow easy filtering. You will see the filtering in the Layouts page under the **Available Properties** pane. The categories include:

- The standard twelve OneStream dimension types: Account, Entity, Scenario, Flow, and UD1-UD8
- User Security properties
- Custom properties specific to Application Control Manager

A property can be linked to multiple dimension types. For example, the Description property is attached to all twelve standard dimension types.

In addition, you can create a custom property and link it to a dimension category so that it is easy to find in the available properties list within the layout screen.

> **Example:** If you wants to track the department requesting an account, you can create a custom property for department, assuming it is not already a UD, and categorize it in Custom Properties as well as in the Account. This ensures admins can find the property when creating a new layout.

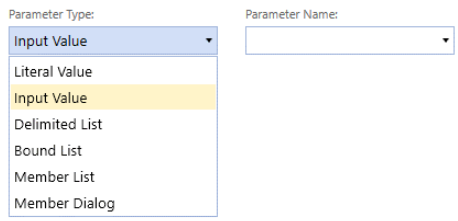
Component Type

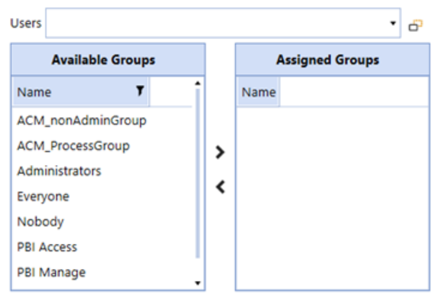
Component type defines how the property will appear in the request. It is not recommended to edit the component types for the default OneStream properties and Security properties. These components are displayed in the grid for informational purposes only.

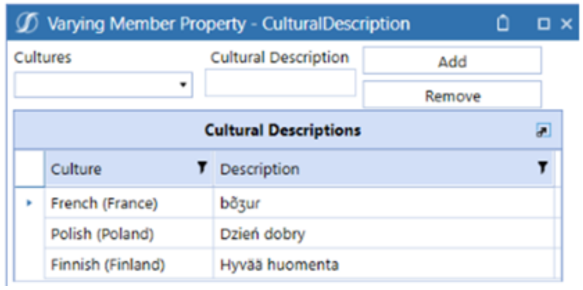
There are many component types available to the user when creating custom properties. The component selection is primarily used for Custom property creation and is normally set to Text Box, Check Box, Combo Box, or List Box.

The table below defines the component types within the drop-down menu:

Component Type	Description
Text Box	Free form input field
Check Box	Ability to check on or off
Combo Box and List Box	Provides a drop-down that can be populated using the following parameter type:

	 See OneStream Design and Reference > Parameter Types for information on the different parameter types. Also, see Custom Delimited List for instructions on how to create a custom parameter within Application Control Manager.
Member Selector	Presents the existing hierarchical structures from the Dimension Library to help users quickly click and select a base member.
Parent Member Selector	Presents the existing hierarchical structures from the Dimension Library to help users quickly click and select a parent member. **NOTE:** For this component type, the Advanced Options need to have the proper parameters including: IsParentName, DimTypeName, and PropName. There should be no spaces in the parameters. For example, IsParentName=True, DimTypeName=|!Item_mdb_DimTypeName_ACM!|, PropName=ParentName
Security Group Selector	Provides a drop-down list of all existing Security Groups in the application.

Security Group Membership	This component has a built-in feature to copy the security group assignment from an existing user. The **Users** drop-down list shows all existing users in the application. The icon is used to copy the selected user's security group to the **Assigned Groups** pane. 
Position Within Parent Selector	Custom component type to support the relationship property **Position**. This property does not store any values and it reverts to Retain Current Position after every commit. This behavior is consistent with the Dimension Library.
Varying Member Property Selector	Custom component type to support all OneStream varying properties. Following are the different varying types that a property could utilize: • Vary by Cube Type (Account, Entity, UD1) • Vary by Scenario Type (Account, Entity, UD1, UD2-UD8) • Vary by Scenario Type and Time (Account, Entity, Flow, UD1, UD2-UD8) • Vary by Year (Use in Scenario Input Frequency property) • Relationship Vary by Scenario Type and Time (Entity)
Cultural Description Selector	Custom component type to support selecting and storing of multiple cultural descriptions.

	 **Cultures**: Drop-down list that displays all the Cultural codes that are setup in the application. **Cultural Description**: Text field to input the desired description. Click the **Add** button to save the description in the Cultural Descriptions grid. Administrators can set up culture codes in the OneStream System Configuration. After the culture codes are set up, you can manage them in Application Control Manager. In the drop-down menu, the culture codes display in the correct code format (for example, en-US or fr-FR). You must use the code format not the name of the language (for example, use en-US not English). For metadata file import, you must provide a separate line for each culture code.
Formula Editor	Custom component type created to support the Scenario dimension property **Formula**. This Formula property differs from other dimension properties by opening an editor instead of a varying property selector.

Default Value

Default value provides a pre-populated value when creating a request. This field is optional, and if not filled out, will appear as an empty field awaiting to be populated.

Advanced Options

Some component types can be customized by passing parameters. When writing parameters ensure there are no spaces in between the parameter name, the equal sign, and the parameter value (within squared brackets). Below are some examples of the parameters in the Advanced Options:

For a Combo Box, Check Box, or Text Box component type, a tooltip can be added to show customized message. When hovering over the property, the user will be able to read the message. An example of a tooltip parameter is:

Tooltip=[Select True if Entity is not the same as IC]

Tooltip=[Field allows for 50 character length Max]

- Use a Member Selector or Parent Selector component type to display existing hierarchical structures from the Dimension Library by entering this parameter:

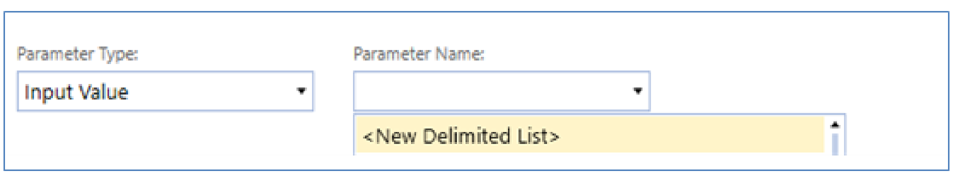
  IsParentName=True, DimTypeName=|!Item_mdb_DimTypeName_ACM!|, PropName=ParentName

- Or to specify a property as a Parent Selector, you would enter: IsParentName=True

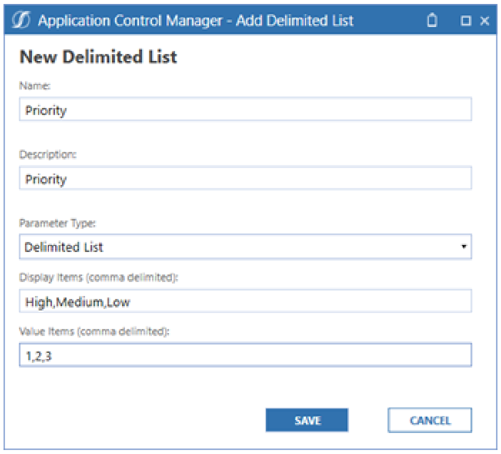
Custom Delimited List

When creating a Combo box or List box, you must specify a parameter name in order to save. You can select an existing parameter or create a new delimited list. To create a new delimited list:

1. Select the <New Delimited List> in the **Parameter Name** field.



2. In the Add Delimited List dialogue, populate the **Name**, **Description** (limit to 87 characters), and **Value items**.



3. Click **Save**. The list will be created as a Parameter under **Workspaces** > **Application Control Manager (ACM)** > **Parameters**, with a prefix of "CustList_" and can be edited from the workspace page.

Custom Properties

Custom properties are used to enrich requests. This allows organizations to create requests with specific sets of information outside the typical security or metadata properties. Examples may include tracking the department generating the request, the risk of the request, or the urgency of the request.

> **NOTE:** These custom properties are only stored within the Application Control Manager table. They are not passed to the OneStream platform, and therefore their values are not stored in the OneStream Dimension Library.

Application Control Manager delivers several commonly used custom properties, but you can set up as many custom properties as needed. A list of the custom properties delivered in Application Control Manager are in the table below:

Name	Description	Definition
ReferenceAccount	Reference Account	Created for user-initated type requests, not applicable for the Metadata File Import process.

		Member Selector component type. Display a list of existing hierarchical structures from the Dimension Library based on the dimension specified in the Request Profile. The parameter in these properties uses the member filter provided for the dimension on the Dimensions page.
ReferenceEntity	Reference Entity	
ReferenceFlow	Reference Flow	
ReferenceScenario	Reference Scenario	
ReferenceUD1	Reference UD1	
ReferenceUD2	Reference UD2	
ReferenceUD3	Reference UD3	
ReferenceUD4	Reference UD4	
ReferenceUD5	Reference UD5	
ReferenceUD6	Reference UD6	
ReferenceUD7	Reference UD7	
ReferenceUD8	Reference UD8	
SelectMember	Base Member Selector	Created for user-initiated type requests, not applicable for the Metadata File Import process. Member Selector component type. Display a list of base members based on the dimension specified in the Request Profile.
SelectParentMember	Parent Member Selector	
CubeType	Cube Type	Created for the Metadata File Import process. Not applicable for user-initiated request. This property allows the user to include the vary by cube

		type information in the import source file.
TimeVal	Time	Created for the Metadata File Import process. Not applicable for user-initiated requests. This property allows the user to include the vary by time value information in the import source file.
RelationshipScenarioType	Scenario Type	Created for the Metadata File Import process. Not applicable for user-initiated requests. This property allows users to include the relationship vary by scenario type information in the import source file.
RelationshipTimeVal	Time	Created for the Metadata File Import process. Not applicable for user-initiated requests. This property allows users to include the relationship vary by time value information in the import source file.

Layouts

A layout is used to design the input form a user will leverage to enter details or to enrich a request during a change request process. A layout is required to create a **Request Profile** and layouts can vary by the different actions allowed in a request.

You can control a set of properties that are allowed to be updated, set required fields, or apply validations to the properties in a layout. A different layout can be created and assigned to different steps and actions in a Request Profile to control who can update what properties.

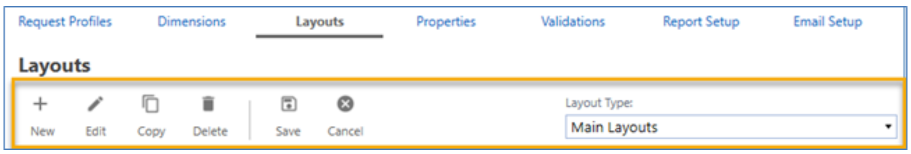
For example:

- For a requester creating a new account (**Add** action), the layout may contain most of the basic properties, but for copying an account (**Copy** action), you may create a different layout that only needs the Name and Parent name.

- For an Enricher, a layout may contain additional properties such as Text1 field where a requester will not have visibility into.
- For an Approval, a layout may be entirely read-only to control data integrity.

In the examples above, four separate layouts would be created to support the process.

Layouts Toolbar



New: Create a new layout. This will bring up the Layouts editing page.

Edit: Select a layout and click **Edit** to modify. This will bring up the Layouts editing page.

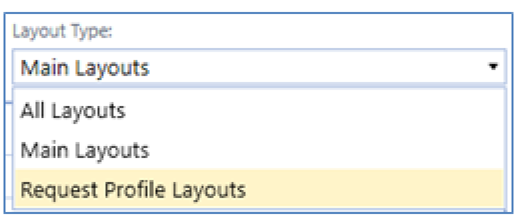
Copy: Select an existing layout to copy. This will bring you to the editing page where you will provide a unique description.

Delete: Select an existing layout to delete. A layout cannot be deleted if there is an associated request. It is not recommended to delete the OneStream pre-installed layouts. There is no risk in leaving the layouts in the list for potential future use.

Save: Save changes made in the grid.

Cancel: Cancel all changes made directly in the grid since the last save.

Layout Type: There are two types of layouts:



- **Main Layouts**: This is the layout a user will use as the main input form. When you create a new layout, it will automatically be labeled as a main layout.

- **Request Profile Layouts**: Prefixed with FV_ and is automatically created when a new Request Profile is created. Refer to the Request Profile Layouts (FV_) section for more information.

Default Layouts for Metadata File Import

Application Control Manager is pre-installed with a set of default layouts specifically to support the Metadata File Import process. Each layout contains the standard OneStream properties relevant to the dimension, as well as additional custom properties to support varying member properties.

SeeOneStream Design and Reference > Cube > Dimensions for varying properties descriptions.

> **CAUTION:** It is not recommended that you update or delete the default layouts. If you edit the default layouts, you will also need to update the Metadata File Import Data Sources connectors. See Define Metadata Import Properties for information on customizing the import process.

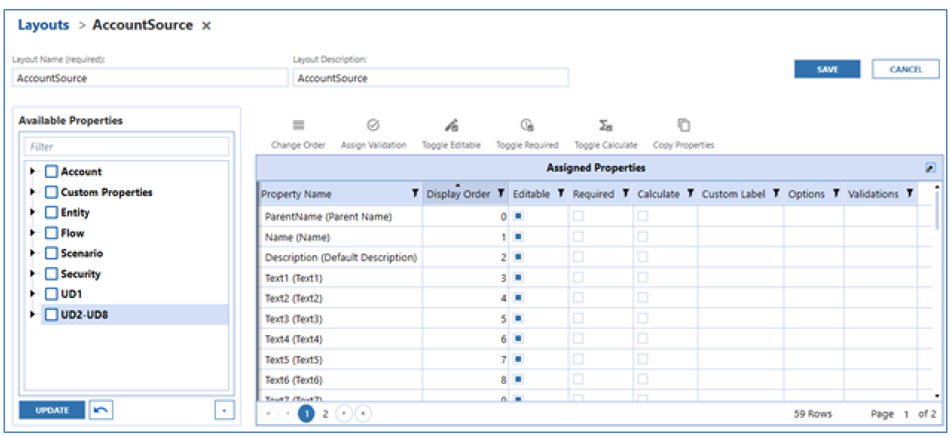
The following are the default layouts that are pre-installed in the application:

- AccountSource
- EntitySource
- FlowSource
- ScenarioSource
- UD1Source
- UD2Source
- UD3Source
- UD4Source
- UD5Source
- UD6Source
- UD7Source
- UD8Source

Layout Name	Description
AccountSource	AccountSource
EntitySource	EntitySource
FlowSource	FlowSource
ScenarioSource	ScenarioSource
UD1Source	UD1Source
UD2Source	UD2Source
UD3Source	UD3Source
UD4Source	UD4Source
UD5Source	UD5Source
UD6Source	UD6Source
UD7Source	UD7Source
UD8Source	UD8Source

Layouts Editing Page

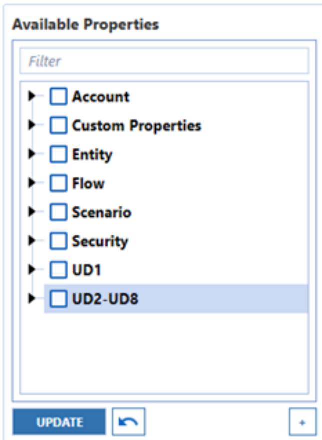
This page is accessible when you click the **New**, **Edit**, or **Copy** icons on the Layouts page.



Layout Name (required): Provide a unique layout name. No duplications are allowed.

Layout Description: This is what will show in the Request Profile when assigning a layout to an action. Description length cannot exceed 250 characters.

Available Properties: All the properties from the Properties page will be displayed in the Available Properties pane organized by dimension types.



- **Filter**: Properties are categorized by dimension type. Use the Filter function to instantly search for a property.
- **Update Button**: After selecting the properties by selecting the checkbox, click on the **Update** button to move the selected properties to the **Assigned Properties** grid.
- **Reset Property Selection**: Undo the checkbox selections in the **Available Properties** pane. This does not unassign or change the **Assigned Properties** grid.
- **Create New Custom Property**: This will bring up the property editing page that allows you to create a new custom property. The new property will be available for selection immediately and will automatically be added in the Properties page.

Assigned Properties Grid: The main control of what and how a user can interact with each property assigned in the layout.

Assigned Properties

Property Name	Display Order	Editable	Required	Calculate	Custom Label	Options	Validations
ParentName (Parent Name)	0	■	☐	☐			
Name (Name)	1	■	☐	☐			
Description (Default Description)	2	■	☐	☐			MaxLength20

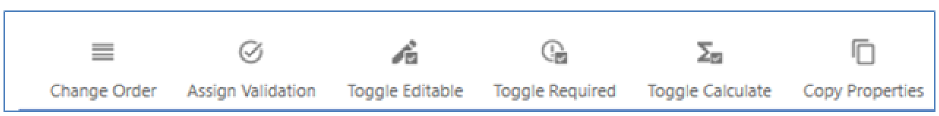
Property Name: Use the **Available Properties** pane to assign properties here. In the Metadata File Import Process, this property name must match the Business Rule connector field for the import to run correctly.

Display Order: The order of properties displayed in the layout. In the Metadata File Import process, this display order must match the Business Rule connector field in order for the import to run correctly. Duplication in display order will cause an error when processing the file import.

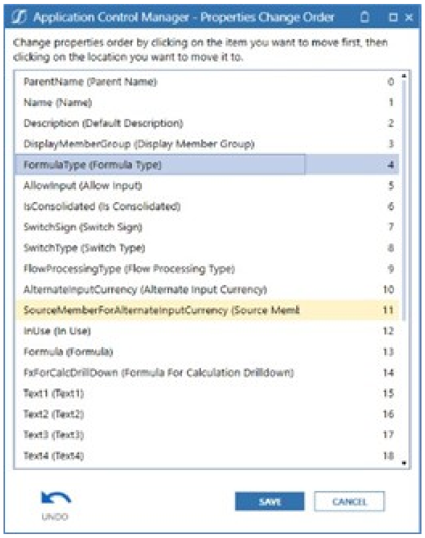
The following options are only applicable to user-initiated requests. They do not apply to the Metadata File Import process.

- **Editable**: Indicates whether the property can be edited during the request process.
- **Required**: Indicates if the property is required. When set to **True**, users will not be able to save the line item if the property is left blank.
- **Calculate**: Indicates if the property is calculated based on another property. Typically, this is used in conjunction with a Reference property. For example, referencing another Account when creating a new account, you may want to make Account Type as a calculate field to copy the same account type as the member being referenced.
- **Custom Label**: Overrides the property label.
- **Options**: Advanced options are used to allow passing of parameters to set a property as a reference property or set the property tooltip.
- **Validations**: Use the **Assign Validation** button to assign a validation to the property. A property can have multiple validations assigned to it. Assigned validations will be displayed in this column separated by a comma delimiter. In the Request Profile, a validation will run on a saved line item or on demand by clicking the **Validate** button.

Assigned Properties Toolbar



Change Order: Click this button to access the change order editing page.

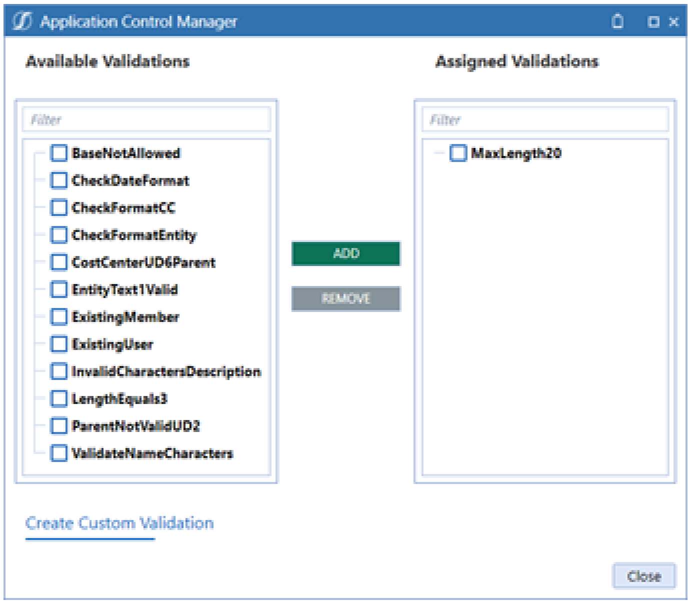


To change the order of the properties:

- Select the property to move.
- Select the property you would like to move it above.
- Click **Save**.
- Click the **Undo** icon to revert the last action.
- Click the **Cancel** button to close the assignment window.

  The Change Order column in the Assigned Properties grid will automatically update with the new order.

Assign Validation: Click this button to view the validation assignment window.



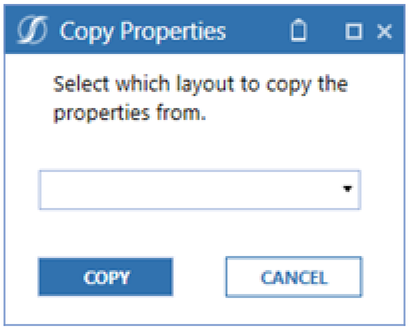
- **Available Validations** displays the pre-installed and custom validations available.
- Filter allows searching for a validation by name.
- Select one or more validations and click the **Add** button to move them to **Assigned Validations**.
- Click the **Remove** button to unassign validations.
- Click **Create Custom Validation** to create a new validation from this pane.

Toggle Editable: This will either select all or clear all checkboxes in the **Editable** column in the Assigned Properties grid. After you click this button, all previous selections you have made in the grid will be overwritten and cannot be undone.

Toggle Required: This will either select all or clear all checkboxes in the **Required** column in the Assigned Properties grid. After you click this button, any previous selections you have made in the grid will be overwritten and cannot be undone.

Toggle Calculate: This will either select all or clear all checkboxes in the **Calculate** column in the Assigned Properties grid. Clicking this will overwrite any previous selections, which cannot be undone.

Copy Properties: Use this button to quickly copy all the properties from an existing layout. Once you select which layout to copy the properties from, properties you have previously assigned in the grid will be overwritten and cannot be undone.



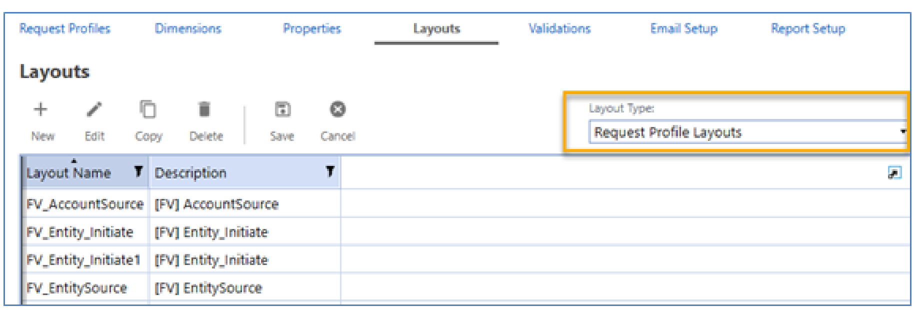
Request Profile Layouts (FV_)

Some users may want to capture information about a request as a whole (request level) versus at the individual line-item level. For example, information retrieved from a request level may be the **Request Priority** or **Business Justification** for submitting the request.

Application Control Manager can assist in this situation. When a **Request Profile** is created, the application automatically creates a corresponding Layout for it. The layout is saved as Request Profile Layouts type and is named with a prefix of FV_ followed by the Request Profile's name.

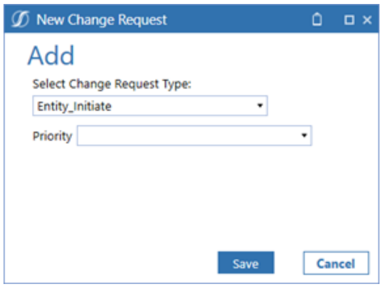
For example, if the Request Profile name is Entity_Initiate1, then the layout will be named FV_ Entity_Initiate1.

To access these layouts, navigate to Layouts page then select **Request Profiles Layouts** from the Layout Type filter.



Continuing with the earlier example, to capture the Priority of a request, first create a custom property in the **Properties** page. Then navigate back to Layouts page, select Request Profile Layouts from the filter, then select **Edit** to bring up the Layout editing page where you can then assign a custom property. Only Custom properties should be used as the request level.

Properties assigned to the Request Profile Layouts level will appear after you select the Request Profile and click **Create** from the home page.



Validations

Validations are a set of rules that can be applied to a property to ensure data integrity. For example, descriptions can be set to not exceed a certain number of characters, or a particular date format can be set. Validations are optional and are not required to complete a Request Profile.

> **NOTE:** Validations do not work on the initiate step in the Metadata File Import process. They are only applicable to user-initiated requests. However, they can be part of a following layout profile for Metadata File Import.

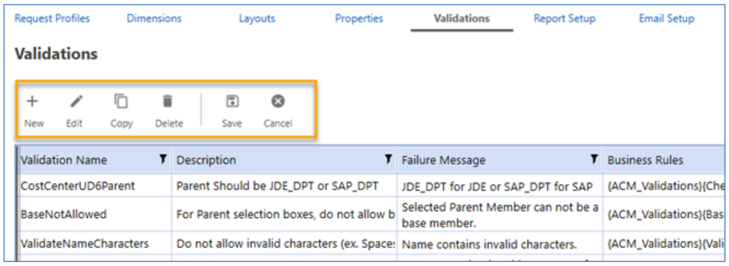
Validations will run when you save the line-items, or when you click the **Validate** button.

Application Control Manager is pre-installed with the following default validations.

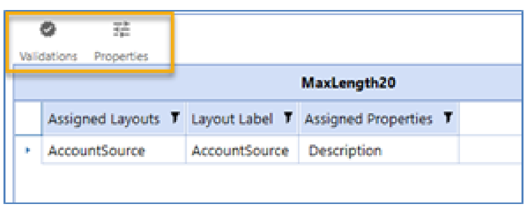
	Validation Name	Description	Failure Message	Business Rules
1	CostCenterUD6Parent	Parent Should be JDE_DPT or SAP_DPT	JDE_DPT for JDE or SAP_DPT for SAP	{ACM_Validations}{CheckFormat}{Di
2	BaseNotAllowed	For Parent selection boxes, do not allow base members.	Selected Parent Member can not be a base member.	{ACM_Validations}{BaseNotAllowed}
3	ValidateNameCharacters	Do not allow invalid characters (ex. Spaces in names, any system restriction, etc.)	Name contains invalid characters.	{ACM_Validations}{ValidateNameCh
4	CheckFormatCC	Account base formatting: CC_JDE_, CC_SAP_	Name must begin with: CC_JDE_ for JDE or CC_SAP_ for SAP	{ACM_Validations}{CheckFormat}{Di
5	ExistingUser	Check if User already exists	User with this Name already exists	{ACM_Validations}{CheckUserExists}
6	InvalidCharactersDescription	Check for Invalid Characters	Description contains invalid characters	{ACM_Validations}{InvalidCharacters
7	CheckFormatEntity	Entity base formatting: ENT_	Name must begin with ENT_	{ACM_Validations}{CheckFormat}{Di
8	EntityText1Valid	Text 1 Options: JDE, OTH or SAP	Text 1 must be JDE, OTH or SAP depending on Cube	{ACM_Validations}{CheckFormat}{Di
9	ParentNotValidUD2	For Parent UD2 selection boxes, do not allow PC_, PBU_, or OTH_ members as a parent.	Selected Parent Member can not be a base member. (PC_, PBU_, or OTH_ members not allowed as parents)	{ACM_Validations}{ParentNotValid}{
10	CheckDateFormat	Make sure text is a Date	Please enter Active Date in "DD/MM/YYYY" Format	{ACM_Validations}{CheckFormat}{Fo
11	MaxLength20	Max Length	Must be 20 characters or less	{ACM_Validations}{CheckFormat}{Ma
12	LengthEquals3	Length Restriction	Must be 3 characters long	{ACM_Validations}{CheckFormat}{Le
13	ExistingMember	Check if Member already exists	Member with this Name already exists	{ACM_Validations}{CheckMemberExi

You can also create custom validations.

Validations Toolbar



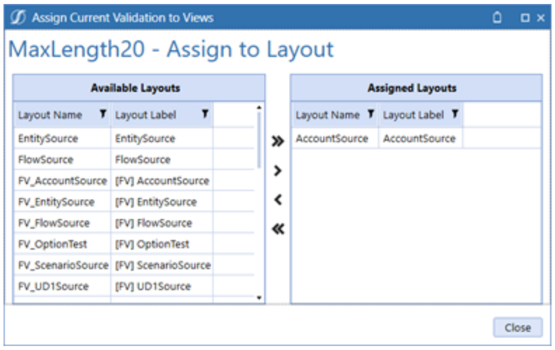
- **New**: Create a new validation. This will bring up the Validation editing page.
- **Edit**: Select a validation and click **Edit** to modify. This will bring up the Validation editing page.
- **Copy**: Select an existing layout to copy. This will bring up the editing page to allow for a unique description to be provided.
- **Delete**: Choose an existing validation to delete.
- **Save**: Save changes made in the grid.
- **Cancel**: Cancel all changes made in the grid since the last save.



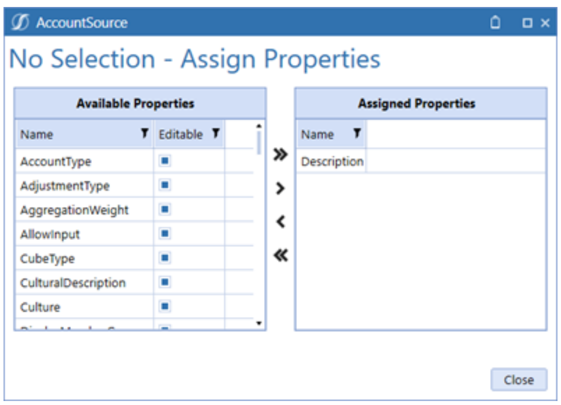
Use the Validations and Properties buttons to select an existing layout and assign the validation to one or multiple properties assigned to the selected layout.

> **NOTE:** You must first select a layout by clicking the **Validations** button before clicking the **Properties** button.

Validations: This allows you to select an existing layout and assign a validation. First select the desired validation, then click on this button to display the assignment window.

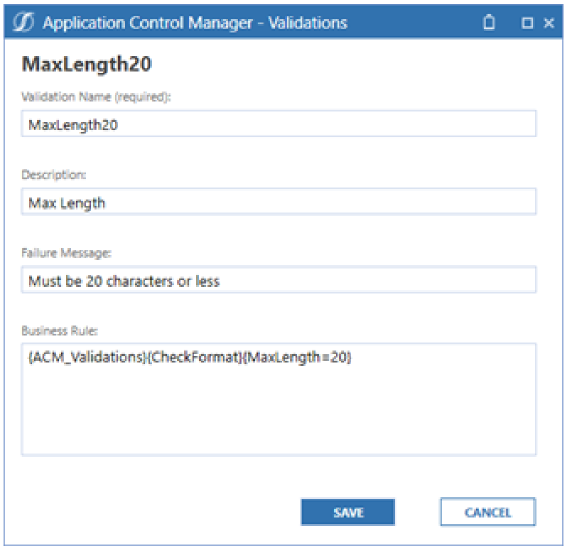


Properties: Select a layout before clicking this button. This displays a window with the assigned properties for the selected layout.



Validations Grid and Editing Page

Some fields can be edited directly on the Validations page grid or by using the editing page. This page is accessible when you select **New**, **Edit**, or **Copy**.



Validation Name (required): Choose a unique name for the validation. Duplication is not allowed.

Description: Enter a description of the validation. Description length cannot exceed 250 characters.

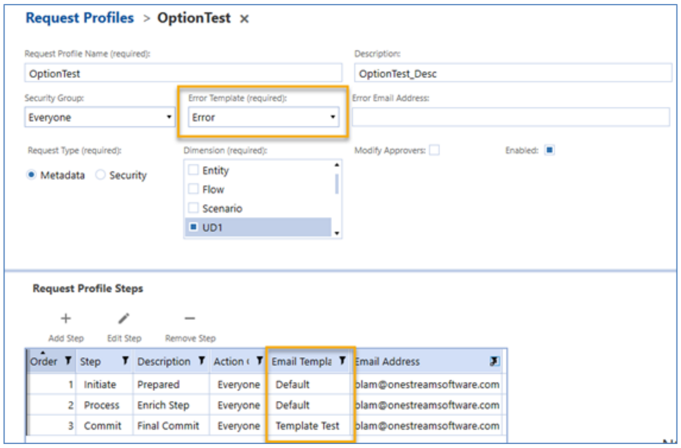
Failure Message: This is the message users will receive when the validation is triggered.

Business Rule: Enter the rules and parameters for the validation. All validation rules are stored in the ACM_Validations.cs assembly within workspaces.

> **IMPORTANT:** When creating a custom validation rule, ensure the parameters are added to the ACM_Validations business rule, which is unencrypted. Using another business rule is not supported at this stage.

Email Setup

Email can be used to notify users of the status of a request or notify the application admin when there is failure in a process. An email template is required to complete a Request Profile. You can elect not to use email notification by leaving the email addresses blank.

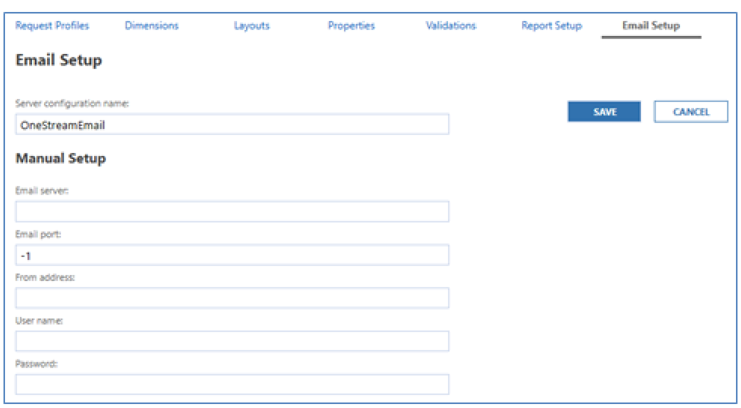


- **Error Email Template (required)**: Email template sent out when there is an error running the request profile.
- **Email Template**: After a request is submitted, this is the email template sent to the specified email addresses.

Email Server Setup

Define the email server that should be used to send out email notifications from the application.

The server name is pre-populated with OnestreamEmail server. Choose this or enter your own server name and click **Save** to register it in the application.



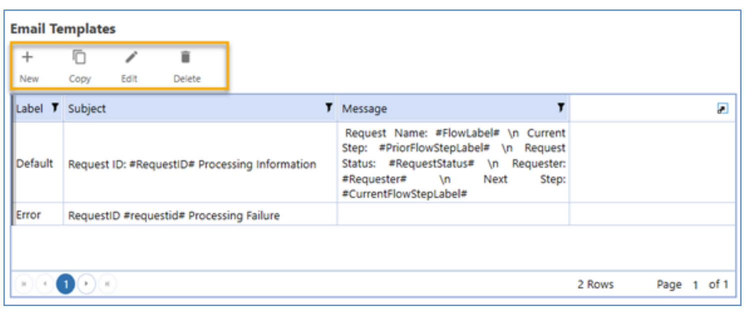
- **Server Configuration name**: Specify the email server account to send notifications from Application Control Manager

- **Manual Setup**: Alternatively, you can manually input the configuration to setup the server.
  - **Email server**: Name matching the email server setup in the OneStream Server Configuration
  - **Email port**: Email port that is setup in the server configuration
  - **From address**: The address the application will use to send out the email
  - **User name**: User name for the email account used above
  - **Password**: Password for the email account used above

Email Templates

You can set up a different email template to use at different stages in a request. For example, a template can contain next step information to notify users of a pending request. An email template could notify users when a request has been committed.

Two defaults email templates are pre-installed with the application: Error and Default templates. You can edit these default templates or create new templates using the available placeholders from the application.



Email Templates Toolbar

New: Create a new template. This will bring up the email template editing page.

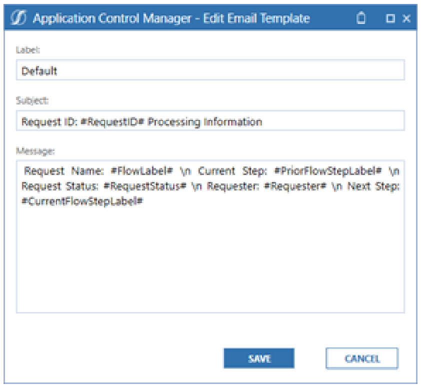
Copy: Select an existing template to copy. This will bring you to the editing page, where you will provide a unique description.

Edit: Select an existing template and click **Edit** to modify. This will bring up the email template editing page.

Delete: Select an existing template to delete.

Email Template Editing Page

Some fields can be edited directly on the Email Templates grid or by using the editing page. This page is accessible when you select **New**, **Edit**, or **Copy** on the Email Setup page.



- **Label**: A unique name for the email template. No duplication is allowed.
- **Subject**: Description that will show up in the subject line of the email.
- **Message**: The message that will show up in the email body. This can be customized by using the placeholder options below.

Email Placeholder Options

Using the email placeholder and the escape sequences below, you can customize an email template for use in different steps in the request.

For example, type in the content you would like to see in the body of the email, like **Request Name:**. Then specify the placeholder and enclose it with **#** signs, like #FlowLabel#. Enter **\n** to insert a line break.

Below are the available placeholder options:

- **FlowName**: Request profile name
- **FlowType**: Type of request, either metadata or security type
- **FlowLabel**: Request profile description
- **FlowStepLabel**: Current request profile step description

- **PriorFlowStepLabel**: Previous request profile step description
- **FlowStepType**: Current request profile step type
- **Message**: Custom message
- **RequestID**: Request identification number
- **Requester**: Name of the person who created the request
- **RequestStatus**: Current status of the request
- **RequestNextAction**: Show if the request is claimed by someone

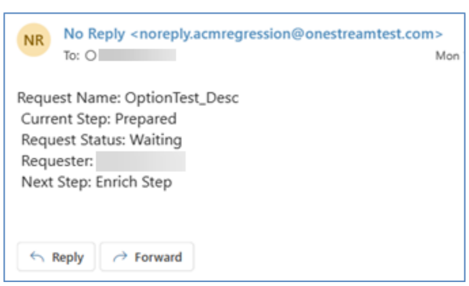
Escape sequence options:

- **\n**: newline
- **\"**: doublequote
- **\r**: carriage return
- **\t**: tab

The Default email template is prefilled with the below placeholders as an example of how to format the message:

Request Name: #FlowLabel# \n Current Step: #PriorFlowStepLabel# \n Request Status: #RequestStatus# \n Requester: #Requester# \n Next Step: #CurrentFlowStepLabel#

The resulting email with these placeholders would look like this:

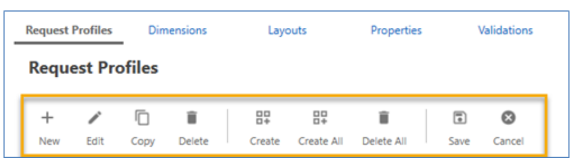


Request Profiles

Request Profiles represent the entire approval process a user completes when creating a new request. When a requester wants to start a change request, they must first select a request profile. A request profile controls the following elements in a change request process:

- Which dimension and hierarchy can be changed. This is defined in the Dimensions page.
- What approval or enrichment steps are required
- Who can have access to each step
- What email notification should be sent out for each step. This is setup in the Email Setup page.
- What actions (Add, Copy, Update, etc.) are allowed to be performed on the dimension
- Which properties can be changed. This is defined in the Layouts page.

Request Profiles Toolbar



New: Create a new profile. This will bring up the Request Profile editing page, allowing you to enter details.

Edit: Select a profile and click **Edit** to modify. If a Request Profile has an associated open request, you will receive a prompt asking if you would like to close out the request before proceeding.

Copy: Select an existing profile to copy. This will bring you to the editing page where you will be required to provide a unique description.

Delete: Select an existing profile to delete. Ensure there are no associated, open, or completed requests to prevent the audit trail from being deleted.

Create: Create dynamic dashboard components for the selected Request Profile. Every time there is a change in a profile, you must click **Create** to regenerate the dynamic dashboard.

Create All: Create dynamic dashboard components for all Request Profiles.

Delete All: Delete all dynamic dashboard components for all Request Profiles. This only deletes the underlying dynamic dashboards, not the Request Profile.

Save: Save changes made in the grid.

Cancel: Cancel all changes made directly in the grid since the last save.

> **IMPORTANT:** The dynamic dashboards are created in a specific Maintenance Unit named Application Control Manager Dynamic Dashboards (ACM). Do not make updates to the Dashboard there. Any changes will be overwritten when the Create process is run. Only make updates using the Request Profile editing page.

Default Request Profiles for Metadata File Import

Application Control Manager is pre-installed with a set of default Request Profiles specifically to support the Metadata File Import process. Each profile is set with the following configurations:

- Dimension is set to the same dimension as the profile name. For example, Entity is selected for the EntitySource request profile name.
- The Initiate and Commit steps
- The Action Group for each step is set to Everyone
- Email Template is set to the pre-installed templates, the Error and Default templates.
- Actions (Add, Copy, Update, Move, Remove) are turned on with the pre-installed layouts.

> **CAUTION:** We do not recommended you update or delete the default Request Profiles. If you edit the default profiles, make sure to update the Data Source and supply the new Request Profile names for the default Metadata File Import to run correctly. Deleting the default profiles may cause import errors.

See Define Metadata Import Properties for more information on customizing the import process.

The following are the default layouts that are pre-installed in the application:

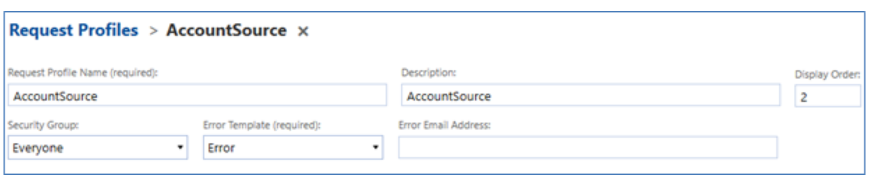
- EntitySource
- AccountSource
- UD1Source
- UD2Source

- UD3Source
- UD4Source
- UD5Source
- UD6Source
- UD7Source
- UD8Source
- FlowSource
- ScenarioSource

Display Order	Name	Description	Request Type	Security Group	Enabled
1	EntitySource	EntitySource	Metadata	Everyone	
2	AccountSource	AccountSource	Metadata	Everyone	
3	UD1Source	UD1Source	Metadata	Everyone	
4	UD2Source	UD2Source	Metadata	Everyone	
5	UD3Source	UD3Source	Metadata	Everyone	
6	UD4Source	UD4Source	Metadata	Everyone	
7	UD5Source	UD5Source	Metadata	Everyone	
8	UD6Source	UD6Source	Metadata	Everyone	
9	UD7Source	UD7Source	Metadata	Everyone	
10	UD8Source	UD8Source	Metadata	Everyone	
11	FlowSource	FlowSource	Metadata	Everyone	
12	ScenarioSource	ScenarioSource	Metadata	Everyone	

Request Profiles Editing Page

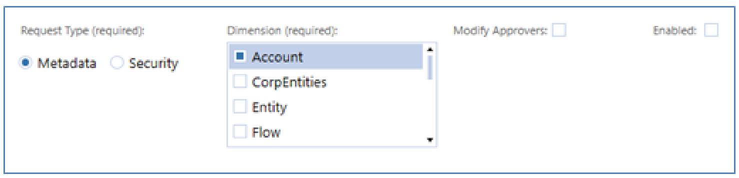
This page is accessible when you click the New, Edit, or Copy icons on the Request Profile page.



General Request Profiles Information

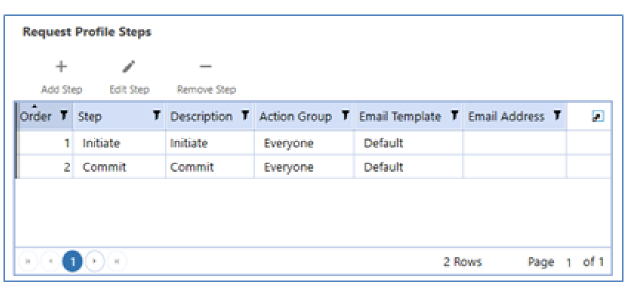
- **Request Profile Name (required)**: Unique name for the profile
- **Description**: Description users see when creating a request

- **Display Order**: Order in which the request will display for user selection
- **Security Group**: Indicates who can manage the Request Profile
- **Error Email Template (required)**: Email template sent out for errors relating to the Request Profile
- **Error Email Address**: Email address receiving the profile error email, usually the application administrator group. Input the full email address such as admin@onestream.com.



Request Type

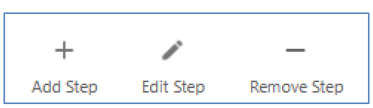
- **Request Type(required)**: Specify if the profile is for Metadata or Security updates. Depending on the selected type, different actions will be available (Add, Copy, Update, Move, Remove, and Delete for Metadata. Add, Update, and Remove for Security).
- **Dimension (required)**: Indicates which dimensions the request can update. You will select the Dimension Description as defined in the Dimensions creation step above. You can also select multiple dimensions and use the Grouped Dimensions functionality. See Setup and Use Grouped Dimensions. This will appear after selecting Metadata under Request Type and saving.
- **Modify Approvers**: Determines if the Approvers icon will be visible to users on the Request page. Enabling this features will bypass the security action group specified in the steps. See Use Modify Approvers for more information.
- **Enabled**: Determines if the request profile is visible to the user.



Steps

- **Order**: Indicates the stages the request will go through. Minimally you need the Initiate and Commit steps in order for a request to be created and committed correctly. Step orders must be sequential and cannot be duplicated.
- **Step**: The application is setup to support five step types. You can have multiple Process steps, but should only have one Initiate and Commit step.
    - **Initiate**: First step in creating a request. This step cannot be deleted.
    - **Process**: Additional processing steps to support the request. For example, for approval, enrichment, or review.
    - **Commit**: Makes the updates to the OneStream Dimension Library.
    - **Migrate**: Migrate requests to the target environment based on the setup in Global Options. A target environment is required to save this step correctly.
    - **Export**: Export Requests to the target folder based on the setup in Exports > Export Request. An Export Group selection is required to save this step correctly.
- **Description**: Give a description of the purpose of each step.
- **Action Group**: Specify which users have access at each step.
- **Email Template**: Select the email template for email notification. Email templates are setup on the Email Setup page.
- **Email Address**: Email group to be notified when the request has reached their assigned step. Input the full email address such as ABC@onestream.com.

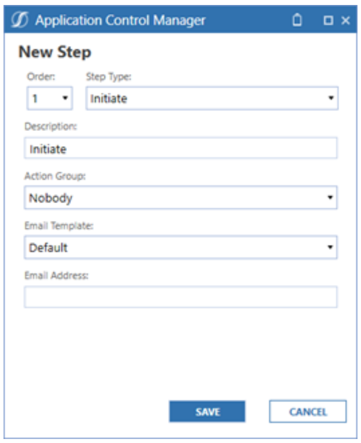
Use the toolbar and step editing page to manage the steps in the request profile.

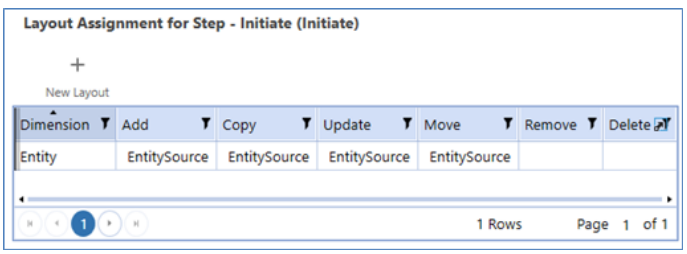


- **Add Step**: This will bring up the step editing page. The next number is automatically populated.

- **Edit Step**: This will bring up the step editing page and the selected step information will be displayed on the page.

- **Remove Step**: Select the step you would like to delete, then click on the **Remove Step** icon. You cannot delete a Initiate step.





Layout Assignment Actions

Determine what actions a user can submit in a request by assigning a layout to it in order to activate it. For example, to allow Adding of a new account, assign an Account layout to the **Add** column. Or to prevent user from removing an Entity, leave the **Remove** column blank to turn the action off.

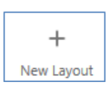
Only the Initiate and Process steps need to have layout assignments for actions.

- **Dimension**: Auto-populated based on the Dimension selection.
- **Actions**: There are six available actions in the application. Action types will only be processed if a Layout is assigned.
    - **Add**: Create a new member
    - **Copy**: Copy a member and it's relationships
    - **Update**: Change the property value of a member
    - **Move**: Move a member to a new parent. This will remove the member from their current relationship.
    - **Remove**: Remove the current relationship of a member without moving them to a new one. If the Member is no longer a part of the Dimension structure, it will be placed under Orphans.
    - **Delete**: Delete a member. Members that have underlying stored data (such as Actual amount or Budget data) cannot be deleted.

As you select the Request Profile type, you will see the available actions in the Layout Assignment grid.

For Metadata the available actions are: Add, Copy, Update, Move, Remove, and Delete.

For User Security the available actions are: Add, Update, and Remove.



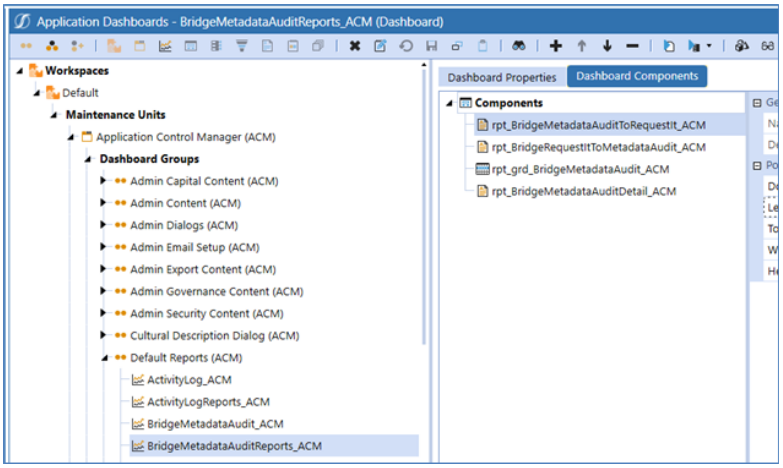
Click on the **New Layout** icon to bring up the Layout editing page and create a new layout without leaving the page.

> **IMPORTANT:** After creating the Request Profile, or anytime after modifying profile options, you must return to the Request Profile Summary page to run the create dashboard process.

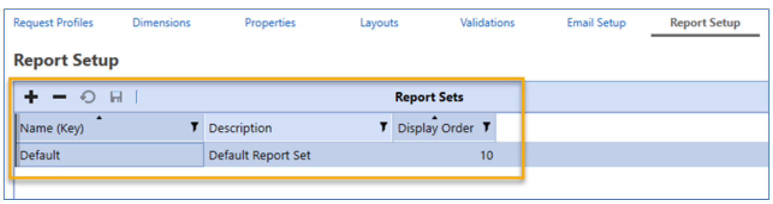
Report Setup

Defaults reports are pre-installed with the application. You can also create custom reports. All custom reports should first be created in the application dashboard group below:

Application > **Presentation** > **Dashboards** > **Application Control Manager (ACM)**



After the custom report dashboard has been added, you can then set up the report sets and assign security to the report.



Report Sets

Report sets contain a group of individual reports. The pre-installed reports are grouped in the **Default** report set.

- ➕: Add a new report set.
- ➖: Delete a selected report set.
- : Undo unsaved changes.
- : Save changes to the report sets.

Reports

When you click on a report set, the lower pane opens where you can add and manage individual reports.

Default Reports

Name (Key)	Display Name	Enabled	Display Order	Security Group	Dashboard Name
MetadataBridge	Metadata Bridge Report	■	10	Everyone	BridgeMetadataAudit_ACM
RequestAudit	Request Audit	■	100	Everyone	RequestAudit_ACM
RequestAuditByType	Request Audit By Request	■	110	Everyone	RequestByTypeAudit_ACM
RequestAuditByStatus	Request Audit By Status	■	120	Everyone	RequestByStatusAudit_ACM
RequestAuditByStep	Request Audit By Step Typ	■	130	Everyone	RequestByStepType_ACM
RequestAuditWithItem	Request Audit with Item D	□	200	Everyone	RequestWithItemDetailAudit_ACM
RequestAutoItemDetail	Automated Request Audit	■	210	Everyone	RequestAutoItemDetail_ACM
MetadataDetailAudit	Metadata Detail Audit	□	500	Everyone	MetadataDetailAudit_ACM
ActivityLogAudit	Request Activity Audit	■	1000	Everyone	ActivityLog_ACM

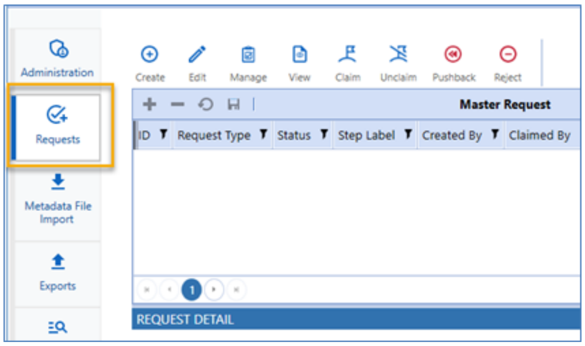
- : Add a report to the set.
- : Delete a selected report from the set.
- : Undo unsaved changes.
- : Save changes to the report.

The report table has the following columns:

- **Name (Key)**: Unique name for the report.
- **Display Name**: The name of the report displayed to the end user.
- **Enabled**: Determines if the report in the set can be seen by the end user.
- **Display Order**: Arranges reports in numerical order.
- **Security Group**: Assigns the OneStream security group that can view this report.
- **Dashboard Name**: Name of the report dashboard in Application Control Manager. Custom reports must first be created in the **Application** > **Presentation** > **Dashboards** > **Application Control Manager (ACM)**.

Requests Home Page

Any user with access to create a request will go to the Requests Home Page to start the process. A user that needs to approve or enrich a request will also go to this page for processing. This page is accessible from the left navigation panel on the left-hand side of the application.

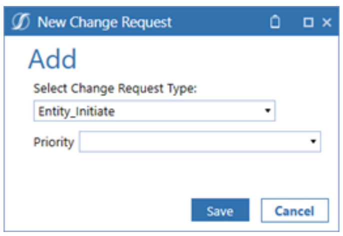


A typical flow for a user-initiate request often follows the steps below:

1. Click on the **Create** button from the home page.
2. A window with the Request Profile drop-down will appear. Users will only see the profile that they have access to. Select a profile and, if applicable, the Request Profile level properties will appear for the user to enter.
3. Next, the user will be brought to the **Request Detail** page.
4. Click **Add** to start adding line items to the request.
5. Select the actions from the drop-down.
6. In the **Item Detail** section, the properties or layout that are assigned to the action will show up.
7. Users will enter the necessary information and click on **Save**. If applicable, the validations that are triggered will show an error message at this time.
8. After clicking on Save, the line item grid will be refreshed.
9. Users can continue to add items or click on **Submit**.

Request Toolbar

- **Create**: Create a new request. A window will open for users to select a Request Profile that is enabled and they have access to. Any properties that are assigned to the Request Profile Layout will also appear in this window. After clicking **Save**, it will bring you to the request detail page.



- **Edit**: Update an existing request. Once a request has been submitted to the next step, the requester will not be able to edit the request.

- **Manage**: Brings users to the request detail page. A user cannot manage a request that was initiated by them.

- **View**: To view an existing request in a read-only state.

- **Claim**: Clicking on this icon will update the **Claimed By** column with the name of the user who claimed it. A user cannot claim a request that was initiated by them.

- **Unclaim**: Clicking on this icon will update the **Claimed By** column with Unclaimed. See the request Filters section below for more information.

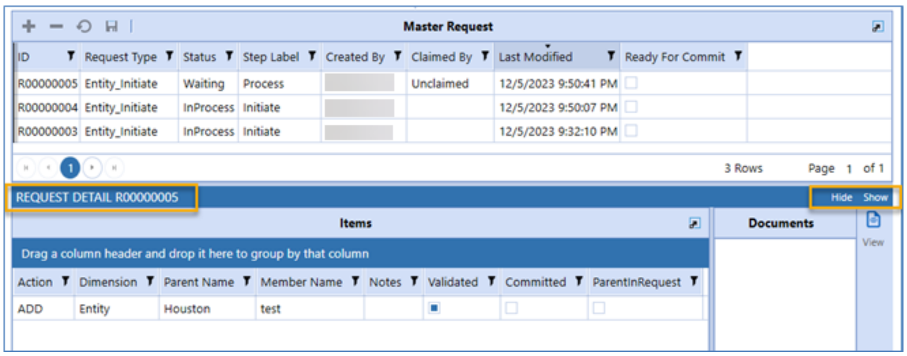
- **Pushback**: Sends the request back to the previous step.

- **Reject**: Reject and close out the request. A comment window will display. A comment is optional to close the request.

- **Commit**: This will commit requests that have **Ready for Commit** check boxes set as True. When there is no available request to be committed, this icon will be hidden.

Master Request and Items Grid

The Master Request Grid displays summarized information about the request. It does not show you each line item that is within the request. To view the line item details, you can expand the Request Detail underneath the grid by selecting the **Show** button on the right-hand side of the window.



Master Request Grid

- **ID**: System generated identification number for the request
- **Request Type**: Show the Request Profile descriptions
- **Status**: The current status of the request. Available statuses are:
  - **InProcess**: Applies to request that has been initiated or claimed
  - **Waiting**: Submitted by prior step and is now pending next step action
  - **Closed**: Closed without being committed. Usually it is either rejected or closed by system
  - **Completed**: Ran through the commit step
  - **FailedCommit**: Ran through the commit step but there are line items that failed

- **AwaitingApproval**: This status will only appear if additional approvers are added to the request using the **Modify Approvers** feature. Refer to Use Modify Approvers for more information.

- **Step Label**: Description of the step as set in the Request Profile
- **Created By**: Name of the user who created the request
- **Claimed By**: Name of the user who claimed the request. The default value for this is **Unclaimed**
- **Last Modified Date**: Time stamp indicating the last modification date and time
- **Ready for Commit**: Indicates if the request is ready to be committed. When a request reaches the Commit step, this column will automatically be set to **True**. Administrators can un-select the check box in the grid to set it to False.

Items Grid

REQUEST DETAIL R00000014

Items

Drag a column header and drop it here to group by that column

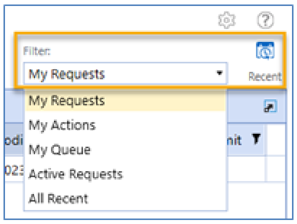
Item Group	SubItem	Action	Dimension	Parent Name	Member Name	Notes	Validated	Committed	ParentInRequest
GroupedTest	■	ADD	CorpEntities	Root	GroupedTest		■	☐	☐
GroupedTest	■	ADD	CostCenters	Root	GroupedTest		■	☐	☐

- **Item Group** (only shown if the request contains Grouped Dimensions item): Displays the member name in the request.
- **SubItem** (only shown if the request contains Grouped Dimensions item): Either True or False. This indicates if the item is a sub-item of a Grouped Item. Only valid on Grouped Request Types.
- **Action**: The metadata action to be performed.
- **Dimension**: OneStream dimension to be updated.
- **Parent Name**: OneStream parent member name.
- **Member Name**: OneStream member name.
- **Notes**: An input text field that is specific to the particular item.
- **Validated**: True/False, indicates if all item properties are validated.

- **Committed**: True/False, indicates if an item has been successfully committed.
- **Parent In Request**: True/False, indicates if the Parent is included in the request.

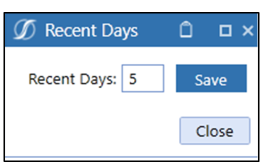
Request Filters

Use the request filters to quickly refresh the Master Request grid and display the relevant requests. There is an option for you to input how many days of requests to show in the grid.



- **My Requests**: Shows requests the current user has created.
- **My Actions**: Shows requests with pending actions for the current user.
- **My Queue**: Shows requests for the current user when their group has the next pending action (for example, Enrich group).
- **Active Requests**: Shows requests that are currently active (not in a closed, completed, or committed status).
- **All Recent**: Shows all requests in any state from recent days as configured in the next option.
- 

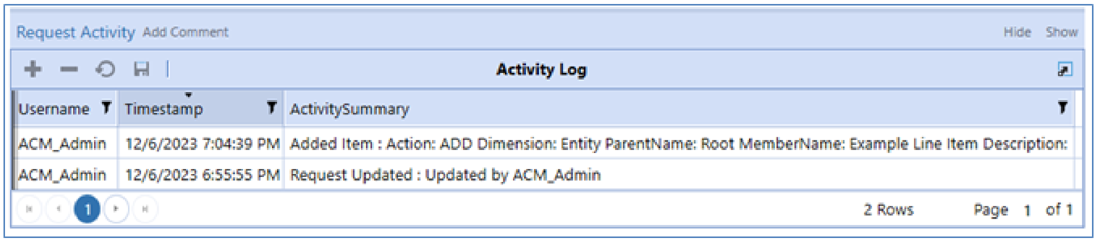
: Shows all requests in any state from recent days as configured in the next option.



Request Activity

The Request Activity grid is a read-only grid that can be found on the Request Home Page as well as in the Request Details Page.

The same activity entries are also stored in the application Logs table. Users have the option to expand or collapse the activity log grid by preference. Use the **Hide/Show** options located on the right-hand side of the window.



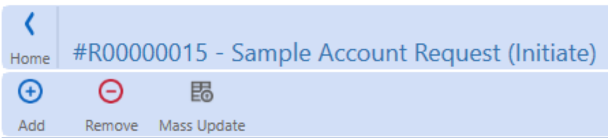
- **Username**: User performing listed task
- **Timestamp**: Time that the task was performed
- **Activity Summary**: A brief overview of the activity
- **Add Comment**: Add a comment to the request (not to individual line-items within the request) for further clarification

Requests Details Page

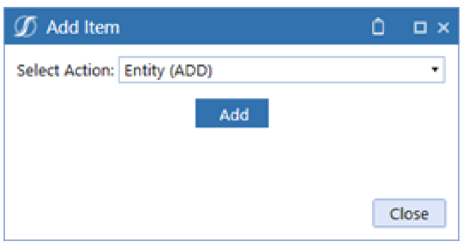
To create or manage a request, users will go to the Request Detail page. The Layout configured in the related Request Profile determines what properties will show up in the Item Detail section on this page. Below are the activities that a user can perform on this page:

- Add or delete items in the request. A request can contain multiple line items.
- Move a request forward or backward in the request flow
- Reject a request
- Validate items in a request
- Attach, delete, and download documents
- Add notes to the request
- View the Activity Log

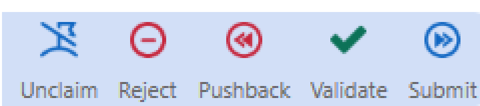
Manage Request Toolbar



- **Home**: Redirects to the Application Control Manager Master Request Home page.
- **Add**: Click here to start adding items to the request. A window will appear and all the allowable actions as defined in the Request Profile will be listed in the drop-down list.



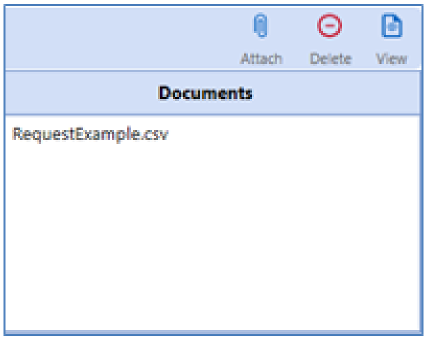
- **Remove**: Use this button to remove items from the request.
- Mass Update: Populates a OneStream spreadsheet that allows users to submit multiple item changes at one time. See Mass Update for a more detailed walkthrough of this feature.



- **Unclaim**: Puts the request back into the queue as Unclaimed for other approved users to claim and redirects back to the Application Control Manager Master Request Home page.
- **Reject**: Rejects and closes the current request. A window will open for you to input any comments prior to closing the request. You can no longer edit the request after this action.
- **Pushback**: Pushes the request back to the previous step in the request flow.
- **Validate**: Checks the validation status of all items in the current request.
- **Submit**: Moves the request to the next step in the request flow.

Attach Documents

Users can attach supporting documents as part of the change request process. Most commonly used file types are supported (xls, doc, pdf, png, zip) except for xml type.



- **Attach**: Click on attach to bring up the standard file browser window. Select the desired document and click **Open** to attach it in the application. Users can attach multiple documents.
- **Delete**: Use this button to delete the selected document(s).
- **View**: Select the document then click on View to open the file.

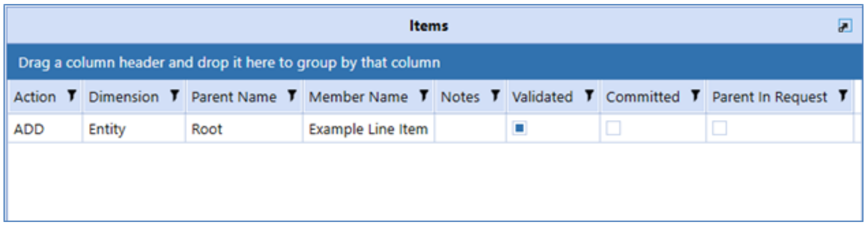
Item Detail

Line items and details in the request represent the members and actions that the user will be able to update. What kind of actions are allowed to be performed in a request is determined by the Request Profile.

Where applicable, a user can add multiple line items, or action types, within the same request. For example, you may have five new accounts and a couple Move members within the same request.

Items Grid

This is a read-only grid. After a user clicks on the **Save** button, the grid will be refreshed and show the line item details. The Items grid can display unlimited rows and also allows you to export the data by right-clicking within the grid.

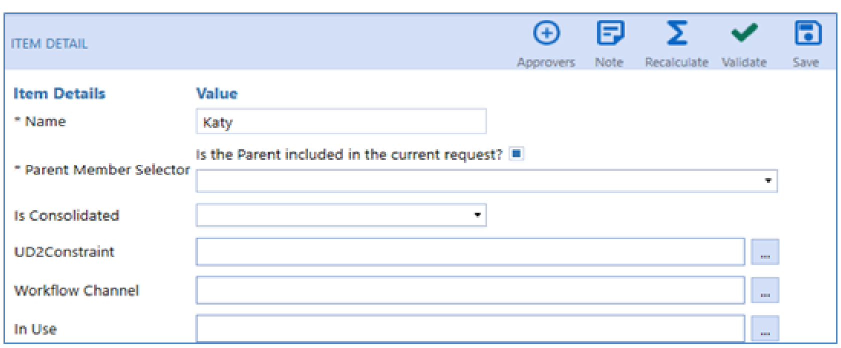


- **Action**: The metadata action to be performed
- **Dimension**: OneStream dimension to be updated
- **Parent Name**: OneStream parent member name
- **Member Name**: OneStream member name
- **Notes**: An input text field that is specific to the particular item
- **Validated**: True/False, indicates if all item properties are validated
- **Committed**: True/False, indicates if an item has been successfully committed
- **ParentInRequest**: True/False, indicates if the Parent is included in the request

Item Details and Toolbar

A layout determines what properties will show in the Item Detail dashboard. These dashboards are dynamically created when an Admin clicks on the **Create** button when setting up a Request Profile.

After updating properties in a layout, it is important to re-create the dynamic dashboard in order for the updated properties to appear in the Item Detail section.

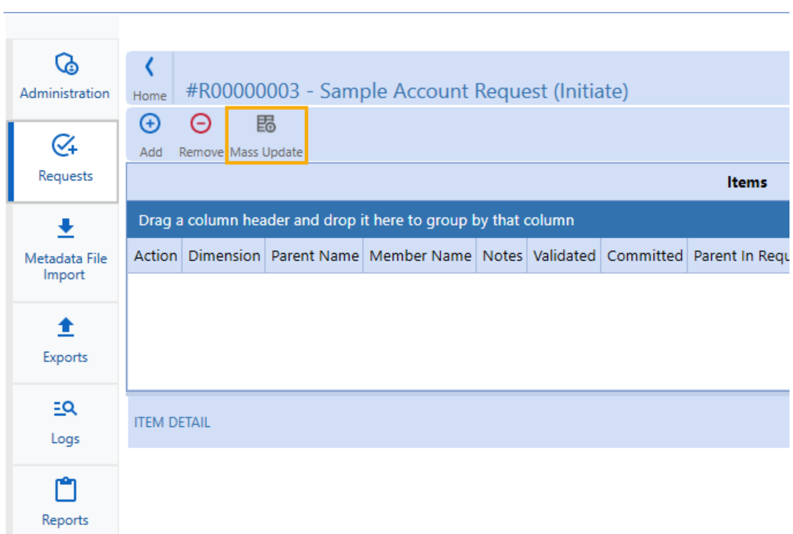


- **Approvers** (Only shown when Modify Approvers is turned on in the Request Profile): Add approvers to the request
- **Note**: Must first select a line item, and then a note can be entered
- **Recalculate**: Recalculates or refreshes the values for any calculated properties assigned to the layout
- **Validate**: Runs validations assigned to the current item
- **Save**: Saves the current item properties

Mass Update

The mass update feature enables you to enter multiple metadata or security items within a single request using the OneStream spreadsheet, rather than entering each change individually on the Request Details page. This provides you with multiple methods of adding and editing your request line-items, which can be particularly useful when many changes may need to be made at one time.

For a walk through of how to use this feature, see Use Mass Update.



Spreadsheet Generation

When you click the **Mass Update** button on the **Request Details** page, a spreadsheet will be dynamically generated and open within the OneStream application.

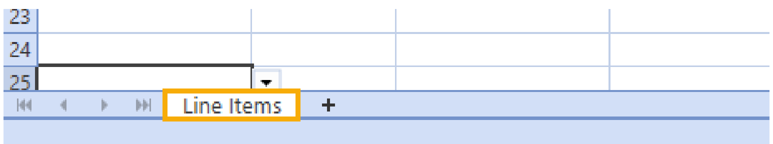
Temporary Spreadsheet

The temporary spreadsheet that populates is generated based on the line items in the request. One temporary file will be generated for each user when they open the Mass Update spreadsheet. This file can be found in the OneStream file explorer under **Documents** within the user's folder.

> **NOTE:** Since the file created is temporary, any formatting or additional tabs created on the spreadsheet will not be retained the next time the Mass Update spreadsheet is opened for the same request. To maintain formatting and use the spreadsheet for future requests, save the spreadsheet to your local device.

Line Items Tab

One tab will generate titled **Line Items**. This tab is required and should not be deleted or renamed.



Headers Row

The first header row, which is automatically generated, contains the properties that are assigned in the layouts for the request profile. Some fixed headers or properties appear in every spreadsheet. These properties do not need to be created or added to the layouts, they are generated automatically.

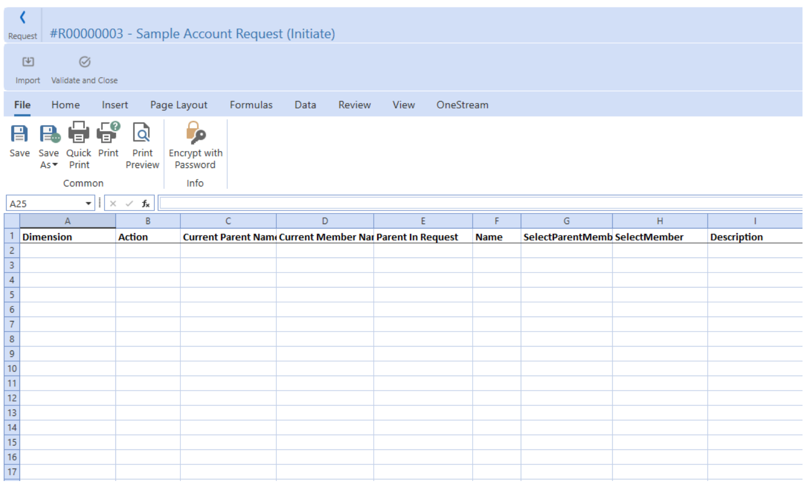
For Metadata request types, there are six fixed headers:

- **Dimension**: Drop-down list of dimension(s) that are assigned in the request profile
- **Actions**: Drop-down list of allowable actions in the request profile
- **Current Parent Name**: All actions except for adding a member require the current parent's name for the member
- **Current Member Name**: All actions except for adding a member require the current member's name

- **Parent In Request**: Indicate whether the parent for the member is being created within the current request
- **ItemID** (last column): This hidden column is for system use only. Do not populate or paste any values here.

For user security requests types, there are three fixed headers:

- **Action**: Drop-down list of allowable actions in the request profile
- **Current User Name**: Specify the user that you would like to take action on
- **ItemID** (last column): This hidden column is for system use only. Do not populate or paste any values here.



Properties in the Spreadsheet

Any custom properties assigned in the layout will be generated in the spreadsheet. Combo box type properties will also be created as a drop-down cell with the same pick list.

Some properties that contain secondary pop-up dialog windows, which are available when using the Request Details page, are not available in the spreadsheet. For example:

- Member or Parent selectors
- Copy from User feature for security access groups
- Varying member properties selector

Input Data

The main methods of entering data into a mass update spreadsheet include manual entry, copying and pasting data in the spreadsheet, or importing an outside Excel file.

With a range of Excel functionality available, additional tabs, formulas, formatting conventions, or filters can be used within the spreadsheet to better organize the incoming metadata. However, as a new spreadsheet is populated each time the mass update button is clicked, any additional features or formatting will not be saved. To save any formatting that has been added, use the **Save As** button to save the spreadsheet onto your local device. This formatted file can be imported for use in future mass updates.

Manual Entry

You can input data directly into the Mass Update spreadsheet by clicking into a cell. Once an action is selected from the **Actions** column, some cells will change to gray indicating that input is not necessary. For example, if **Add** is selected, the Current Parent Name and Current Member Name fields are not required.

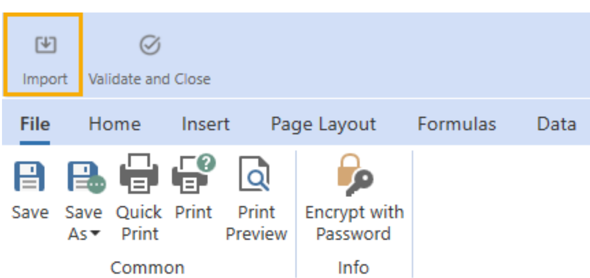
Copy and Paste Data

Mirroring Excel functionality, you can also edit the mass update spreadsheet by copying and pasting information from an outside Excel file or drag down data from one row to the next.

> **NOTE:** Remember not to copy and paste the **ItemID** column, which is for system use only.

Import Excel File

Excel files saved from past request spreadsheets, or those generated outside of the OneStream application, can be imported using the **Import** button within the Mass Update spreadsheet.



Excel files selected for import must feature one sheet titled Line Items. If this tab is not present or if it is not named Line Items, a dialog box will populate informing you that this tab must be present for import to succeed. The headers must also be an exact match to the headers generated by the Mass Update spreadsheet, including the fixed headers.

> **NOTE:** If you attempt to import a file while there are existing rows within your request, a dialog box will prompt you to either **Replace** or **Append** the existing records.

Enter Varying Member Properties

When using the Mass Update spreadsheet to enter changes for varying member properties, ensure that each varying item has a row in the spreadsheet. See [Import Shared Members and Varying Properties] for more information.

	A	B	C	D	E	F	G	H	I
1	Dimension	Action	Current Parent Name	Current Member Name	Parent In F	Name	SelectParentMember	Culture	CulturalDescription
2	NYENTITIES	ADD			FALSE	Sample Entity	Root	English (United States)	I speak English
3	NYENTITIES	ADD			FALSE	Sample Entity	Root	French (France)	Je parle français
4	NYENTITIES	ADD			FALSE	Sample Entity	Root	Finnish (Finland)	minä puhun suomea

Similarly, each security access group for a user should be entered on a separate row in the Mass Update spreadsheet. The image below provides an example.

	A	B	C	D	E
1	Action	Current User Name	UserName	UserType	UserGroups
2	ADD		Sample User	Interactive	ACM Access
3	ADD		Sample User	Interactive	ACM Super User
4					

If varying member properties are included in the layouts, all layouts for each step must have the same properties. For example, if Text1 is in the layout for the Initiate step, then Text1 should also be included in the Process step layout.

- For non-varying member properties, required fields must be in the first row from the group of rows that combine into one line item when saved to your items grid.
- For varying member properties, required fields must be in at least one row from the group of rows that combine into one line item when saved to your items grid.

When using Mass Update to make an update to any varying member properties, include all the existing values in the spreadsheet. If any existing varying member property contains data and is excluded or left blank in the spreadsheet, Application Control Manager will assume it is intentional and will remove the existing value.

For example, if Text1 currently contains value "123" in Scenario Type, Actual, and Time Value 2024M1 and you would like to add to it a value "456" in Scenario Type, Actual, and Time Value 2024M2, then both the existing "!23" and the updated value of "456" should be included in the Mass Update spreadsheet.

> **TIP:** To quickly pull all existing varying member properties for a member, first add a line item on the standard input page and then open that line item using Mass Update. You should see all varying members data listed in individual rows on the spreadsheet.

Validations

After data has been entered or imported into the spreadsheet, click the **Validate and Close** button to prompt the application to process each row and identify any existing errors. After this process is complete, a dialog box will appear to let you know the status of the validation check.

> **TIP:** Several factors may impact the application performance during the validation process such as number of records in the spreadsheet or number of properties in the layout. Reduce the data volumes if the system slows down.

If there are no errors, a dialog will confirm the successful validation of the spreadsheet. If the spreadsheet does not pass the validation check, a list of action items will display what must be corrected.

> **NOTE:** Failed validations will not show in the activity log.

The following are the validations each spreadsheet must pass:

- **Action** items must be provided for each row and cannot be left blank. Action items must be listed in all uppercase.
- **Dimension Name** must exist in the selected request profile and cannot be left blank.
- **Parent In Request** must either be left blank or set to **True** or **False**. This property is used to indicate whether the Parent for a particular member is being created within the current request. If there is a pre-existing Parent within the application, and it is not being modified within the request, this column should be set to **False**.
  - When **Parent In Request** is set to **True**, ensure the new parent exists in the ParentName row within the spreadsheet, or that the parent name exists in the line item table on the Request Details page.
- Each row must have a unique combination of data in the properties. Duplicate rows will produce a validation failure.

- Any validations assigned in the layout used for the selected request must be met within the spreadsheet.
- All required fields must be filled out.
- All actions except for **Add** require that Current Parent Name, New Parent Name, Member Name, or ParentName/SelectParentMember be filled out. If one of these fields is missing and is required to perform a selected action, the spreadsheet will not pass validation.
- Columns featuring a drop-down list must be left blank or filled with a value acceptable within the parameters of the request. This is particularly important to note for imported data.

Once the validation check has been passed, click **OK** to return to the **Request Details** page where your rows will be reflected in the **Items** table.

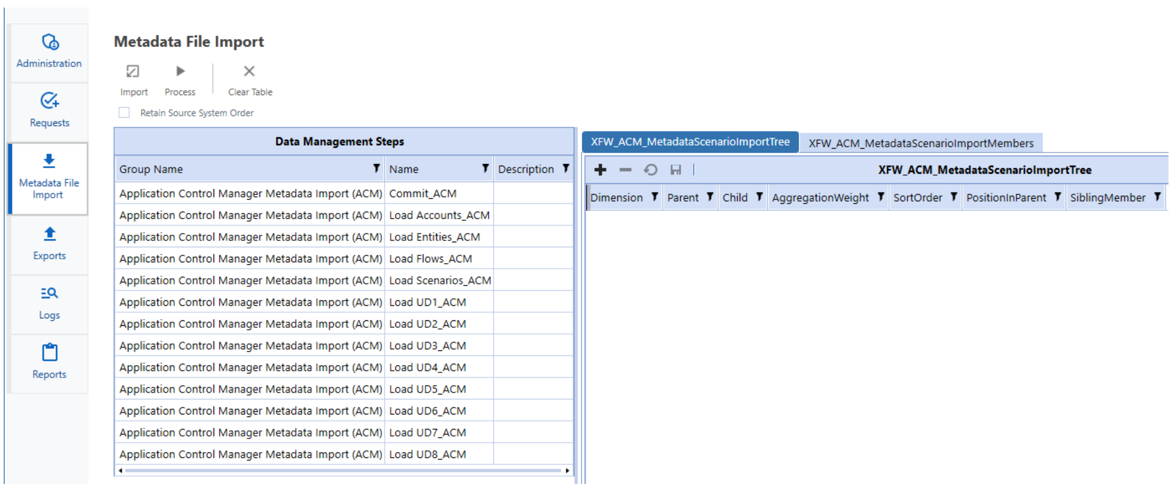
Edit Individual Items

Line items added using the Mass Update spreadsheet can still be added, edited, or removed individually, offering users multiple avenues of item entry and management. As the two sync together to maintain line-item changes within the request, any changes made using the item details layout will be reflected in the associated spreadsheet, and any changes made using the spreadsheet will be reflected in the details page.

Metadata File Import

A set of default Metadata Import Add-Ons are created on install to provide a way to source a full dimension hierarchy into the application staging tables. After the metadata is uploaded into the application, a process will run to compare the data against existing dimension hierarchy and automatically create a request with the detected changes.

You can use the interface on the Metadata File Import page to upload metadata using an Excel template (see Setup Metadata Import Excel Template), or create a custom Data Connector (see Setup Custom Metadata File Import).



Import: Select an Excel template to import. Data in the staging table will be replaced (not appended) with the new import dataset.

Process: Run the comparison process for the selected data management step.

Clear Table: Use this to clear imported data from the selected data management step.

Retain Source System Order: When checked, metadata will be sorted in the same order provided in the source data file.

Retain Source System Order

This allows you to specify how the metadata can be sorted in the dimension hierarchy. By default, this Retain Source System Order will be turned off. This is helpful when setting up and viewing financial reports. Enabling this feature will perform the following processes in the application:

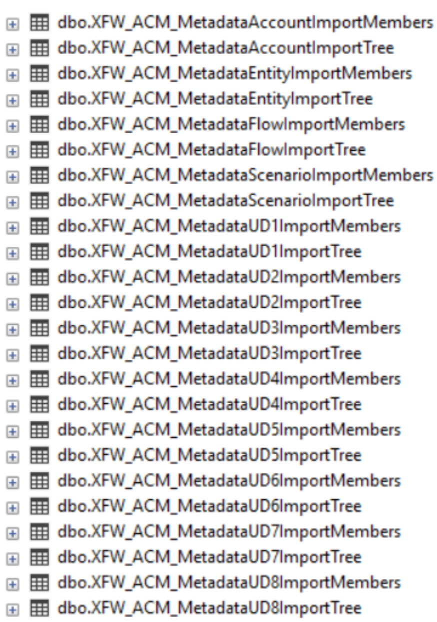
- The Sort Order column included in the metadata import file will be read into the application staging table.
- The system compares the sort order with the existing hierarchy and generates a request if the sort order is changed.
- Sort order changes are committed in the correct order, as specified by the import source file.

Import Add-On Components

The following different components are pre-installed with the solution to enable Metadata File Import engine to run.

Import Add-On Staging Tables

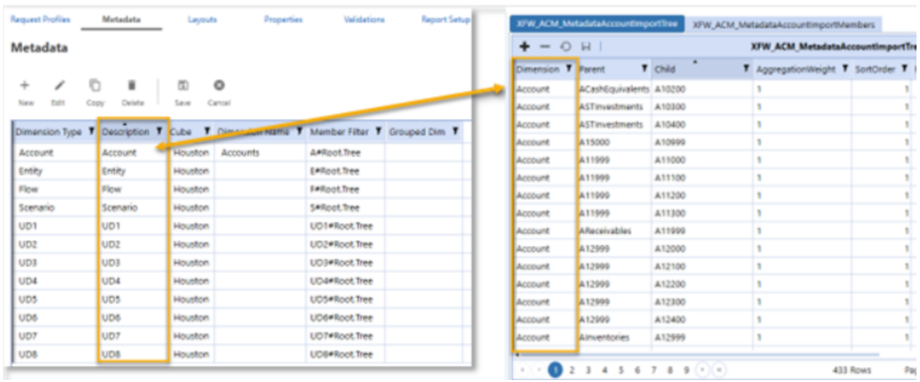
Each supported dimension has two related staging tables created during installation. Data imported using Excel templates are loaded into these tables.



- **Import Tree table**: Use for storing the relationship details, parent, and child. Each dimension table contains a different set of properties, including relationship properties and varying properties, relevant to the dimension.

  The following columns exist in all tree tables:

- **Dimension**: The dimension column must match the description of the dimension you are loading. This is set up in the **Administration** > **Dimensions** page.



- **Sort Order**: Retain Source System Order checkbox must be set to True for functionality. You can use this to define how the member is sorted in the hierarchy. If order is not important, enter a value of 1 for all rows in the hierarchy table and ensure the Retain Source System Order checkbox is unchecked.

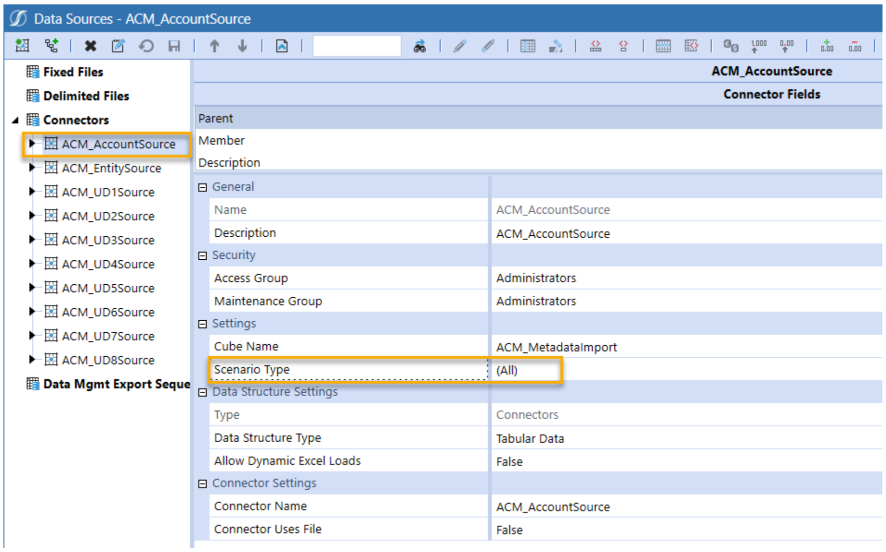
- **Import Member table**: Use for storing the member properties detail. Each dimension table contains a different set of properties, including varying properties, relevant to the dimension.

ImportMetadata that Uses Double Quotations

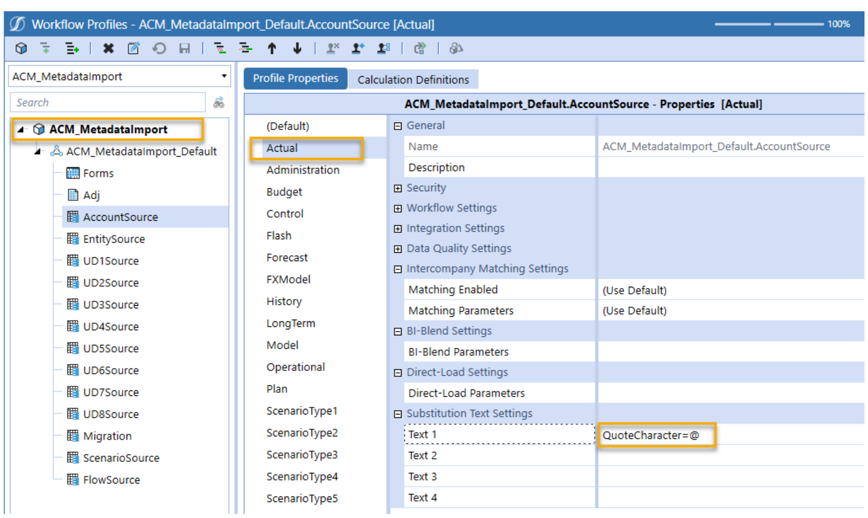
Application Control Manager uses the double quote as the default parser character in the connector rule. If you are importing Metadata that includes double quotations in the member description, text fields, or formulas you must specify a different parser character. The following steps layout how to define a new parser character.

1. Choose a character that is not used in your data set. For example, @, ^, or a pipe |.
2. Navigate to **Data Sources** > **Connectors** and select the connector you want to update.

> **NOTE:** Be sure to check which Scenario Type the connector is set to. In our example, ACM_AccountSource is set to (All) scenarios.



3. Navigate to **Workflow Profile** > **ACM_MetadataImport** > **AccountSource** > **Actual** > **Text 1** and enter QuoteCharacter=[character of your choice]. If this filed is populated, Application Control Manager will override the default quote character.



4. Navigate to **Business Rules** > **Connector** and select the rule for your source import. In this example, we are using the default ACM_AccountSource connector rule.

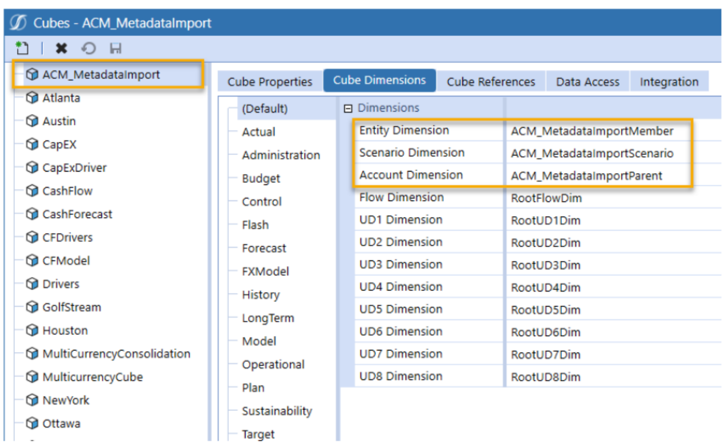
5. Update all properties in the rule with the parser character you have chosen.

```
// Create the SQL Statement
string sql = @"
    SELECT t.Parent, m.Member, '@' + m.Description + '@' AS Description, '@' + m.Text1 + '@' AS Text1, '@' + m.Text2 + '@' AS Tex
    '@' + m.Text7 + '@' AS Text7, '@' + m.Text8 + '@' AS Text8, '@' + m.UD1Constraint, '@' + m.UD2Constraint, '@' + m.UD3Constrai
    '@' + m.CubeType, '@' + m.ScenarioType, '@' + m.TimeVal, '@' + m.Culture, '@' + m.CulturalDescription, '@' + t.Dimension, '@'
    FROM XFW_ACM_MetadataAccountImportTree t INNER JOIN XFW_ACM_MetadataAccountImportMembers m on t.Child = m.Member
    ORDER BY Dimension, SortOrder";

return sql;
```

> **NOTE:** Only one parser character is used per connector rule, therefore you must update all properties to use the same character.

Cube and Dimensions

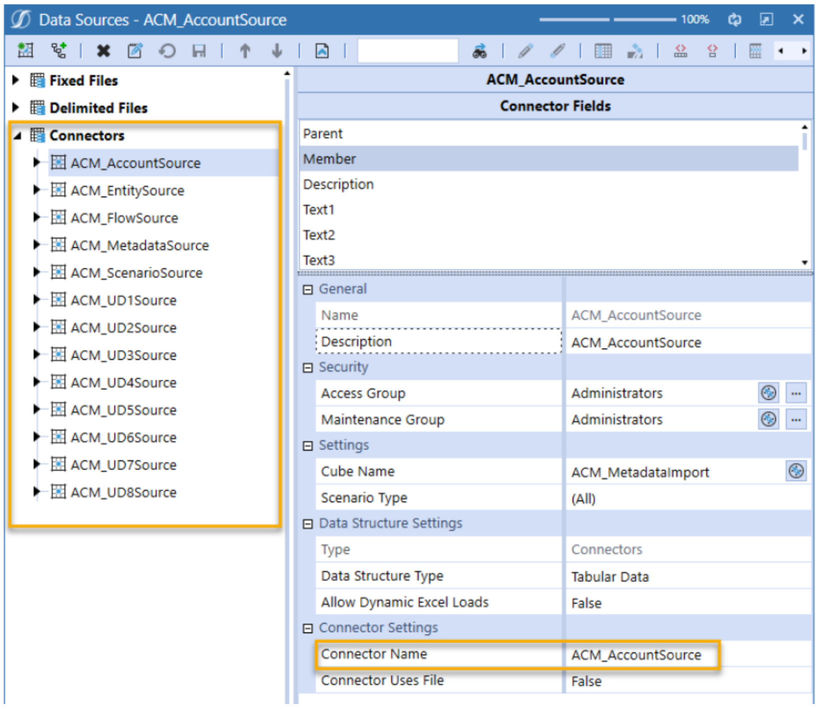
A default cube called **ACM_MetadataImport** and three members are created during installation. These connect to the default Transformation Rule Profiles and require components for the Metadata File Import process to function.



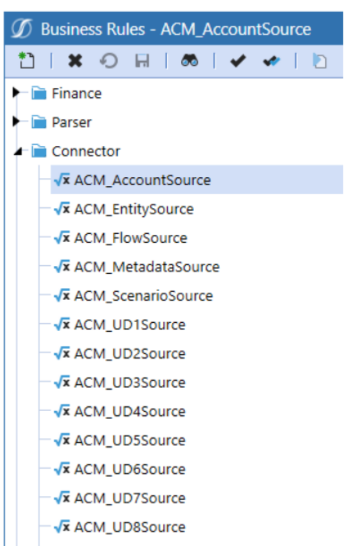
Data Sources and Business Rules

A Data Source Connector is created during installation for each supported dimension. These data sources are configured to connect to Application Control Manager Import Add-On staging tables using the default Business Rules Connector.

You can use the application interface to upload metadata using an Excel template. If you are not using an Excel template, modify these default data connectors to pull data from a specific file location (see Setup Custom Metadata File Import).



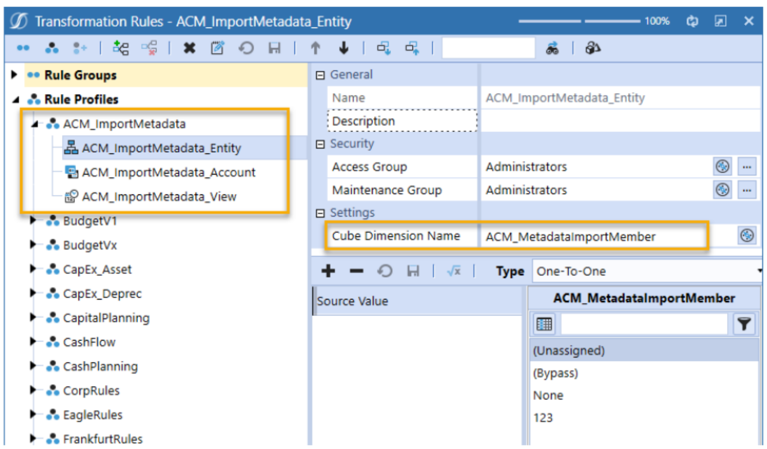
Each data source is setup to connect to the corresponding Business Rule Connector for the dimension type. For each of the supported dimension types, there is a Business Rule Connector created during installation.



The default Business Rules are coded with the properties associated with the dimension. The display order of these properties also matches with the default layouts created during installation.

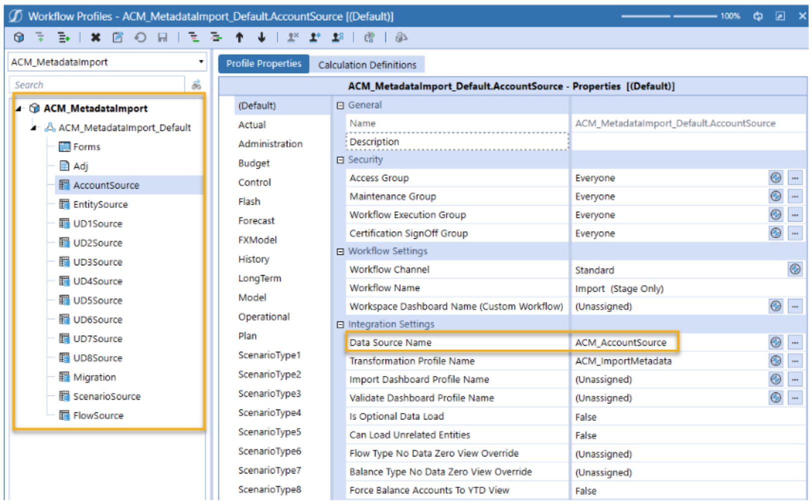
Transformation Rule Profiles

A Transformation Rule Profile called **ACM_ImportMetadata**, and three rule groups for Entity, Account, and View are created during installation. This profile is configured with the default cube ACM_MetadataImport and dimension names created during the installation.



Workflow Profiles

A Workflow Profile called **ACM_MetadataImport_Default** is created during installation. Each supported dimension under the Workflow Profile is configured to connect to the default data source connector created during installation.



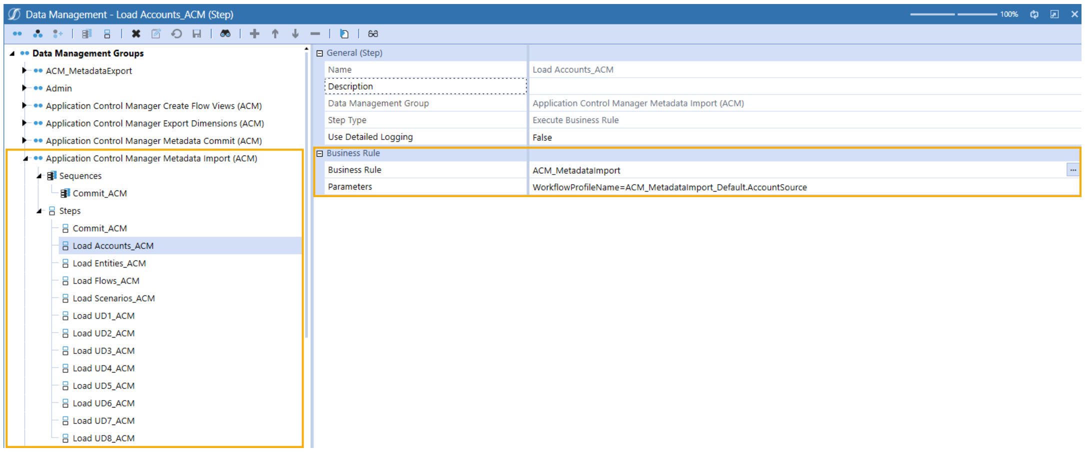
The Workflow Profiles are used to import metadata into the OneStream platform staging tables. After the information is loaded, Application Control Manager analyzes to determine differences that exist between OneStream and metadata loaded into the application staging table. The system looks for differences in this order:

1. Missing members in the metadata compared to the source metadata
2. Existing members that must be moved or copied to a different hierarchy
3. Updates to existing member properties

If updates are found, a request in the application will be generated. The results of this process are displayed on the main home page of the application.

Data Management Groups

A Data Management Group called **Application Control Manager Metadata Import (ACM)** with default sequences and steps is created during installation. These steps are configured to handle the process of loading and committing metadata updates to OneStream



Each supported dimension type has associated steps that are pre-configured to connect to the default business rule. The parameters are setup with the default workflow profiles created during installation.

When running these steps, it will perform the following processes:

- Loads the data from the database or file into the workflow for the current global POV time and scenario
- Compares the data loaded into staging to the existing OneStream members for the selected dimension and determines which members must be added
- Compares the data loaded into staging to the existing OneStream hierarchy for the selected dimension and determines which updates are required to the overall hierarchy
- Compares the data loaded into staging to the existing OneStream members and determines which properties must be modified
- Compares the existing members and hierarchy in OneStream to the data loaded into the staging to determine which members must be removed from the hierarchy. Any member not in the import file/table is marked as orphaned in OneStream. The member is not deleted.
- Generates an Application Control Manager request that performs all the required operations in a single transaction

After a request has been generated, the **Commit All Metadata Updates** data management step runs to commit the updates to the system.

Global POV Time

When running a metadata file import, the data is loaded in the current year and month. Staging tables and the Global Time is set to a full year.

If **Enforce Global POV** is set to **True**, the load process uses the value set in the Global POV. If the Global POV is set to a date format other than YYYYMM, the workflow profile will not load properly and an error message will be displayed.

If set to **False**, the data management source system import process ignores any Global POV settings and instead uses the system date and time to determine the period for loading data.

Import Varying Properties

The following type of properties will require special setup in the import source file to account for storing multiple different intersections for the same member. These properties are:

- Any type of varying properties. See the Properties section in this guide for more information.
- Cultural and Cultural descriptions
- Shared member or alternate hierarchy member

See Importing Shared Member and Varying Properties section for instructions.

Exports

There are two types of exports available on the Exports page: Export Requests and Export Dimensions.

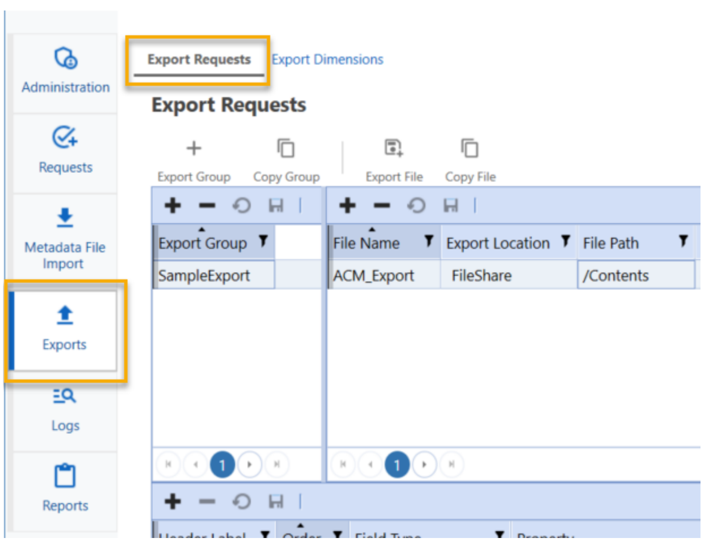
Export Requests

The Export Requests allows users to export request details into a file and folder of their choice. Here is an example of an exported .csv file:

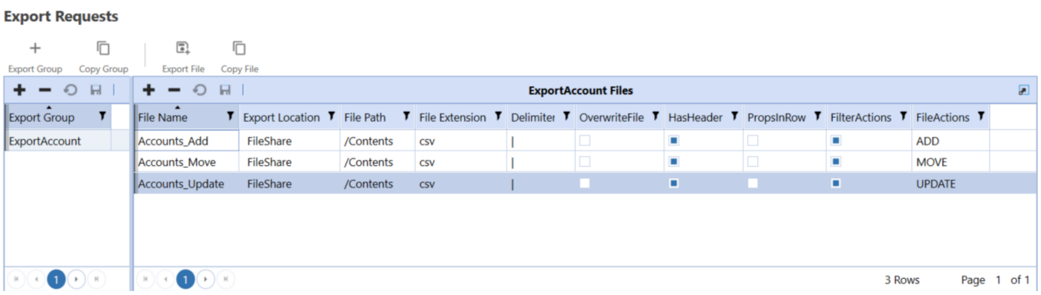
	A	B	C	D	E	F
1	**Dimension Name**	**Action**	**Member Name**	**Parent Name**	**Description**	**Request Status**
2	CorpAccounts	ADD	Sample Child	Sample Parent	Sample Child	Completed
3	CorpAccounts	ADD	Sample Parent	ACM_Demo	Sample Parent	Completed
4	CorpAccounts	MOVE	ACM Test Account	Sample Parent		Completed
5	CorpAccounts	UPDATE	ACM_Demo	Root	Demo Account Hierarchy	Completed
6	CorpAccounts	UPDATE	ACM Test Account	Sample Parent		Completed
7	CorpAccounts	ADD	NewAcct	Sample Parent		Completed

You can configure which properties and information is included in the export file. There is also an option to run the export by a date range as well as the option to setup an Export step in a Request Profile to run the export every time a request is committed.

To configure the Export criteria, navigate to Exports on the left navigation bar and select **Export Requests**.



Use the **+** and **-** icons to add or remove items in the grid. Below is an example of an Export Group, files, and the file content setup:



- **Export Group**: A collection of files to be exported
- **File Name**: The title of the file
- **Export Location**: The file location after it is exported
  - Local
  - File Share
- **File Path**: The location of the file.
- **File Extension**: File extension examples are txt, pdf, xls, doc, csv.
- **Delimiter**: Delimiters are used to separate the export properties on file.
- **OverwriteFile**: If selected, the file can be overwritten.
- **HasHeader**: Indicates if the file has a header row.
- **PropsInRow**: If selected, properties in the row can be set.
- **FilterActions**: This setting is used to specify if only certain actions are allowed to get exported. If not selected, all actions are included in the file.
- **FileActions**: Actions that can be added to the file such as add, modify, and remove.

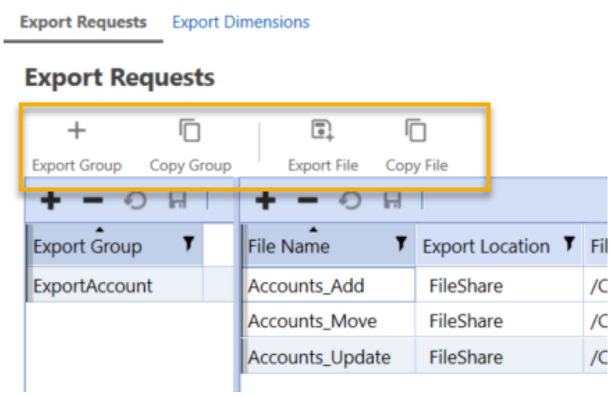
The next section allows you to specify data or properties that are included in the export file.

Accounts_Update Properties

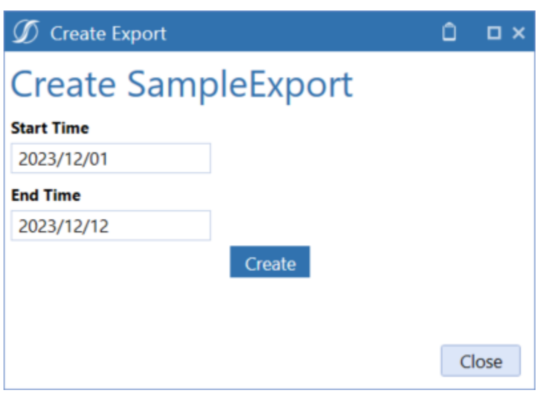
Header Label	Order	Field Type	Property	Input Value	FixedInRow
Dimension Name	1	FlowDimensionName			☑
Action	2	FlowAction			☑
Member Name	3	PropertyValue	Name (Name)		☑
Parent Name	4	PropertyValue	SelectParentMember (Parent Member Selector)		☑
Description	5	PropertyValue	Description (Default Description)		☑
Request Status	6	RequestStatus			☐

- **Header Label**: Description of the header column of your choice
- **Order**: Display order of the header columns
- **Field Type**: The type of header properties. Selections include:
  - Input Value
  - Property Value
  - Property Name
  - Property Label
  - Flow Action
  - Flow Dimension
  - Flow Dimension Label
  - Flow Dimension Name
  - Request Status
- **Property**: Name of the property
- **Input Value**: If the Field Type is not defined, this will be the default value for the property.
- **FixedInRow**: If PropsInRow is selected, the export will look for properties that are not set as FixedInRow

Export Requests Toolbar



- **Export Group**: This will bring up the date range window. Click on **Create** to run the export for all files within the selected group.

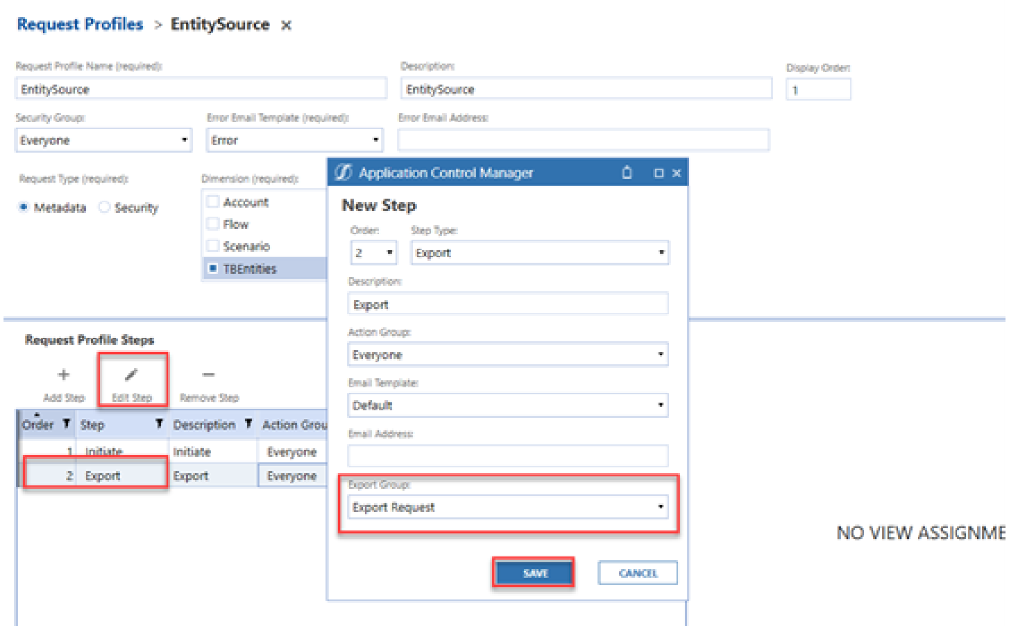


- **Copy Group**: Make a copy of the selected group and all the files within the group.
- **Export File**: This will bring up the date range window. Click on **Create** to run the export for the single selected file.
- **Copy File**: Make a copy of the selected file and all of the properties criteria within the file. **_ COPY** will be added at the end of the file name.

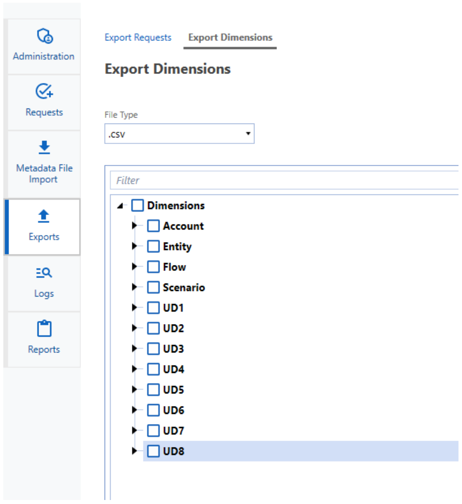
Set up an Export Step in the Request Profile

An Export step can be added to any Request Profile after the Initiate step but prior to the Commit step. When the request reaches the Export step, the user will manage the request by clicking on the **Manage** icon from the home page. Then click on **Submit** to advance to the next step. The export process will run when the request is committed.

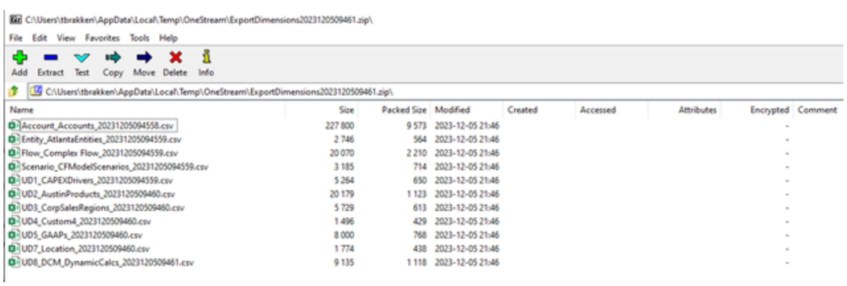
When adding the Export step in the Request Profile, select the **Export Group** from the drop-down. This is required for the Export step to save.



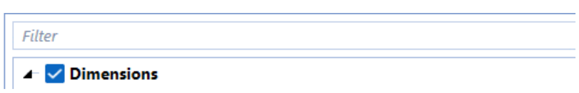
Export Dimension



Dimensions can be exported into CSV format. Exported dimensions populate as a .zip file to the file location selected by the user within File Share. The dimension(s) exported are individual CSV files sorted by dimension type in the .zip file.



> **NOTE:** When looking for a dimension, you can search by inputting a partial name of the dimension above the hierarchy view.



Dimension data is in Parent-Child relationship format and contains all OneStream properties.

The following is an example of a .csv file:

Dimension	SortOrder	Child	Description	Parent	DisplayMemberGroup	ReadDataGroupUniqueID	ReadDataGroupUniqueID2	ReadWriteDataGroupUniqueID	ReadWriteDataGroupUniqueID2	UseCubeDataAccessSecurity
AustinEntities	1	Austin		Root	Everyone	Everyone	Nobody	Everyone	Nobody	FALSE
AustinEntities	1	Austin		Root	Everyone	Everyone	Nobody	Everyone	Nobody	FALSE
AustinEntities	1	Austin		Root	Everyone	Everyone	Nobody	Everyone	Nobody	FALSE
AustinEntities	1	Austin		Root	Everyone	Everyone	Nobody	Everyone	Nobody	FALSE
AustinEntities	1	Austin		Root	Everyone	Everyone	Nobody	Everyone	Nobody	FALSE

> **NOTE:** Custom properties created in Application Control Manager are not included in the export.

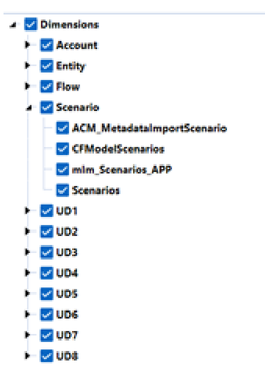
For members that are shared across different parents, it will display each relationship in separate rows. This is the same for members containing varying member properties.

When selecting a folder, ensure it is a folder you have access to otherwise an error message will populate.

Steps to Export a Dimension

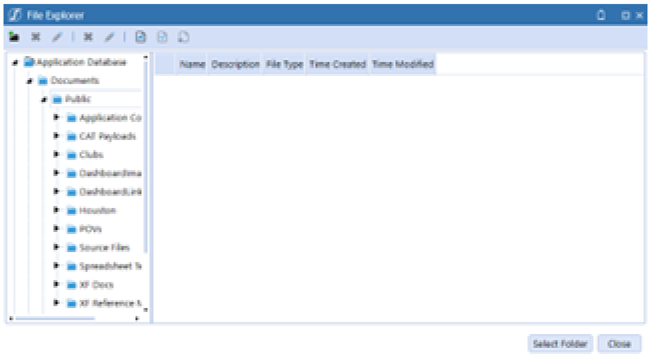
1. Select the drop-down menu for your file type.

2. Choose the dimension(s) you would like to export in the hierarchical tree view. You can multi-select the dimensions or select all dimensions.

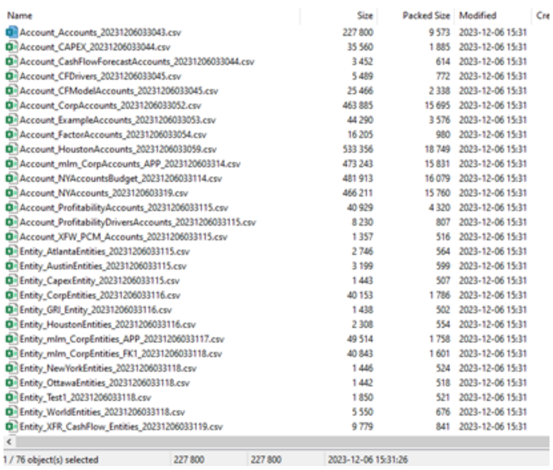


3. Once your selections have been made, click the **Export** button on the right side of the page.

4. Notice your file explorer pops up. Select a folder to add the .zip file to.



5. Once the file has successfully loaded, open the file and find your .csv files split up by dimension.

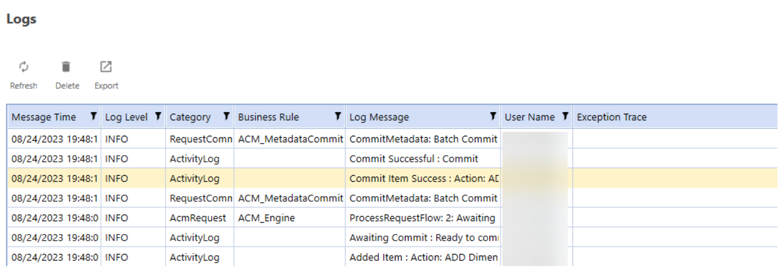


Name	Size	Packed Size	Modified	Cre
Account_Accounts_20231206033043.csv	227 800	9 573	2023-12-06 15:31	
Account_CAPEX_20231206033044.csv	35 560	1 885	2023-12-06 15:31	
Account_CashFlowForecastAccounts_20231206033044.csv	3 452	614	2023-12-06 15:31	
Account_CFDrivers_20231206033045.csv	5 489	772	2023-12-06 15:31	
Account_CFModelAccounts_20231206033045.csv	25 466	2 338	2023-12-06 15:31	
Account_CorpAccounts_20231206033052.csv	463 885	15 695	2023-12-06 15:31	
Account_ExampleAccounts_20231206033053.csv	44 290	3 576	2023-12-06 15:31	
Account_FactorAccounts_20231206033054.csv	16 205	980	2023-12-06 15:31	
Account_HoustonAccounts_20231206033059.csv	533 356	18 749	2023-12-06 15:31	
Account_mlm_CorpAccounts_APP_2023120603314.csv	473 243	15 831	2023-12-06 15:31	
Account_NYAccountsBudget_20231206033114.csv	481 913	16 079	2023-12-06 15:31	
Account_NYAccounts_2023120603319.csv	466 211	15 760	2023-12-06 15:31	
Account_ProfitabilityAccounts_20231206033115.csv	40 929	4 320	2023-12-06 15:31	
Account_ProfitabilityDriversAccounts_20231206033115.csv	8 230	807	2023-12-06 15:31	
Account_XFW_PCM_Accounts_20231206033115.csv	1 357	516	2023-12-06 15:31	
Entity_AtlantaEntities_20231206033115.csv	2 746	564	2023-12-06 15:31	
Entity_AustinEntities_20231206033115.csv	3 199	599	2023-12-06 15:31	
Entity_CapexEntity_20231206033115.csv	1 443	507	2023-12-06 15:31	
Entity_CorpEntities_20231206033116.csv	40 153	1 786	2023-12-06 15:31	
Entity_GRI_Entity_20231206033116.csv	1 438	502	2023-12-06 15:31	
Entity_HoustonEntities_20231206033116.csv	2 308	554	2023-12-06 15:31	
Entity_mlm_CorpEntities_APP_20231206033117.csv	49 514	1 758	2023-12-06 15:31	
Entity_mlm_CorpEntities_FK1_20231206033118.csv	40 843	1 601	2023-12-06 15:31	
Entity_NewYorkEntities_20231206033118.csv	1 446	524	2023-12-06 15:31	
Entity_OttawaEntities_20231206033118.csv	1 442	518	2023-12-06 15:31	
Entity_Test1_20231206033118.csv	1 850	521	2023-12-06 15:31	
Entity_WorldEntities_20231206033118.csv	5 550	676	2023-12-06 15:31	
Entity_XFR_CashFlow_Entities_20231206033119.csv	9 779	841	2023-12-06 15:31	

1 / 76 object(s) selected | 227 800 | 227 800 | 2023-12-06 15:31:26

Logs

Application Control Manager has detailed logging where administrators can view all of the processing events including errors that have occurred in the solution. This log also contains the request activities entries.

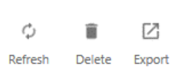


Message Time	Log Level	Category	Business Rule	Log Message	User Name	Exception Trace
08/24/2023 19:48:1	INFO	RequestComn	ACM_MetadataCommit	CommitMetadata: Batch Commit		
08/24/2023 19:48:1	INFO	ActivityLog		Commit Successful : Commit		
08/24/2023 19:48:1	INFO	ActivityLog		Commit Item Success : Action: AD		
08/24/2023 19:48:1	INFO	RequestComn	ACM_MetadataCommit	CommitMetadata: Batch Commit		
08/24/2023 19:48:0	INFO	AcmRequest	ACM_Engine	ProcessRequestFlow: 2: Awaiting		
08/24/2023 19:48:0	INFO	ActivityLog		Awaiting Commit : Ready to comi		
08/24/2023 19:48:0	INFO	ActivityLog		Added Item : Action: ADD Dimen		

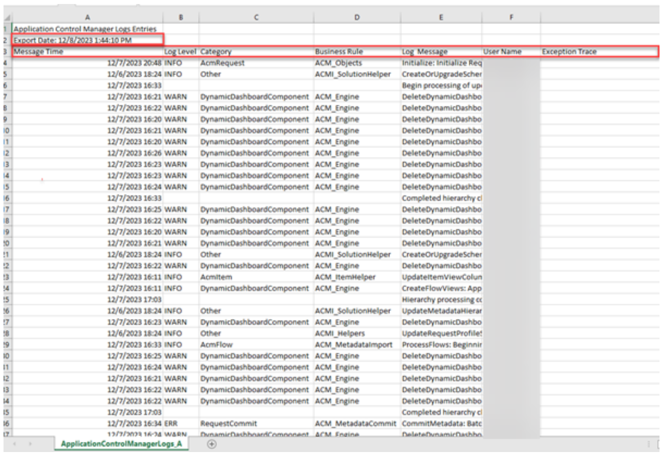
Click **Refresh** to refresh the detailed logging screen. Click **Delete** to clear all Application Control Manager log files, and click **Export** to export logs into a CSV format which can be saved as an archive or a back up before deleting log entries.

- **Message Time**: Time stamp for the activity
- **Log Level**: Captures the type of Log item that was written (for example, Information, Warning, Error, or Fatal)
- **Category**: The organization of the system type that generated that Log Entry
- **Business Rule**: Business Rule responsible for writing the Log Entry
- **Log Message**: Description of the activity
- **User Name**: Login name of the user who performed the activity
- **Exception Trace**: The full path of the error. These breadcrumbs lead to the error.

Logs Toolbar



- **Refresh**: Refreshes the entire grid to the most updated version
- **Delete**: Deletes all log entries
- **Export**: Exports all log entries into a .csv file. These columns will display identical to the information in the grid. In the top left corner of your .csv file you will see the time that you exported the file. Refer to the example below:

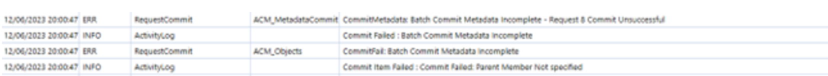


	A	B	C	D	E	F	
1	Application Control Manager Logs Entries						
2	Export Date: 12/8/2023 1:44:10 PM						
3	Message Time	Log Level	Category	Business Rule	Log Message	User Name	Exception Trace
4	12/7/2023 20:48	INFO	AcmRequest	ACM_Objects	Initialize: Initialize Req		
5	12/6/2023 18:24	INFO	Other	ACMI_SolutionHelper	CreateOrUpgradeScher		
6	12/7/2023 16:33				Begin processing of up		
7	12/7/2023 16:21	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
8	12/7/2023 16:22	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
9	12/7/2023 16:20	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
10	12/7/2023 16:21	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
11	12/7/2023 16:20	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
12	12/7/2023 16:26	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
13	12/7/2023 16:23	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
14	12/7/2023 16:23	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
15	12/7/2023 16:24	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
16	12/7/2023 16:33				Completed hierarchy cl		
17	12/7/2023 16:25	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
18	12/7/2023 16:22	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
19	12/7/2023 16:20	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
20	12/7/2023 16:21	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
21	12/6/2023 18:24	INFO	Other	ACMI_SolutionHelper	CreateOrUpgradeScher		
22	12/7/2023 16:22	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
23	12/7/2023 16:11	INFO	AcmItem	ACM_ItemHelper	UpdateItemViewColun		
24	12/7/2023 16:11	INFO	DynamicDashboardComponent	ACM_Engine	CreateFlowViews: App		
25	12/7/2023 17:03				Hierarchy processing cc		
26	12/6/2023 18:24	INFO	Other	ACMI_SolutionHelper	UpdateMetadataHierar		
27	12/7/2023 16:23	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
28	12/6/2023 18:24	INFO	Other	ACMI_Helpers	UpdateRequestProfile!		
29	12/7/2023 16:33	INFO	AcmFlow	ACM_MetadataImport	ProcessFlows: Beginnir		
30	12/7/2023 16:25	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
31	12/7/2023 16:24	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
32	12/7/2023 16:21	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
33	12/7/2023 16:22	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
34	12/7/2023 16:22	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		
35	12/7/2023 17:03				Completed hierarchy cl		
36	12/7/2023 16:34	ERR	RequestCommit	ACM_MetadataCommit	CommitMetadata: Batc		
37	12/7/2023 16:24	WARN	DynamicDashboardComponent	ACM_Engine	DeleteDynamicDashbo		

ApplicationControlManagerLogs_A

The following are examples of different log messages:

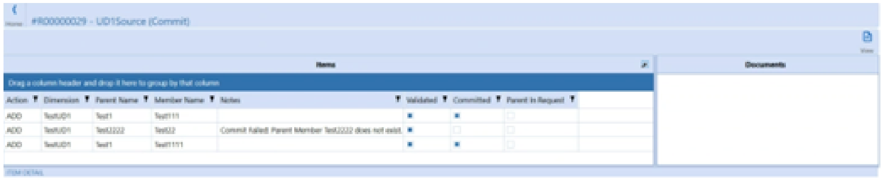
Failed Commit: When the request is committed unsuccessfully.

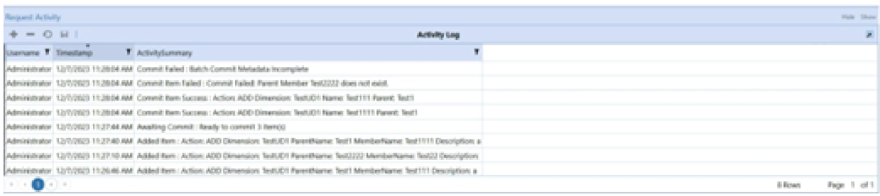


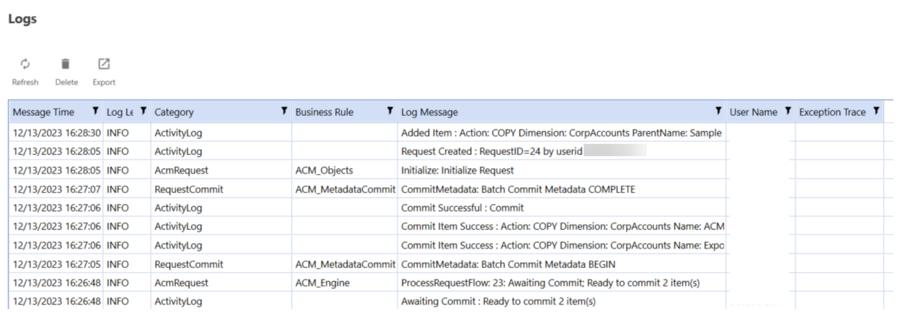
12/06/2023 20:00:47	ERR	RequestCommit	ACM_MetadataCommit	CommitMetadata: Batch Commit Metadata Incomplete - Request 8 Commit Unsuccessful
12/06/2023 20:00:47	INFO	ActivityLog		Commit Failed : Batch Commit Metadata Incomplete
12/06/2023 20:00:47	ERR	RequestCommit	ACM_Objects	CommitFail: Batch Commit Metadata Incomplete
12/06/2023 20:00:47	INFO	ActivityLog		Commit Item Failed : Commit Failed: Parent Member Not specified

Partial Commit: When only a part of the request is committed successfully. These log messages vary based on whether the request is a metadata import or a user-initiated request.

- **User-Initiated Example**: You have multiple line items in a user-initiated request and for one of the lines, the parent member doesn't exist. This will fail the commit for that single line item but will commit all the other line items.

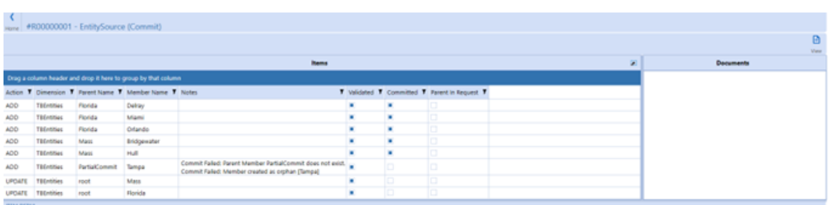


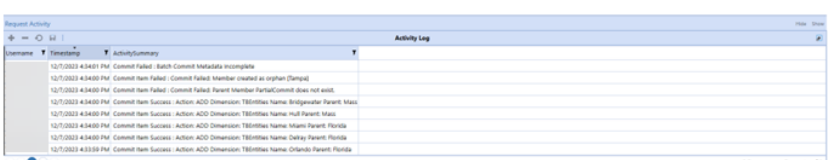


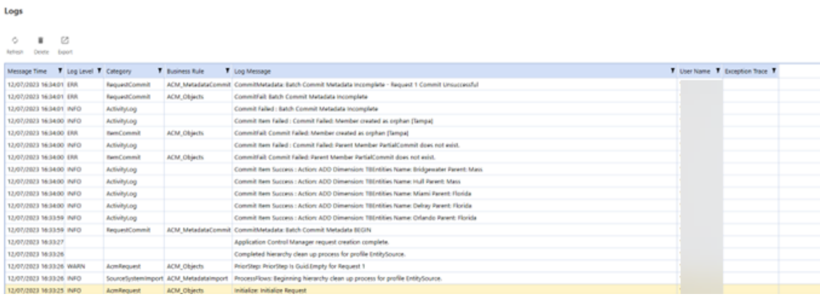


Message Time	Log Le	Category	Business Rule	Log Message	User Name	Exception Trace
12/13/2023 16:28:30	INFO	ActivityLog		Added Item : Action: COPY Dimension: CorpAccounts ParentName: Sample		
12/13/2023 16:28:05	INFO	ActivityLog		Request Created : RequestID=24 by userid		
12/13/2023 16:28:05	INFO	AcmRequest	ACM_Objects	Initialize: Initialize Request		
12/13/2023 16:27:07	INFO	RequestCommit	ACM_MetadataCommit	CommitMetadata: Batch Commit Metadata COMPLETE		
12/13/2023 16:27:06	INFO	ActivityLog		Commit Successful : Commit		
12/13/2023 16:27:06	INFO	ActivityLog		Commit Item Success : Action: COPY Dimension: CorpAccounts Name: ACM		
12/13/2023 16:27:06	INFO	ActivityLog		Commit Item Success : Action: COPY Dimension: CorpAccounts Name: Expo		
12/13/2023 16:27:05	INFO	RequestCommit	ACM_MetadataCommit	CommitMetadata: Batch Commit Metadata BEGIN		
12/13/2023 16:26:48	INFO	AcmRequest	ACM_Engine	ProcessRequestFlow: 23: Awaiting Commit; Ready to commit 2 item(s)		
12/13/2023 16:26:48	INFO	ActivityLog		Awaiting Commit : Ready to commit 2 item(s)		

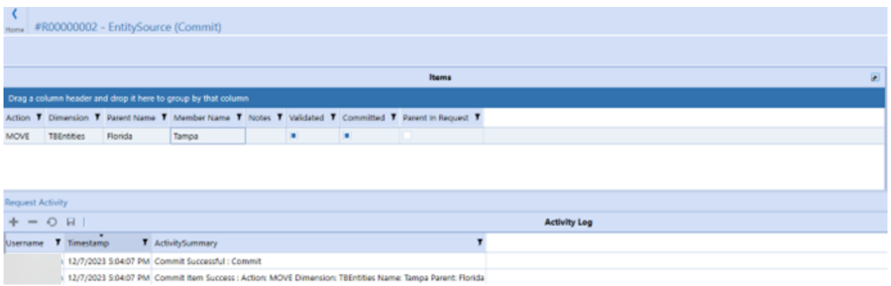
- **Metadata Import File Example**: You have a Metadata File with a line item that does not have an existing parent member. When on the Commit step, everything but that line item will be committed to your Dimension Library.

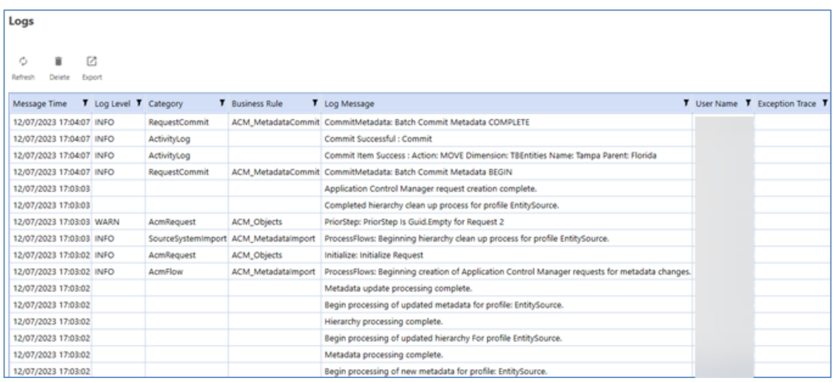






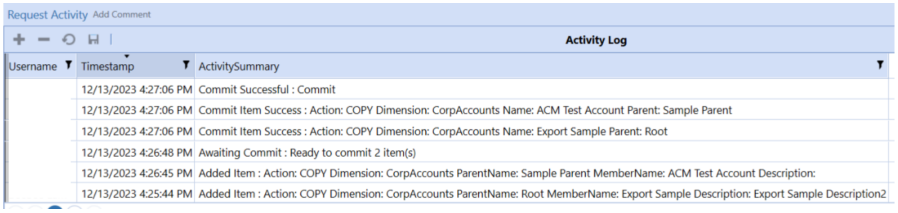
Successful Commit: When all line items in your request (Metadata Import or User-Initiated) have been successfully committed.





Request Activity

The Request Activity log can be found on the requests details page and shows a running log of the current activity specific to a selected request. For more information on the request details page, see [Request Details Page](#).


Request Activity Add Comment

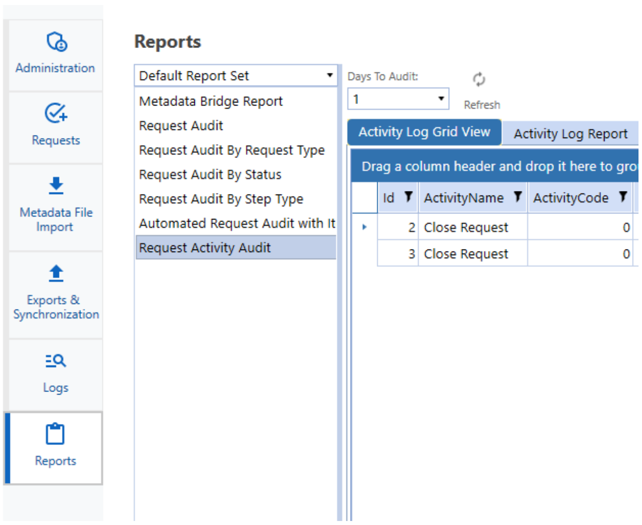
Activity Log

Username	Timestamp	ActivitySummary
	12/13/2023 4:27:06 PM	Commit Successful : Commit
	12/13/2023 4:27:06 PM	Commit Item Success : Action: COPY Dimension: CorpAccounts Name: ACM Test Account Parent: Sample Parent
	12/13/2023 4:27:06 PM	Commit Item Success : Action: COPY Dimension: CorpAccounts Name: Export Sample Parent: Root
	12/13/2023 4:26:48 PM	Awaiting Commit : Ready to commit 2 item(s)
	12/13/2023 4:26:45 PM	Added Item : Action: COPY Dimension: CorpAccounts ParentName: Sample Parent MemberName: ACM Test Account Description:
	12/13/2023 4:25:44 PM	Added Item : Action: COPY Dimension: CorpAccounts ParentName: Root MemberName: Export Sample Description: Export Sample Description2

Reports

The Reports page allows you to view existing reports. Reports are displayed according to the report configuration set by the system administrator.

Upon installation, nine default reports are available to you. For information on creating a custom report, see Create Custom Reports.



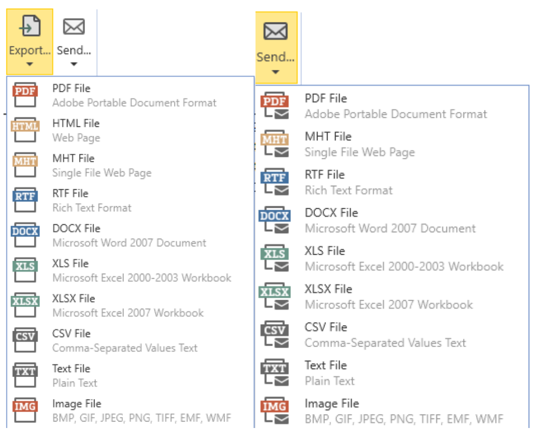
- **Metadata Bridge Report**: Displays the requester, all metadata changes made, action, and status in Application Control Manager.
- **Request Audit**: Displays all requests made in a specified time (in days).
- **Request Audit by Request Type**: Displays the audit report specified by request type.
- **Request Audit by Status**: Displays the audit report by status.
- **Request Audit by Step Type**: Displays the audit report by step type.
- **Automated Request Audit with Item Detail**: Displays all requests that were automated from a source system into Application Control Manager.
- **Request Activity Audit**: Displays all activity that has happened in a specified audit time (in days).

Share Report Data

To share the data from the Grid View tab, right click anywhere on the table, select **Export** and then select the format for export:

- Excel XML
- CSV
- Text
- HTML

To send data from the report tab, click the **Export** or **Send** selector from the toolbar and then select the format for export:



Additionally, reports can be printed from the report tab toolbar.

Practical Use Cases

The following topics provide a more detailed look into the use of features offered in Application Control Manager.

Sample User-initiated Request

The following section illustrates how to set up a user-initiated request process starting from setting up the Request Profile to committing the change to the Dimension Library.

In this example we will:

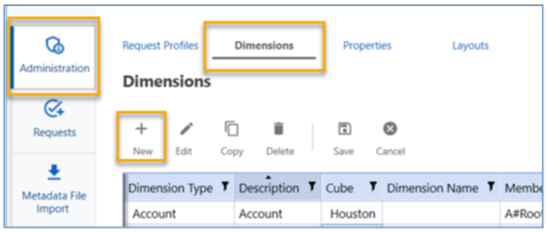
- Add a new account and enrich it with a custom property.
- Assign a validation to the custom property.
- Update an existing description and move the member to a new parent.
- Approve the request with a read-only layout.
- Commit the request to the OneStream Dimension Library.

The following assumptions apply to this example:

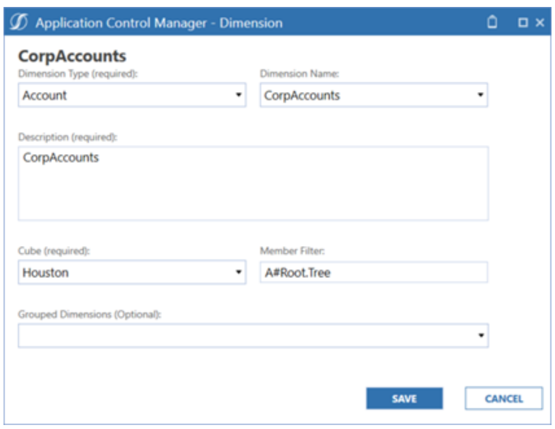
- We have OneStream security groups called ACM_Requesters, ACM_Enrichers, and ACM_Approvers.
- The ACM Test Mode is set to True.
- We have an Account hierarchy called CorpAccounts in the Houston cube.

Set Up a User-initiated Request Profile

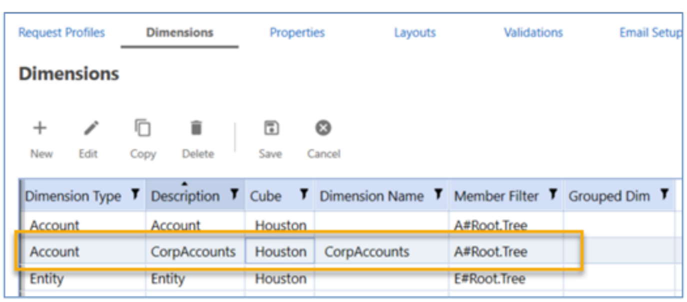
1. Go to **Administration** > **Dimensions**. Click the **New** icon to open the editing page.



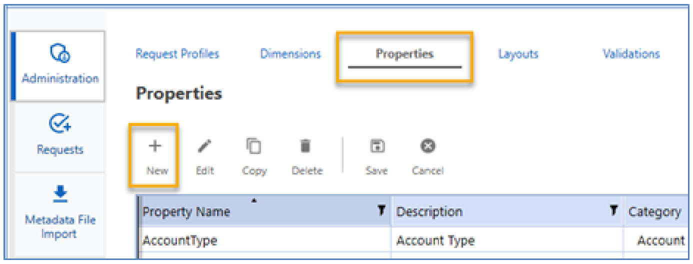
2. Select **CorpAccounts** in the Houston cube .



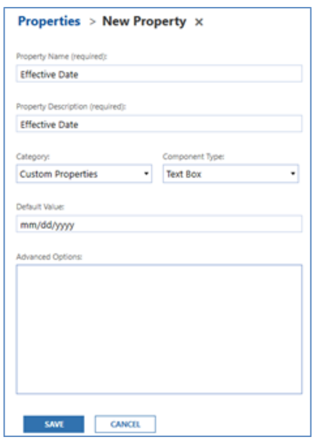
3. Click the **SAVE** button, and you should see the changes saved in the Dimension grid. Dimension setup is now complete.



4. Go to the **Properties** page to create the custom property for use in the enrich step. Click the **New** icon to open the editing page.

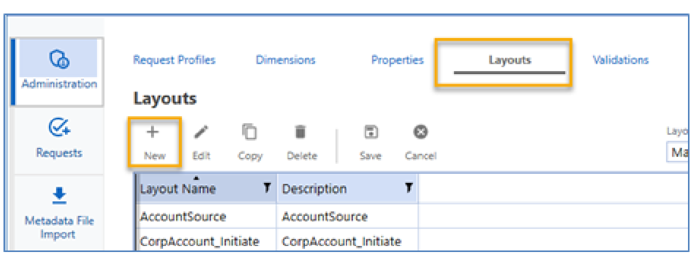


5. We are going to create a custom property named **Effective Date** with a default date format of mm/dd/yyyy. After we create the layout, we will assign a validation to this property.

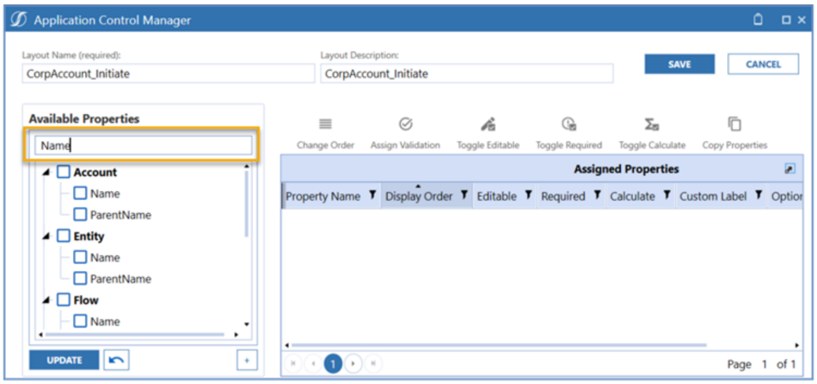


Creating a custom property is now complete.

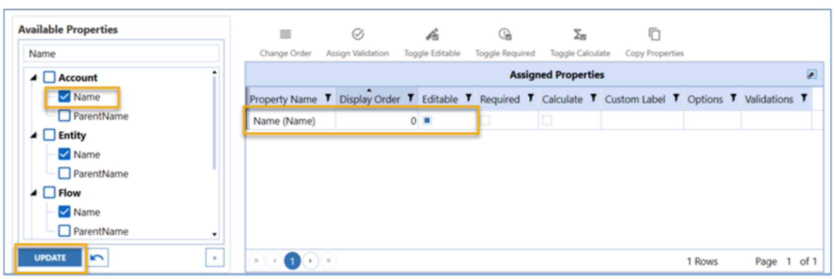
6. Navigate to **Layouts** and click on the **New** icon to open the editing page. We are going to create three different layouts, one for each of the steps.



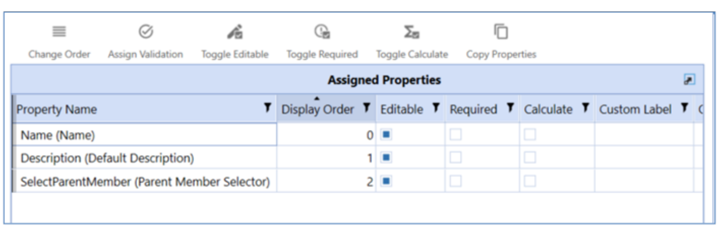
7. First we will create a layout for the requester to input the changes. Give the layout a unique name and description. Then, in the **Filter** field, enter the first property (Name) to search for it instantly.



8. Select the check box next to the Name property, then click the **UPDATE** button, and you should see the property move to the **Assigned Properties** grid on the right.

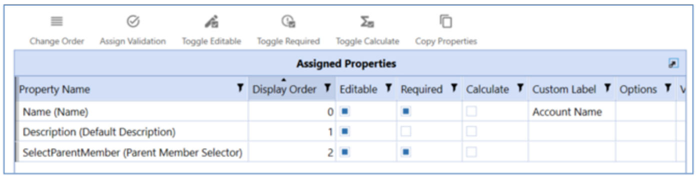


9. Repeat steps seven and eight to continue adding properties to the layout.

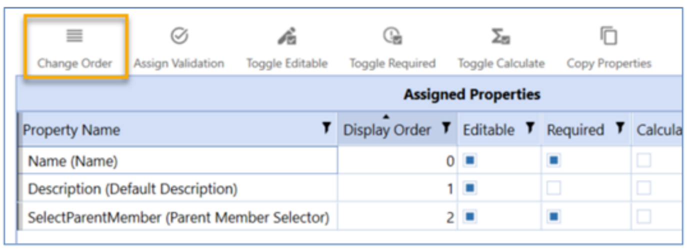


> **TIP:** You can select multiple properties in the Available Properties list and then click the **UPDATE** button to move all selected properties to the grid at one time.

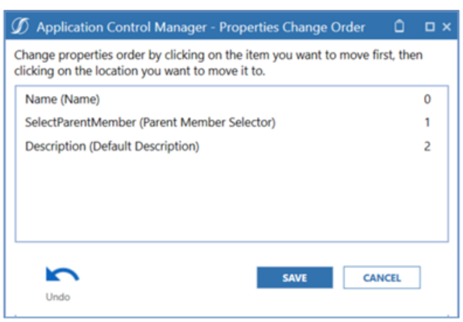
10. To make the Name and Parent Member properties a required field, select the check box in the **Required** column. We also want to give the custom label name of Account Name. Click the**Save** button and it should look like this:



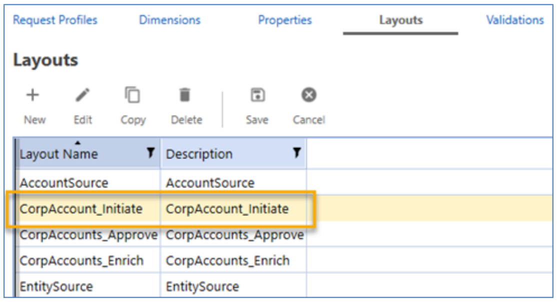
11. Now we want to move the Description to the last position. Click on the **Change Order** icon to open the editing page.



12. Click **Description** and then **SelectParentMember** and you will see their positions swap. Click the **SAVE** button to close the window.

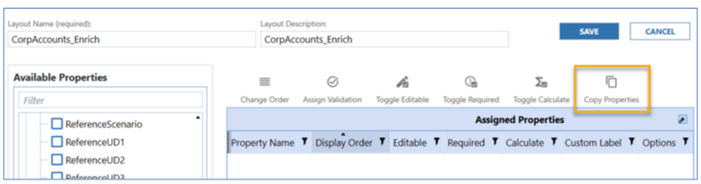


13. Click the **Save** icon to save the layout. Navigate to the **Layouts** page and you should see CorpAccount_Initiate in the grid.

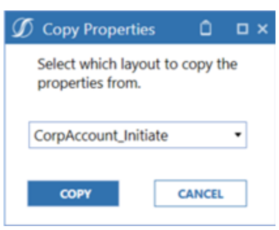


14. Now we will create a layout for the **Enrich** step. Follow previous instructions to open a new Layout editor page.

    This time we will use the **Copy Properties** feature to quickly copy the same properties from the CorpAccount_Initiate layout.

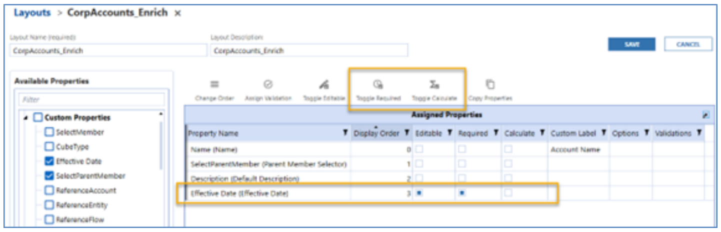


15. From the **Copy Properties** dialog box, select the CorpAccount_Inititate layout. Click the **COPY** button and you should see the properties copied over in the **Assigned Properties** grid.



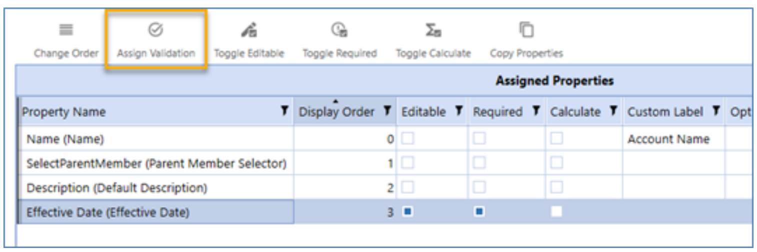
16. Add the **Effective Date** custom property to this enrich layout. To protect data integrity, we also want to prevent the enricher from changing values that the requester has input. Make the properties un-editable by clearing the **Editable** check box.

    The result should look like this:

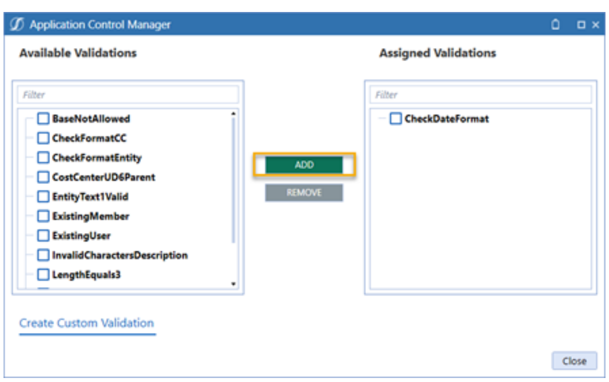


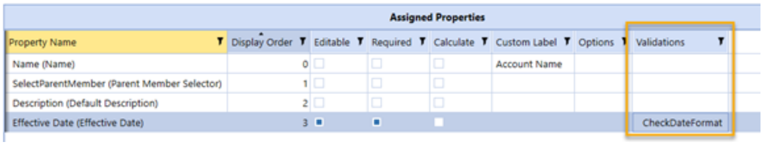
TIP: Use the Toggle Editable and Toggle Required to quickly select all check boxes.

17. Now we will assign the **Check Date Format** validation (which is a pre-installed validation) to the Effective Date. In the grid, select the **Effective Date** property, then click the **Assign Validation** icon to open the assign window.



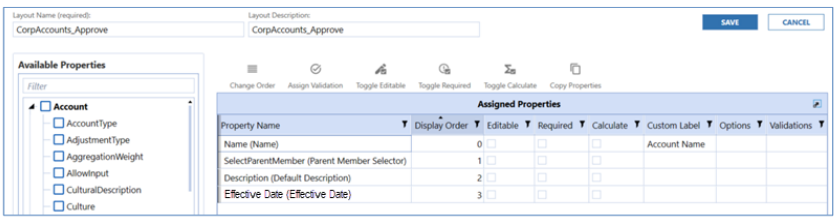
18. Select the check box next to **CheckDateFormat** and click the **ADD** button to move it to the Assigned Validations pane. Close the window and you should see the **Validations** column in the grid updated.



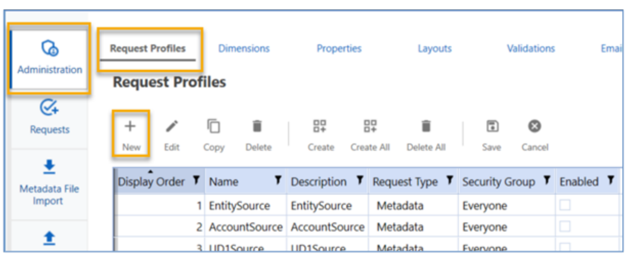


Click the **Save** button and the Enrich layout is now complete.

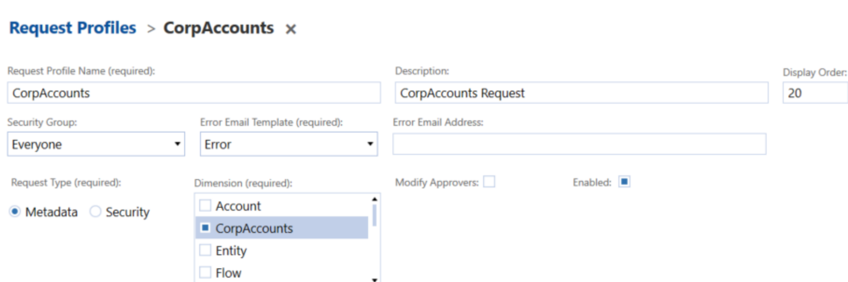
19. Next, repeat previous steps and create a read-only layout for the Approve step. The result should look like the following image. Save the three layouts.



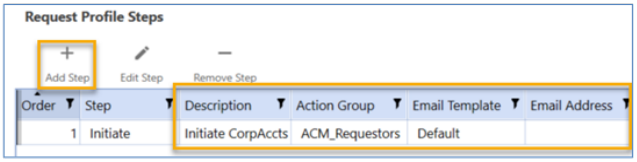
20. Next, navigate to the **Request Profiles** page and click the **New** icon to open the editing page.



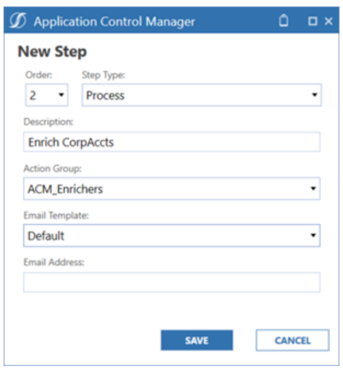
21. Here we will name the profile **CorpAccounts**, with a description of **CorpAccounts Request**. The request type is **Metadata** and the Dimension is what we have set up, **CorpAccounts**. Select the **Enabled** check box to make it visible for the user to select.



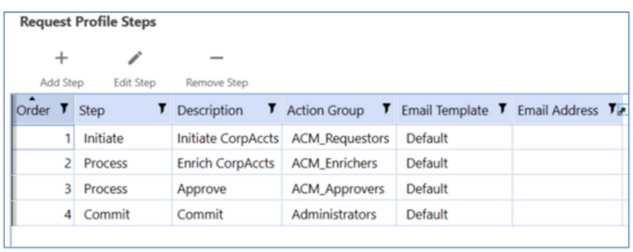
22. On the **Request Profile Steps** grid, change the description for the Initiate step and the action group as needed. Then, click the **Add Step** icon to open the editing page.



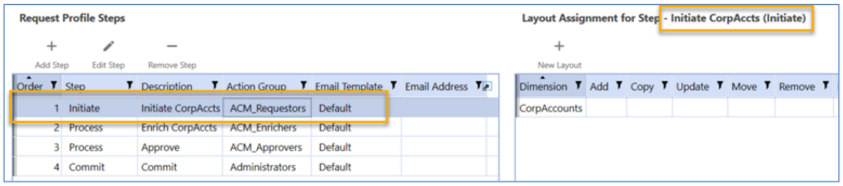
23. The next step in the request is Enrich. We will select the step type, **Process**, and type the description **Enrich CorpAccts**. Set the **Action Group** to the appropriate security group. Click the **SAVE** button.



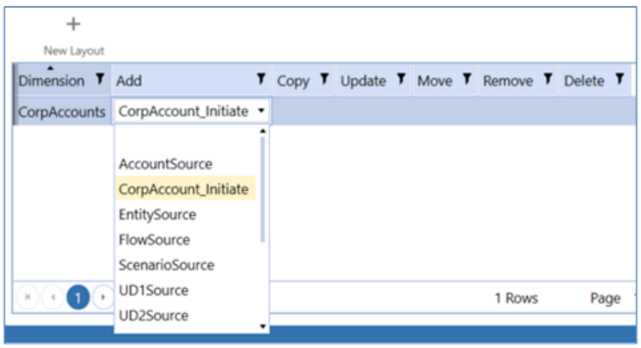
24. Repeat the previous step and add the Approval and Commit steps. The result should look like this:



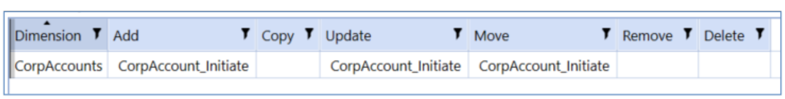
25. Next, in the grid, select the **Initiate** step. On the right-side pane above the **Layout Assignment** grid, you should see the title change to **Initiate CorpAccts (Initiate)**.



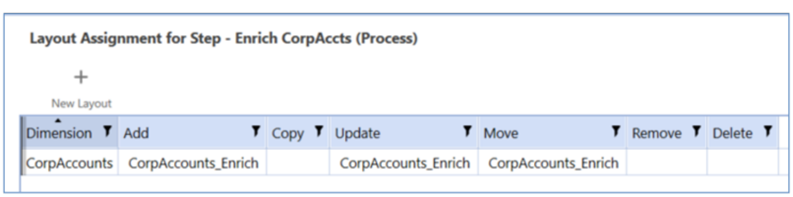
26. Since we want to allow Add, Update, and Move for this profile, we need to assign a layout to these actions to activate them. Click the **Add** column cell to open a drop-down list. Select the **CorpAccounts_Initiate** layout that we just created.



27. Assign the same layout to Update and Move actions. Make sure to click the **Save** button before you continue. The result should look like this:

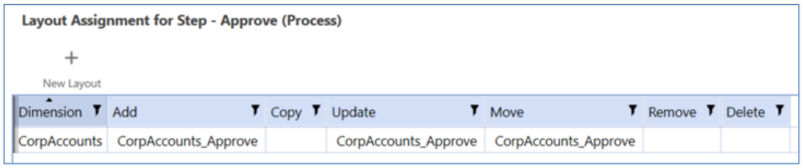


28. Select the **Enrich** step, and assign the enrich layout to the same Add, Update, and Move actions.

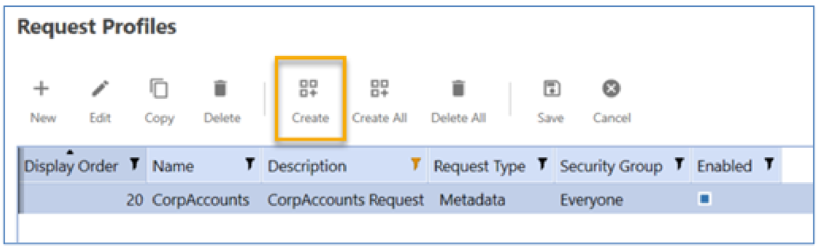


> **TIP:** Check the title to confirm you are on the correct step.

29. Repeat the process to assign the layout to the Approve step.

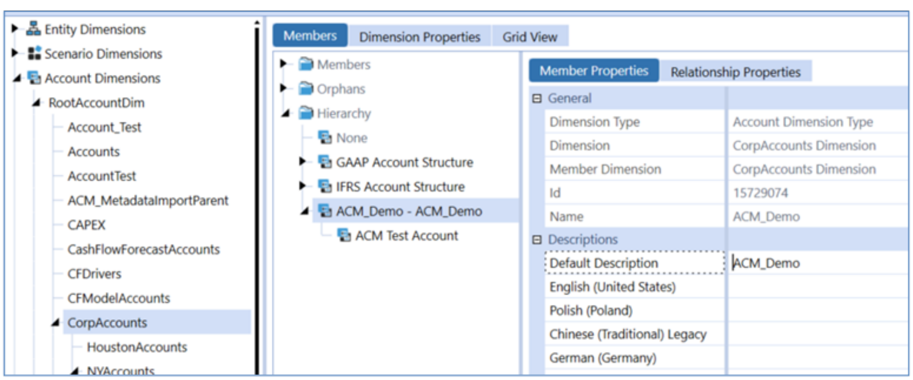


30. Save the Request Profile and navigate to the **Request Profile** page. Select the **CorpAccounts Request** line and click the **Create** icon to generate the dynamic dashboard. The request profile setup is now complete.



Create a User-initiated Request

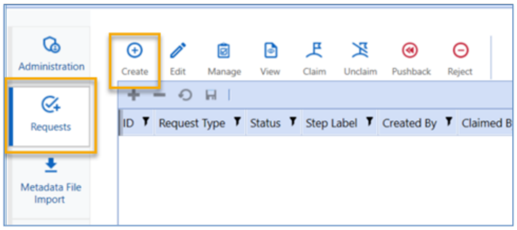
This is the current hierarchy for our CorpAccounts:

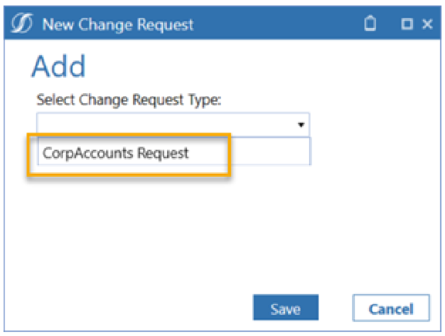


Our objectives in this exercise are to submit a single change request with the following three line items:

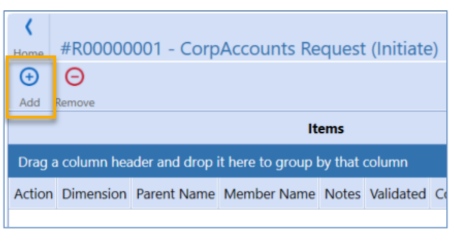
- Create a new parent called Sample Parent under ACM_Demo and create a new child called Sample Child under this new parent.
- Move the ACM Test Account under the new Sample Parent.
- Update the description of ACM_Demo to Demo Account Hierarchy.

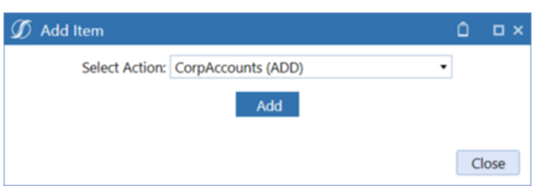
1. On the left navigation panel, select **Requests** and click the **Create** icon. A window will open. Select **CorpAccounts Request** and click the **Save** button.





2. On the **Request Detail** page, click the **Add** icon and select **CorpAccounts (ADD)**.

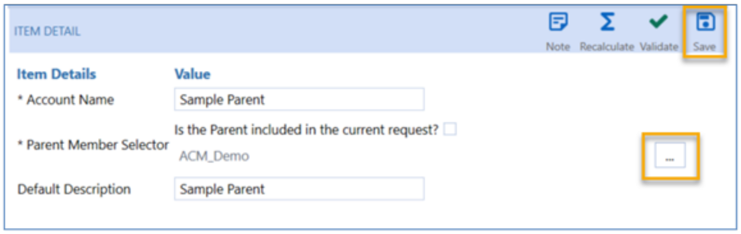




3. The properties display in the **Item Detail** section.

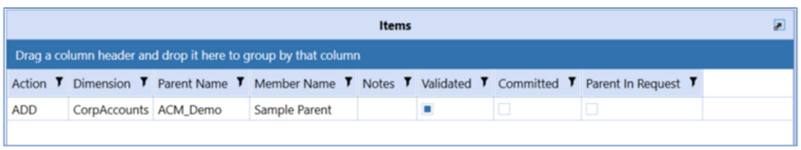
> **TIP:** If there are no properties showing, make sure you have clicked on Create on the Request Profile page to generate the dynamic dashboard.

Input the values and click the **Save** icon.



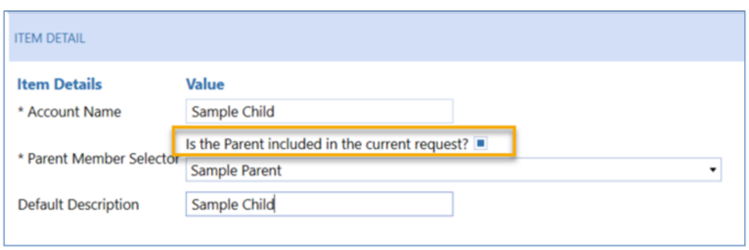
> **TIP:** Click the ellipsis to open the Member Selector window.

4. The item grid should be refreshed and the first line item is displayed.

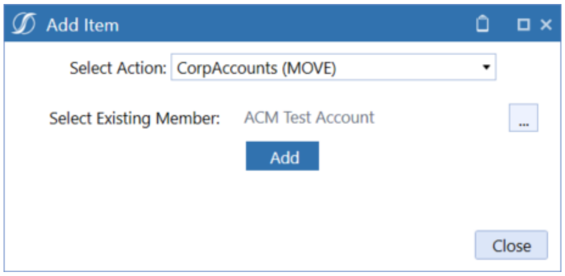


5. Next, we will add the Sample Child member. Click **Add** and select **CorpAccounts (ADD)** again. Since ACM_Demo is a new parent, we will select the **Is the Parent included in the current request?** check box.

   Click **Save** to save the line item.

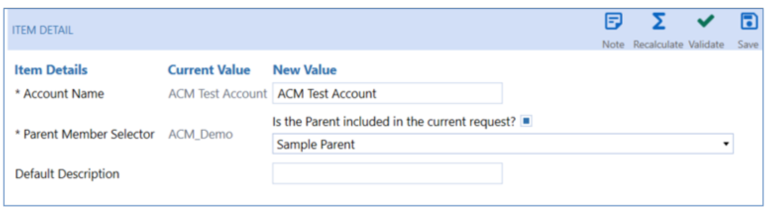


6. Next, click **Add** and select **CorpAccounts (MOVE)**. Select the member **ACM Test Account** and click the **Add** button.

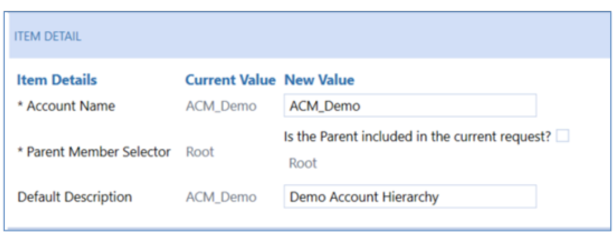


7. In the ITEMDETAIL, you should see the **Current Value** and the **New Value** columns. Select the **Is the Parent included in the current request?** check box and change the new parent to be **Sample Parent**.

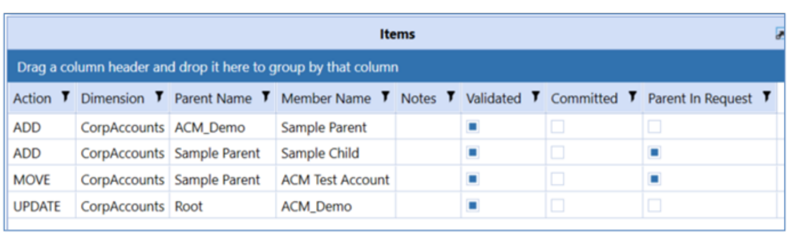
   Click the Save icon to save the line item.

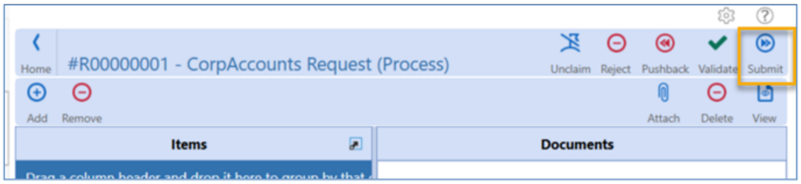


8. Next, click Add and select **CorpAccounts (UPDATE)**. Change the description for ACM_ Demo to be **Demo Account Hierarchy**.

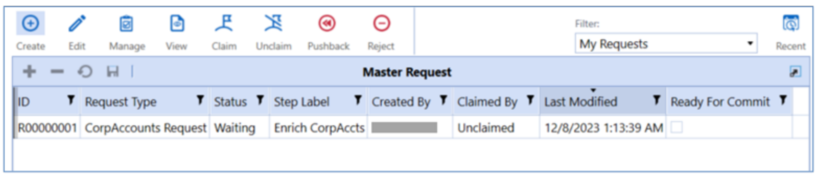


9. The Items grid should look like this. Click the **Submit** icon to go to the next Enrich step.

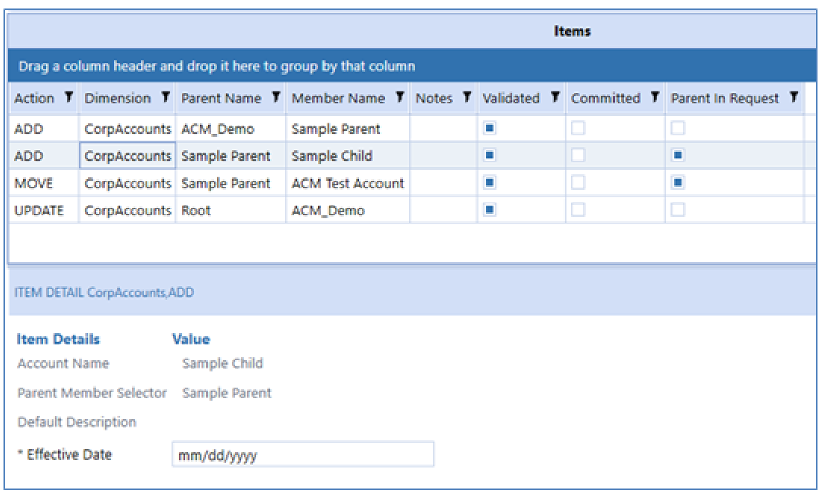




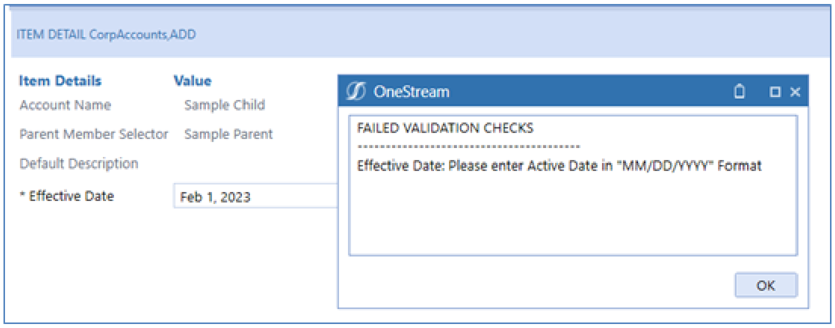
10. You should now be on the **Request Home Page** and the request status and step label should be changed to **Waiting** and **Enrich CorpAccts**. The Initiate step is now complete.



11. As an Enricher, select the request and select **Manage** to open the Request Detail page. Select the new member **Sample Child** line item and you should see the **Effective Date** property in the ITEM DETAIL section. Notice the other properties are not editable.

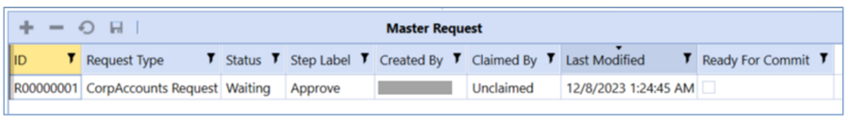


12. To test the date format validation, type Feb 1, 2023 in the box and click **Save**. You should receive an error message.



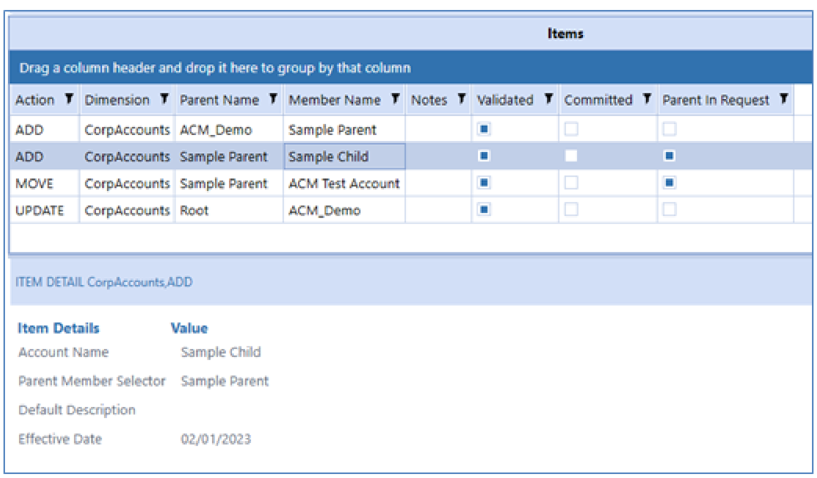
13. Now enter 02/01/2023 and click **Save** again. It should save this time. Click **Submit** to proceed to the next Approval step.

14. The request status and step label have now changed to **Waiting** and **Approve**.



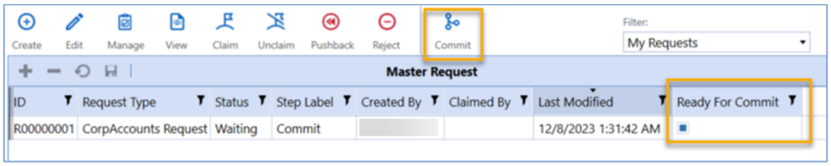
ID	Request Type	Status	Step Label	Created By	Claimed By	Last Modified	Ready For Commit
R00000001	CorpAccounts Request	Waiting	Approve		Unclaimed	12/8/2023 1:24:45 AM	☐

15. As an Approver, select the request and click **Manage** to open the **Request Detail** page. Notice all properties are now read-only. Click **Submit** to proceed to the next step.

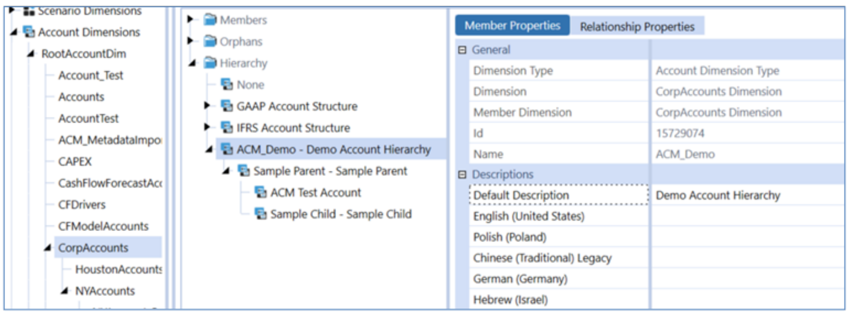


Action	Dimension	Parent Name	Member Name	Notes	Validated	Committed	Parent In Request
ADD	CorpAccounts	ACM_Demo	Sample Parent		☑	☐	☐
ADD	CorpAccounts	Sample Parent	Sample Child		☑	☐	☑
MOVE	CorpAccounts	Sample Parent	ACM Test Account		☑	☐	☑
UPDATE	CorpAccounts	Root	ACM_Demo		☑	☐	☐

16. The request status and step label have now changed to **Waiting** and **Commit**. Notice the **Ready to Commit** is selected by default. As an Administrator, click the **Commit** icon on the home page to commit the request.



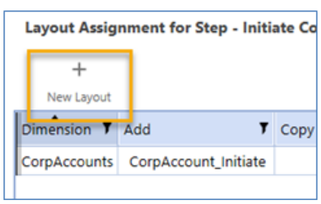
17. Finally, navigate to **Application** > **Dimension Library** and you should now see your changes reflected in the CorpAccounts dimension. The change request process is now complete.



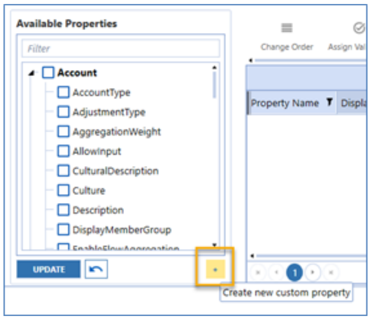
Tips

After you familiarize yourself with the various administration components needed to complete a Request Profile, there are some tips to make the setup process even easier with fewer clicks.

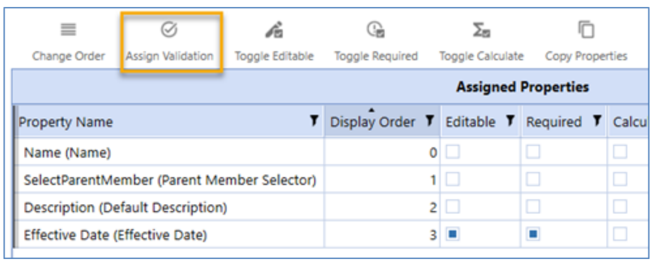
- Instead of going to the Layouts page to create a new layout, you can create a layout on the Request Profile editing page using the **New Layout** icon.



- Rather than using the Properties page to create a new custom property, you can do so directly on the **Layout** editing page. Use the **+** icon at the bottom of the **Available Properties** pane to open the properties editing page.



- On the Layout editing page, you can assign a validation to a property by clicking the **Assigned Validation** icon rather than going to the Validations page to do the assignment.

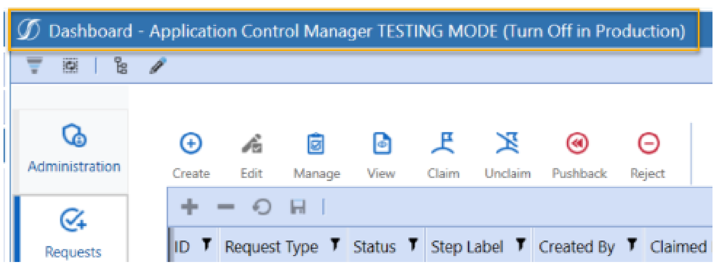


Turn On or Off Testing Mode

Approval steps with attached security groups can be temporarily turned off to make the process quicker when in development or testing.

1. Navigate to **Application** > **Dashboard** > **Workspaces** > **Application Control Manager (ACM)**
2. Under **Parameters**, locate **TestEnvironment_ACM**
3. Change the Default Value to **True** to turn on the testing mode or **False** to turn it off.

The application banner will indicate when testing mode is enabled.



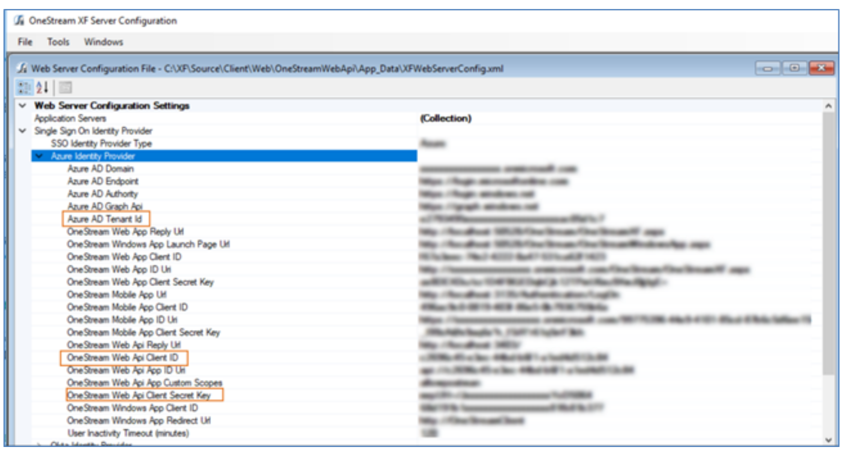
Setup Migrate Request Environment

The Migration feature of Application Control Manager keeps the dimension hierarchies between two OneStream installations or applications aligned with one another by migrating the requests.

This is accomplished by using the REST API built into OneStream. The REST API in the source environment requires setup on the server side to ensure that the correct configuration is in place. Request the following details for your Azure Single Sign-on configuration from your technical support representative:

- Azure AD Tenant ID
- OneStream Web API Client ID
- OneStream Web API Client Secret Key
- Source OneStream System URL
- Source OneStream System Application Name

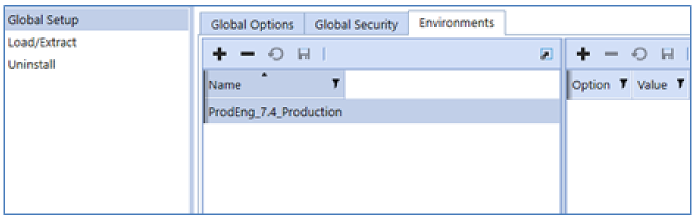
The first three values can be found in the OneStream WebServerconfig.xml:



Setup Remote Source Server Environment

You must set up a Remote Source Server Environment to start Migration.

1. Navigate to **Settings** > **Global Setup** > **Environments**.
2. Click **+** in Name Table Editor.
3. Create and enter an **Environment Name** under the Name field.
4. Save the environment name.



Create Environment Options

Next you must create the Environment that surrounds the source system.

1. Click **+** in Options / Value Table Editor.
2. Click the Option column to display the list of Environment Options.

> **NOTE:** If the remote server is a OneStream IdentityServer (OIS) with a personal access token (PAT), only the ClientUrl, ClientApp, and PAT options are necessary.

> **NOTE:** If the remote server is a Legacy Azure SSO Environment, TenantID, Client ID, ClientKey, ClientUrl, and ClientApp options are necessary. PAT is not needed.

The TenantID, ClientID, ClientKey, and ClientUrl can all be found in the Server XFConfig file under the following keys:

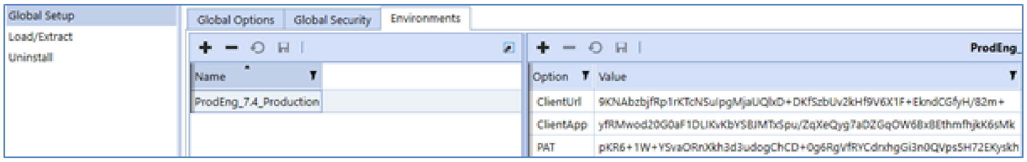
TenantID: AzureADTenantId

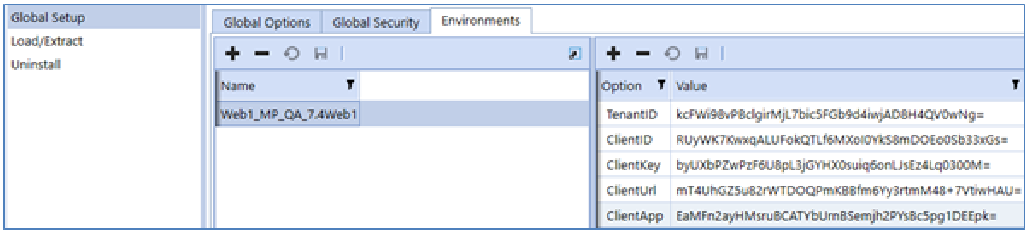
ClientID: AzureADClientId

ClientKey: AzureADWebApiSecretKey

ClientUrl: XFWebApiUrl (only the URL's protocol and domain are needed)

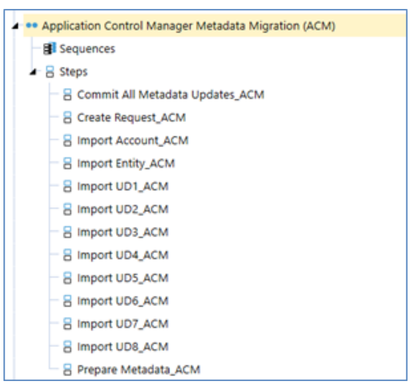
ClientApp is the remote server's application that is being used for Migration.



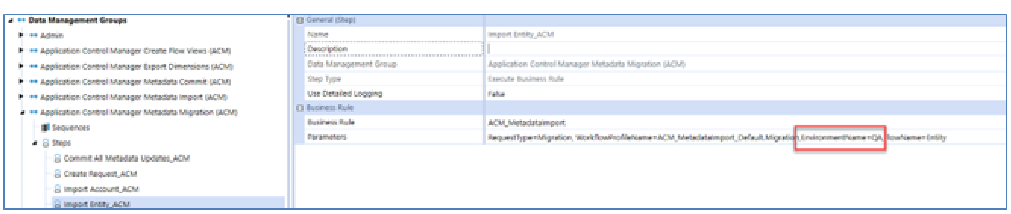


Data Management Job Configuration

The metadata synchronization process is run using a Data Management job in OneStream. When Application Control Manager is installed, a Data Management Group named Application Control Manager Metadata Migration (ACM) containing associated steps is automatically created:



As with other features in Application Control Manager, there is a step associated with each of the dimensions in OneStream. To complete the setup, you must update the **Parameters** section of the step. The default parameters are entered in the initial setup step from Application Control Manager:



- The Request Type is set to Migration and should not be changed.
- The WorkflowProfileName is set to ACM_MetadataImport_Default.Migration and should not be changed.
- The EnvironmentName is set to the environment name previously created in the Setup Remote Source Server Environment section.
- The RequestProfileName is set to the Request Profile Description that you plan to use for the Migration.

Execution

When any of the Data Management Load steps are executed, the following processes occurs:

- Prepare metadata on remote (source system)
    - Using the REST API that was configured in the Application Control Manager system administration screen, the system remotely executes a Data Management setup on the source system named Application Control Manager Metadata Migration (ACM) > Prepare Metadata.
    - This process gathers all metadata information including the member list, hierarchy, and properties for the dimension specified in the workflow profile. This information is stored in a temporary staging table in the database.
- Retrieve metadata from a remote system.
    - Using the REST API, make a built-in API call named GetAdoDataSetForSqlCommand on the remote system. The system pulls the information and loads it into the local (destination) OneStream application database for further processing.
- After the data is loaded into the database, the same processing that occurs during a metadata import takes place. If any updates are required, the system automatically generates a request, which can be committed using the **Application Control Manager Metadata Migration (ACM)** > **Commit All Metadata Updates Data Management** step.

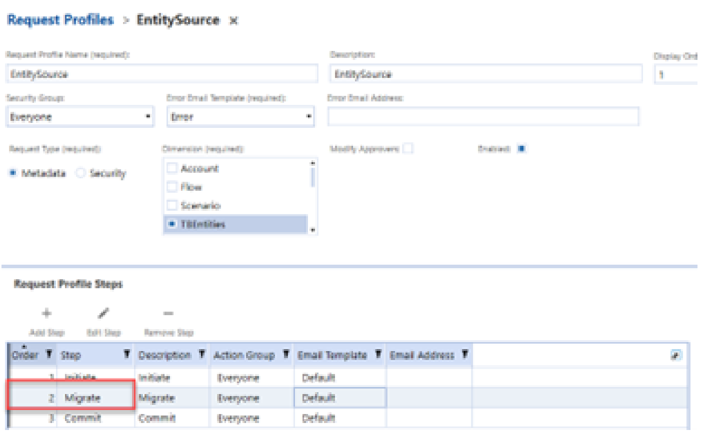
Configure Request Profiles with Migration Step

Application Control Manager can migrate requests from one OneStream environment to another. You can use this as a testing feature to see how metadata updates will impact a production system before committing them in that environment. You can also use it to keep two systems synchronized with each other.

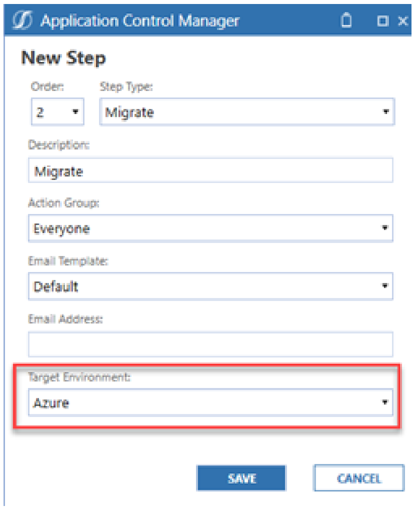
Before continuing, follow the setup steps outlined in the Metadata Synchronization section. You must set up a destination environment where requests will be sent.

If you have a large data set to migrate (>100k of data), make sure to increase your **Command Timeout** or **Task Inactivity Timeout** (minutes) settings under **Database Server Connections** > **Connection String Settings** > **Command Timeout or Application Server Configuration Settings** > **Task Inactivity Timeout** (minutes).

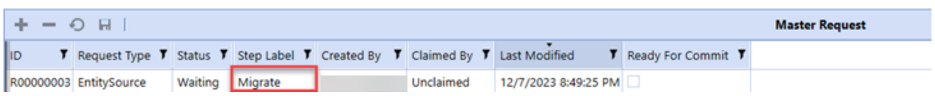
Add a new step to any request profile you have configured in the system. In the Application Control Manager administration screen, select Request Profiles and edit or create a profile to use for the migration. Add a new step to the profile after the Initiate step and select **Migrate**.



Select the appropriate target environment to commit the request to. This was defined in the prior configuration step. Select your Target Environment:



When you create a new request in the system and advance from the initiate step, you will see the system report the next step as **Migrate**:



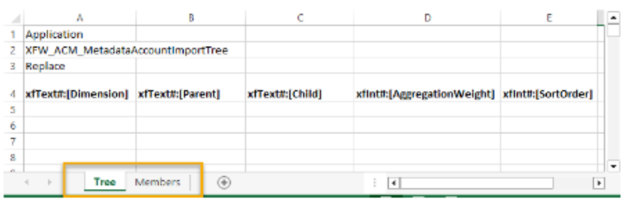
When you manage this request and advance to the next step, the system automatically connects to the target environment REST API and pushes the request information from the source system to the destination environment and automatically commits the request. After reviewing and testing in that environment, return to the source system and continue processing as you typically would.

Set Up Metadata Import Excel Template

This section guides you through how to create an Excel template to import metadata into Application Control Manager. When setting up your Metadata Import Template, if you do not specify a field for a specific member, that property will use the default option.

File Tabs

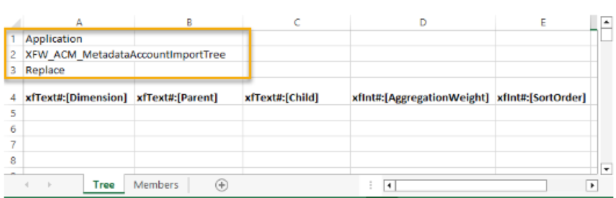
Create a new Excel file with two tabs: **Tree** and **Members**.



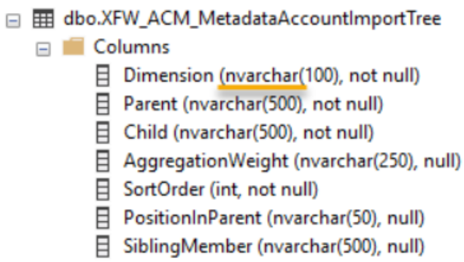
Headers

On the **Tree** tab, the first rows should be fixed to:

- **Row 1, Column A**: Application
- **Row 2, Column A**: XFW_ACM_[Dimension Tree Table Name] (See Import Add-On Staging Tables for the full name.)
- **Row 3, Column A**: Replace
- **Row 4**: Property name with a prefix of xfText#:[ ] or xfInt#. The order of column names must match the order in the associated Layouts.

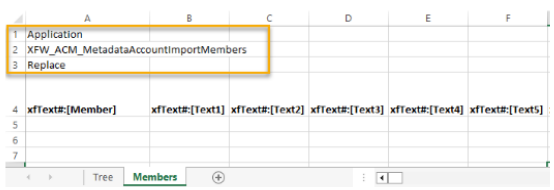


NOTE: The property field type can be found in the database columns definition. For example, nvarchar is a Text type.



On the **Members** tab, the first rows should be fixed to:

- **Row 1, Column A**: Application
- **Row 2, Column A**: XFW_ACM_[Dimension Member Table Name]
- **Row 3, Column A**: Replace
- **Row 4**: Property name with a prefix of xfText#:[ ] or xfInt:#. The order of column names must match the order in the associated Layouts.



Named Range

Application Control Manager looks for the Named Range defined in the Excel file to determine what to import. Ensure the ranges cover the entire data set in your file. The two required name ranges are:

- **xftProjectTree**: Refers to ranges in the Tree tab
- **xftProjectMembers**: Refers to ranges in the Member tab

Import Shared Members and Varying Properties

When importing metadata containing shared members or varying properties, ensure that each shared member and varying property combination is separated by different rows. For shared members, make sure all properties are identical.

Example showing a shared member setup in the **Tree** tab:

Dimension	Parent	Child	Aggregation Weight	Sort Order
Account	GAAP	Shared Member	1	1
Account	IFRS	Shared Member	1	10

Example showing a shared member with varying properties by **Time** in the **Members** tab:

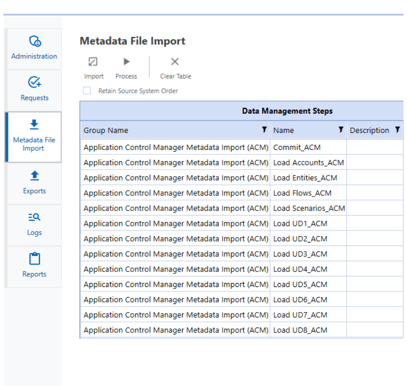
Member	Input Frequency	Time Val
Scenario Member	HalfYearly	2018
Scenario Member	Quarterly	2019
Scenario Member	Yearly	2020

Example showing a shared member with varying properties by **Scenario** type and **Time** in the **Members** tab:

Member	Formula	Scenario Type	Time Val
10000 - Cash Deposits	Sample Formula 1	Actual	2023Q1
10000 - Cash Deposits	Sample Formula 2	Budget	2023Q1
10000 - Cash Deposits	Sample Formula 3	Actual	2023Q2

> **NOTE:** The Remove Stored Item feature available in User-Initiate requests or the OneStream Dimension Library is not functional with Metadata Import process. To remove a stored item or revert to the property default value for **Vary By Scenario Type and Time** properties, either manually update in the Dimension Library or use the User-Initiate request process.

You can give the file any name and save it in any folder location. To upload the Excel template, select Metadata File Import from the left navigation panel. Click Import, and the Windows File Explorer browser will display for you to navigate to the file within your selected folder.



Set Up Custom Metadata File Import

You can set up Application Control Manager to pull metadata from a file location of your choice or combine with PowerShell scripts and the Task Scheduler to fully automate the process.

You can also automate the import and commit steps to no longer include user interaction before committing the request. Additionally, you can add a required step for individuals on the Finance team to review and enrich the request before manually committing it into the system.

Manage the following components if you are setting up a custom Metadata File Import process in Application Control Manager:

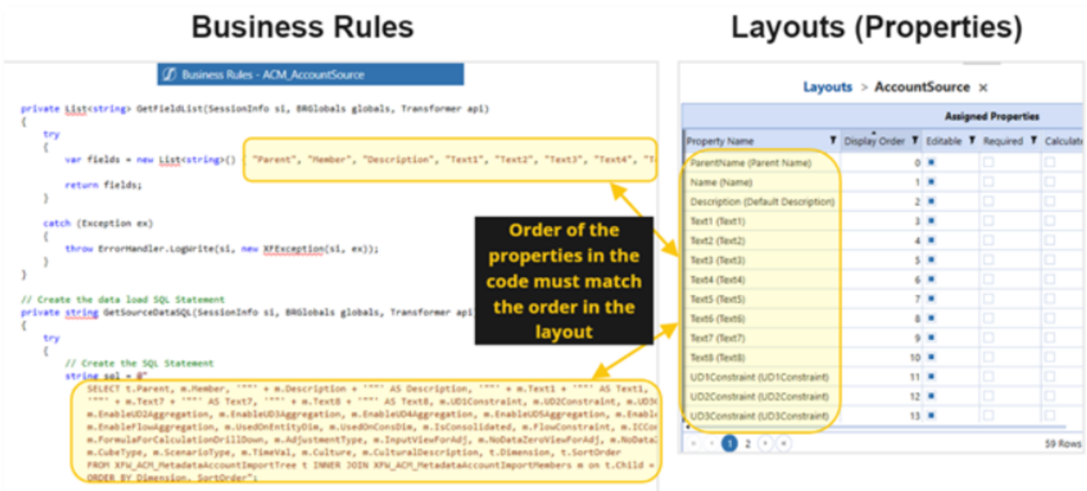
Define Metadata Import Properties

The pre-installed layouts contain all properties associated with the dimension type. You can modify these layouts so that the properties you want to maintain are included. After you have defined these properties, ensure the Business Rule Connector is coded with the same set of properties and in the same order as the layout.

Set Up Business Rules

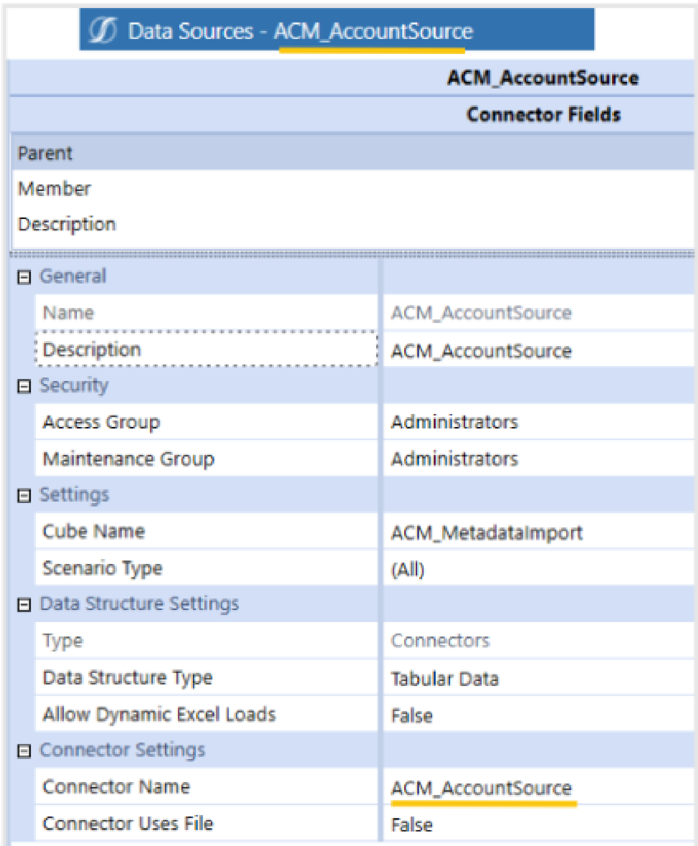
The pre-installed Business Rule Connector can be modified, or you can create your own. Ensure the properties coded in the Business Rule Connector match the layout that you want to use for the import process.

> **NOTE:** It is important that both the properties and the order of properties match between the layouts and the Business Rules.



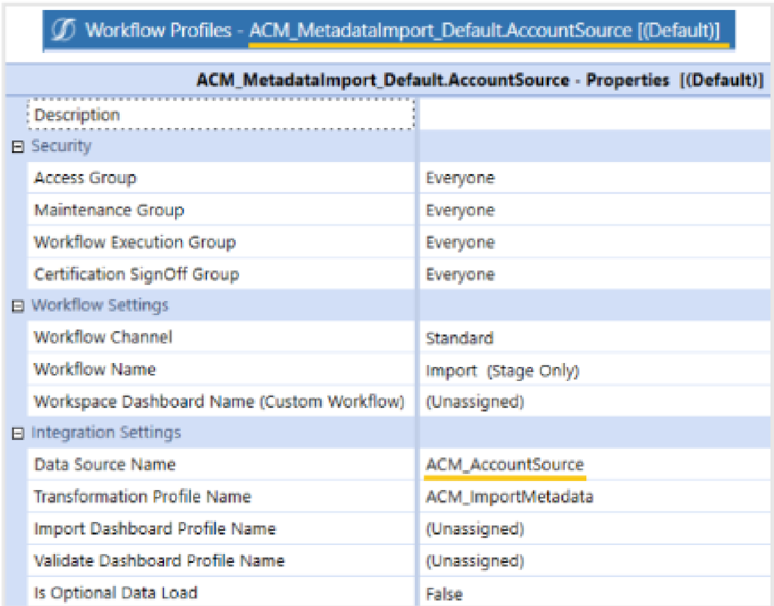
Set Up Data Sources

You can modify the pre-installed Data Sources Connector or create your own. When creating your own, update the Connector Settings to reference the correct Business Rules.



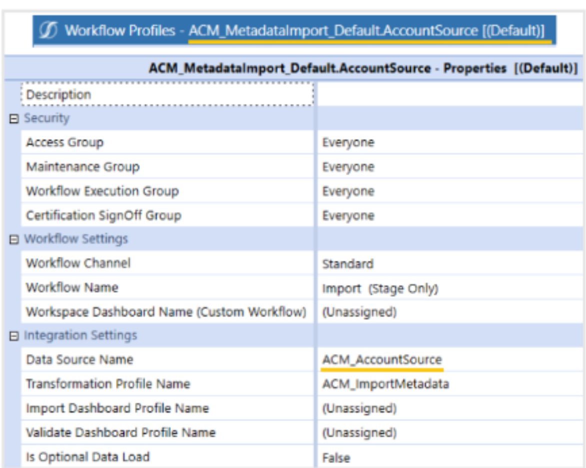
Workflow Profiles

Pre-installed Workflow Profiles can also be modified, or you can create your own. When creating your own, update the Data Source Name to reference the correct Data Sources Connector.



Data Management Groups

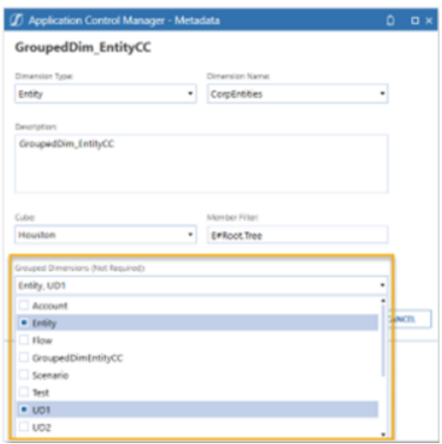
You can modify pre-installed Data Management Groups or create your own. When creating your own, update the Business Rule and reference the appropriate Workflow Profiles name.



Setup and Use Grouped Dimensions

The Grouped Dimensions feature is useful when updating a member that exists in multiple dimensions. When using this feature, note that the selected dimension name on the metadata will not be updated on a request with grouped dimensions. Only the group dimensions will be updated. The following is an example of how to setup Grouped Dimensions to add a member to both Entity and UD1 dimensions in a single request.

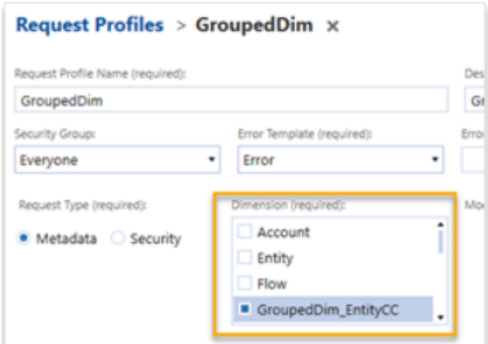
1. Navigate to the **Administration > Dimensions** page and ensure the dimensions you want to group are assigned to a Cube and Dimension Name.



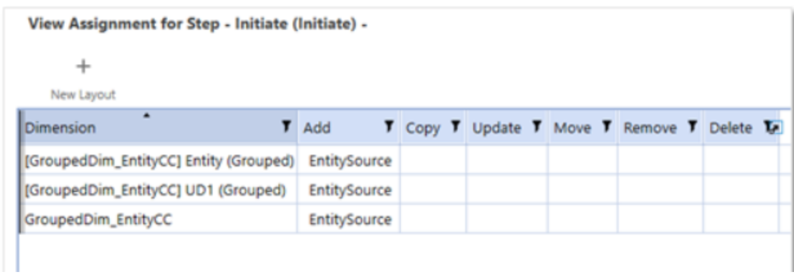
2. Select the **Create** icon to create a new Dimension assignment. Select the desired dimensions under the Grouped Dimensions drop-down.

> **NOTE:** A dimension cannot be grouped to itself, so the current dimension under edit will not be included in the list of dimensions eligible for grouping.

3. Next, create a **Request Profile** and select the newly created Grouped Dimension.

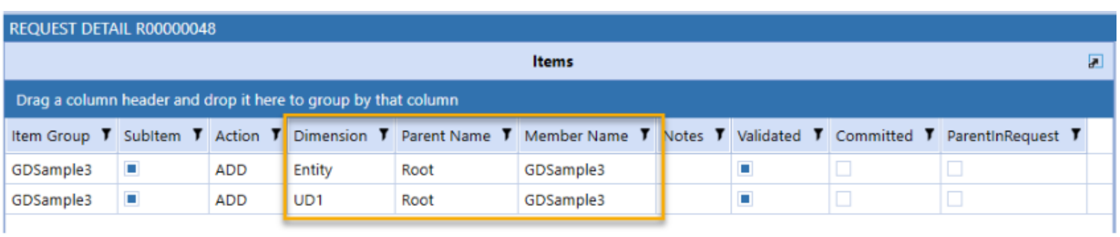


4. Assign the layouts to each action you want allowed in the request.



5. Return to the Request Profiles summary page and click on Create to generate the dynamic dashboards for the profile.

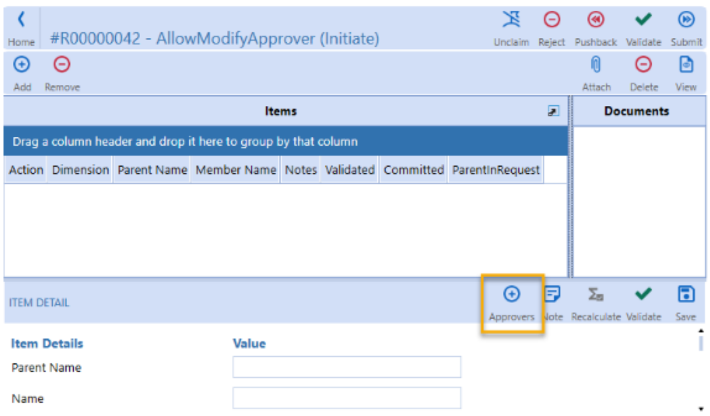
6. After a request is submitted, a line item will automatically be generated for the same member in both the Entity and UD1 dimensions.



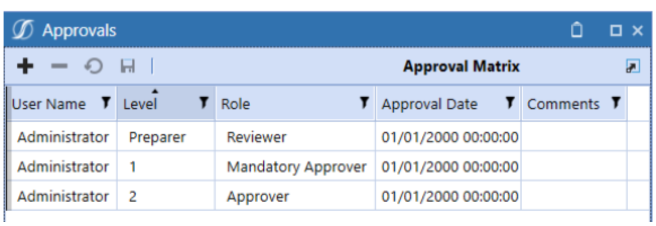
Use Modify Approvers

> **IMPORTANT:** Using the Modify Approvers feature will bypass the security groups in the Request Profile.

When the option to allow users to modify the approvers is enabled in the Request Profile, users will see the Approvers icon on the request page.



Within the Approval Matrix, additional users can be added as a Reviewer, Mandatory Approver, or Approver. The User Name drop-down displays all users in the applications. People listed in the matrix will have access to manage the request regardless of whether or not they belong to the security group configured in the Request Profile steps.



Create Custom Reports

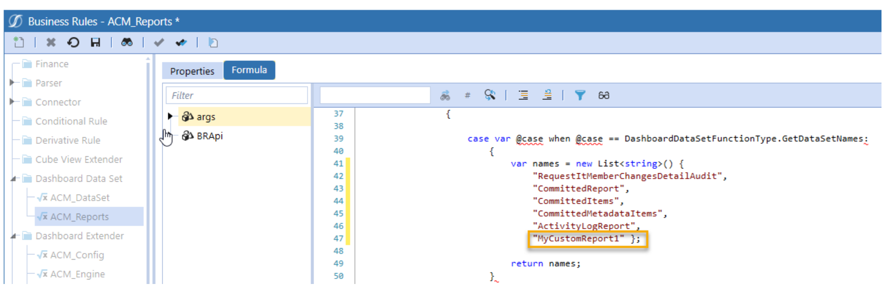
You can add custom reports using combinations of business rules, dashboard data adapters, dashboard components, and dashboards.

> **NOTE:** Any custom reports that use custom components are removed when performing an **Uninstall UI**. The ACM_Reports business rule is overwritten during an upgrade. Any customizations to this business rule must be backed up and merged into the updated business rule.

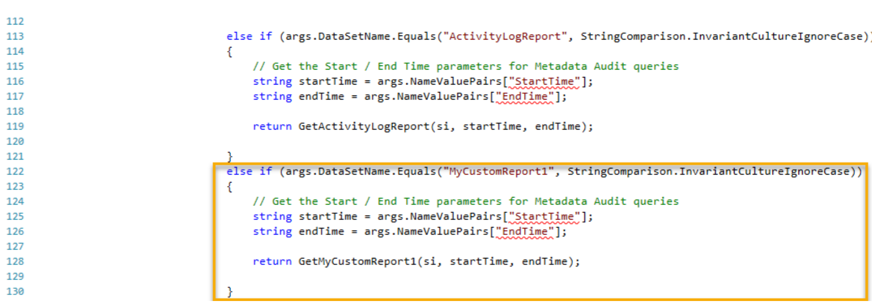
Follow the sample steps below to add a new custom report to show the values of the custom properties **FlowReason** and **FlowPriority**.

1. Add the report definition to the ACM_Reports by navigating to Business Rules > Dashboard Data Set > ACM_Reports.

2. Add the report to the list of reports. Be sure to add the comma to the previous line.



3. Copy and paste rows 112-121 and update for the new report name.



4. Insert the following code after line 331:

```
private DataTable GetMyCustomReport1(SessionInfo si, string startTime, string endTime)
{
    try
    {
        using (DbConnInfo dbConnFW = BRApi.Database.CreateFrameworkDbConnInfo(si))
        {
            using (DbConnInfo dbConnApp = BRApi.Database.CreateApplicationDbConnInfo(si))
            {
    endTime = endTime.Replace("/", "-") + " 23:59:59";

    // Create the data table to return
    var sql = new System.Text.StringBuilder();
                sql.Append("Select r.ID, r.RequesterID, r.Status, ");
                sql.Append("'Commit' As StepType, f.Label, r.LastModified, ");
                sql.Append("'" + startTime + "' As CriteriaStartTime, ");
                sql.Append("'" + endTime + "' As CriteriaEndTime, ");
            //For item level properties, use i.ItemProperties instead of r.RequestProperties
                sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowReason') As 
FlowReason, ");
                sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowPriority') As 
FlowPriority ");
            //FOR ITEM LEVEL PROPERTIES, UNCOMMENT NEXT 2 LINES
                // sql.Append("From " + ACM_Globals.m_ItemView + " i ");
                // sql.Append("RIGHT Join " + ACM_Globals.m_MasterRequestView + " r On i.FKRequestID 
= r.RequestID ");
                sql.Append("From " + ACM_Globals.m_MasterRequestView + " r ");
                sql.Append("INNER JOIN " + ACM_Globals.m_StepTable + " s ON r.FKStepID = s.StepID 
");
                sql.Append("INNER JOIN " + ACM_Globals.m_FlowTable + " f ON r.FKFlowID = f.FlowID 
");
                sql.Append("WHERE s.StepType = 3 AND r.Status = 'Completed' AND ");
                sql.Append("r.LastModified >= '" + startTime + "' And r.LastModified <= '" + endTime 
+ "' ");
                sql.Append("ORDER BY r.LastModified DESC");

                using (var dt = BRApi.Database.ExecuteSql(dbConnApp, sql.ToString(), false))
                {
                    dt.TableName = "MyCustomReport1";
                    return dt;
                }
            }
        }
    }
    catch (Exception ex)
    {
        Logger.Write(si, "Error getting Activity Log Report.", ACM_Globals.LogLevel.ERR, ACM_
Globals.LogCategory.AcmReports, ex);
        throw ErrorHandler.LogWrite(si, new XFException(si, ex));
    }
}
```

This is what it will look like in the business rule:

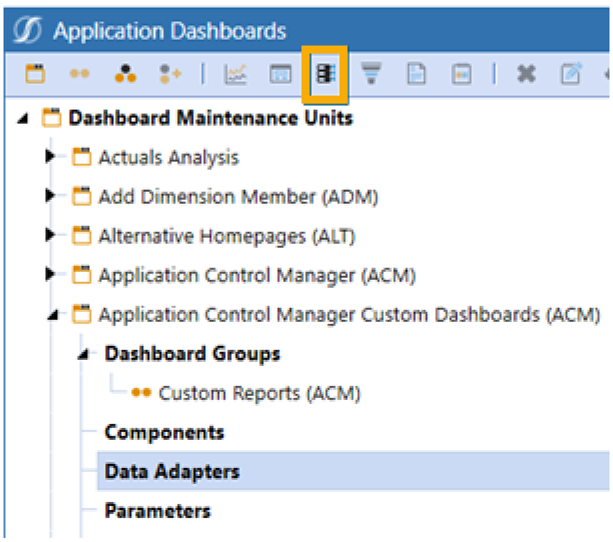
```
        private DataTable GetMyCustomReport1(SessionInfo si, string startTime, string endTime)
        {
            try
            {
                using (DbConnInfo dbConnFW = BRApi.Database.CreateFrameworkDbConnInfo(si))
                {
                    using (DbConnInfo dbConnApp = BRApi.Database.CreateApplicationDbConnInfo(si))
                    {
                        endTime = endTime.Replace("/", "-") + " 23:59:59";

                        // Create the data table to return
                        var sql = new System.Text.StringBuilder();
                        sql.Append("SELECT r.ID, r.RequesterID, r.Status, ");
                        sql.Append("'Commit' AS StepType, f.Label, r.LastModified, ");
                        sql.Append("'" +  startTime + "' AS CriteriaStartTime, ");
                        sql.Append("'" + endTime + "' AS CriteriaEndTime, ");
                    // For ITEM LEVEL Properties, use i.ItemProperties instead of
r.RequestProperties
                        sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowReason') AS
FlowReason, ");
                        sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowPriority') AS
FlowPriority ");
                    // For ITEM LEVEL Properties, UNCOMMENT NEXT 2 LINES
                        // sql.Append("FROM " + ACM_Globals.m_ItemView + " i ");
                        // sql.Append("RIGHT JOIN " + ACM_Globals.m_MasterRequestView + " r ON
i.FKRequestID = r.RequestID");
                        sql.Append("FROM " + ACM_Globals.m_MasterRequestView + " r ");
                        sql.Append("INNER JOIN " + ACM_Globals.m_StepTable + " s ON r.FKStepID =
s.StepID ");
                        sql.Append("INNER JOIN " + ACM_Globals.m_FlowTable + " f ON r.FKFlowID =
f.FlowID ");
                        sql.Append("WHERE s.StepType = 3 AND r.Status = 'Completed' AND ");
                        sql.Append("r.LastModified >= '" + startTime + "' AND r.LastModified <= '" +
endTime + "' ");
                        sql.Append("ORDER BY r.LastModified DESC");

                        using (var dt = BRApi.Database.ExecuteSql(dbConnApp, sql.ToString(), false))
                        {
                            dt.TableName = "MyCustomReport1";
                            return dt;
                        }
                    }
                }
            }
            catch (Exception ex)
            {
                throw ErrorHandler.LogWrite(si, new XFException(si, ex));
            }
        }
```

5. Compile the business rule to check the syntax.

Add Reports to the Application Control Manager Custom Dashboard

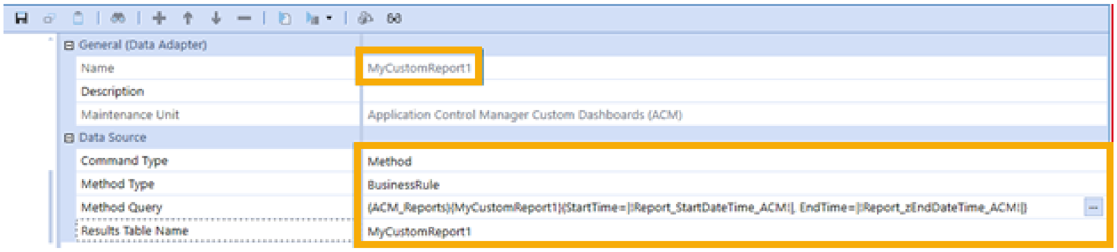
Add the reports to the Application Control Manager Custom dashboard as follows:

1. Click **Application Dashboards** > **Dashboard Maintenance Units** > **Data Adapters**.
2. Click **Create Data Adapter**.

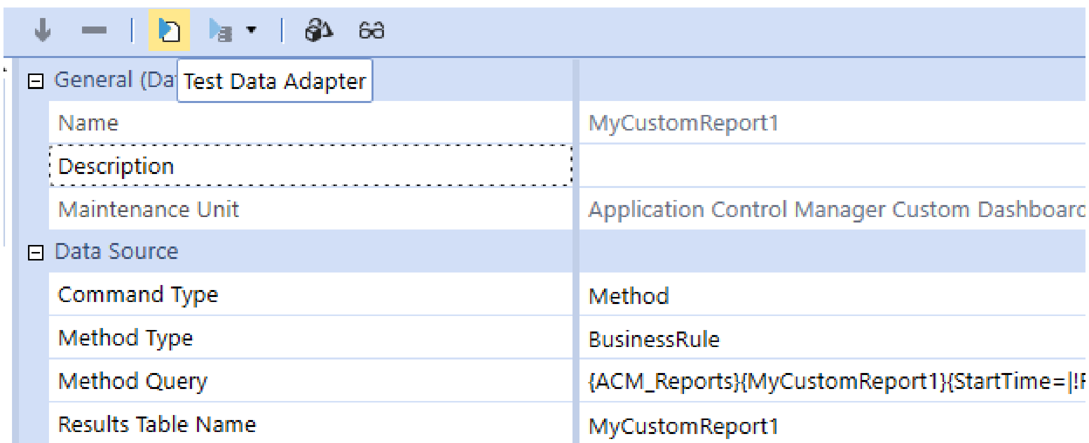


3. Enter a name for the data adapter.
4. For Command Type select **Method**.
5. For Method Type select **Business Rule**.
6. For **Method Query**, click the ellipsis and add the following:

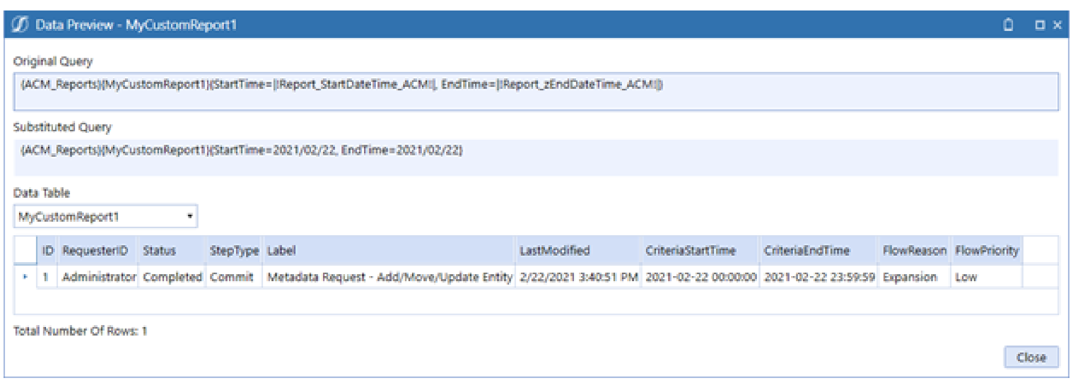
   {ACM_Reports}{MyCustomReport1}{StartTime=|!Report_StartDateTime_ACM!|, EndTime=|!Report_zEndDateTime_ACM!|}
7. In **Results Table Name** enter **MyCustomReport1**.



8. Click **Test Data Adapter** to test the adapter.



You should see similar results to this:



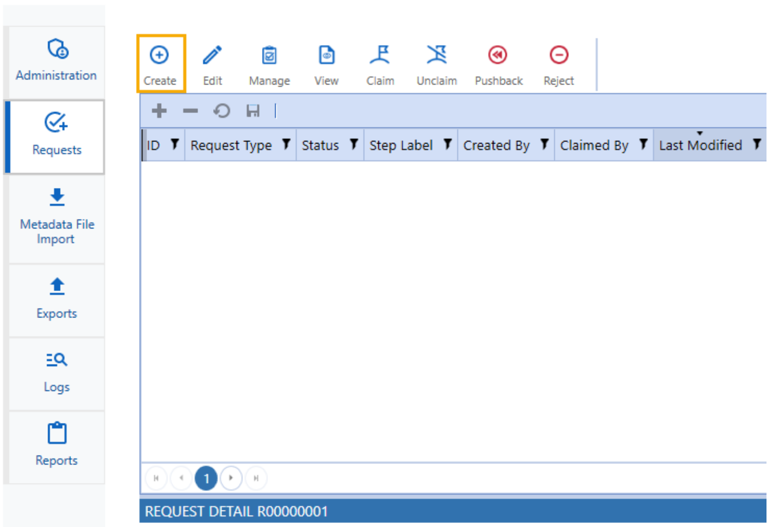
Use Mass Update

The following section illustrates how to use the mass update feature to add multiple line-items at once within a request.

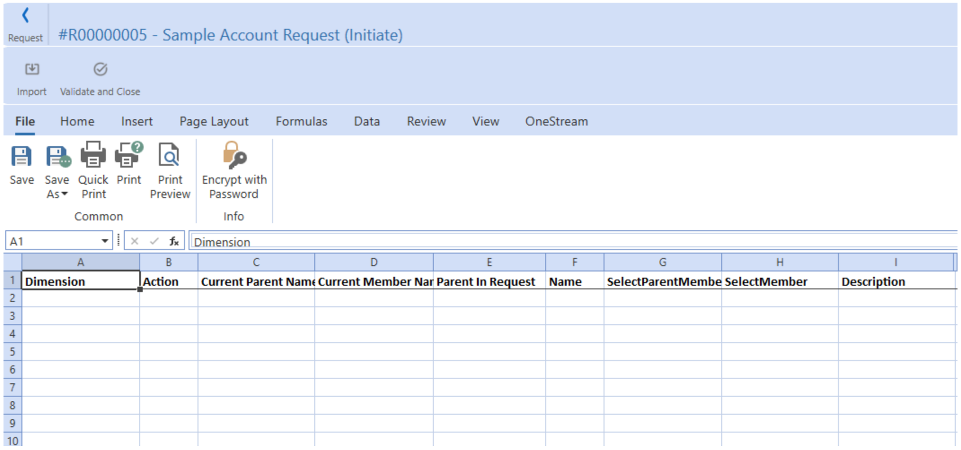
In this example we will:

- Use the OneStream spreadsheet to add multiple line items
- Import a XSLX or XSLM Excel file and append to mass update the request items
- Test the validations that run within the spreadsheet
- Edit individual line items that were added using Mass Update

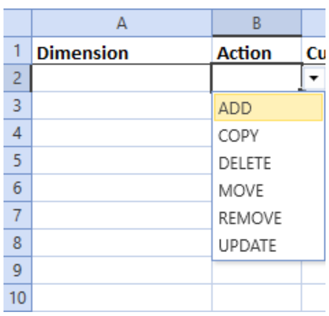
1. Go to the **Requests** page and select **Create** to start a new request.



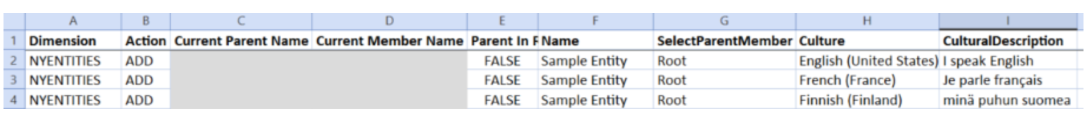
2. Click **Mass Update** to generate a dynamic spreadsheet. Each spreadsheet populates with three to five fixed columns, depending on the request type. These columns may include: Dimension, Action, Current Parent Name, Current Member Name, and ParentInRequest. The other headers reflect the properties assigned in the layout(s) assigned to your request.



3. Use the drop-down menus in the Action, Dimension, and ParentInRequest columns to fill those cells.



4. Information can be entered into each cell manually, or users can utilize Excel functions such as copy and paste and drag-down to fill spreadsheet rows.



Dimension	Action	Current Parent Name	Current Member Name	Parent In F	Name	SelectParentMember	Culture	CulturalDescription
NYENTITIES	ADD			FALSE	Sample Entity	Root	English (United States)	I speak English
NYENTITIES	ADD			FALSE	Sample Entity	Root	French (France)	Je parle français
NYENTITIES	ADD			FALSE	Sample Entity	Root	Finnish (Finland)	minä puhun suomea

5. To import a file into your Mass Update spreadsheet, first ensure your Excel file is in XSLX or XSLM format and meets the following standards for import:

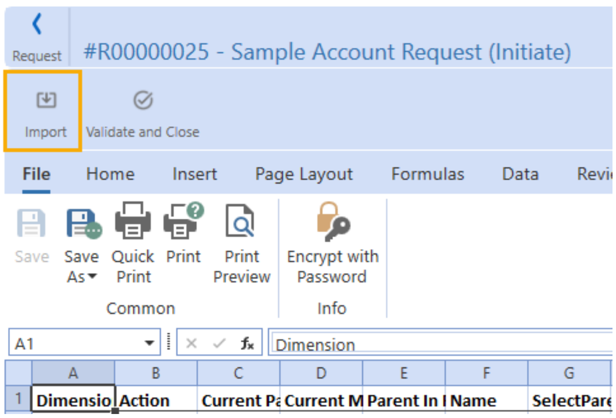
- Header property names within your file must match the **Property Names** as you see them when you generate the Mass Update spreadsheet.

> **TIP:** Generate a Mass Update spreadsheet in your application and click **Save As** to download the template onto your local file.

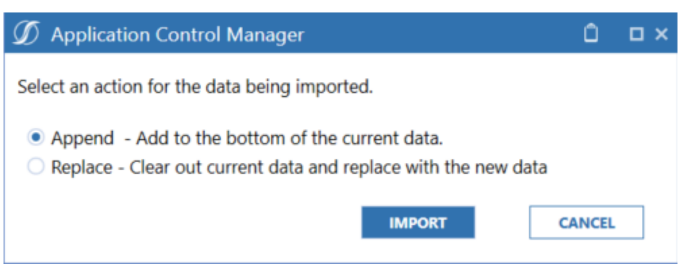
- The Excel file should consist of at least one tab titled **Line Items**.

> **IMPORTANT:** Additional tabs will not import into the Mass Update section. Any additional tabs will not be reflected in your spreadsheet after import.

6. While in the Mass Update spreadsheet window, click **Import** and select your file from the file explorer.

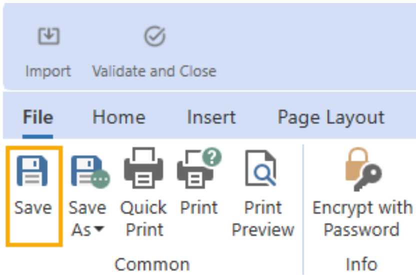


7. If data already exists within your Mass Update spreadsheet, a dialog window will prompt for your selection:



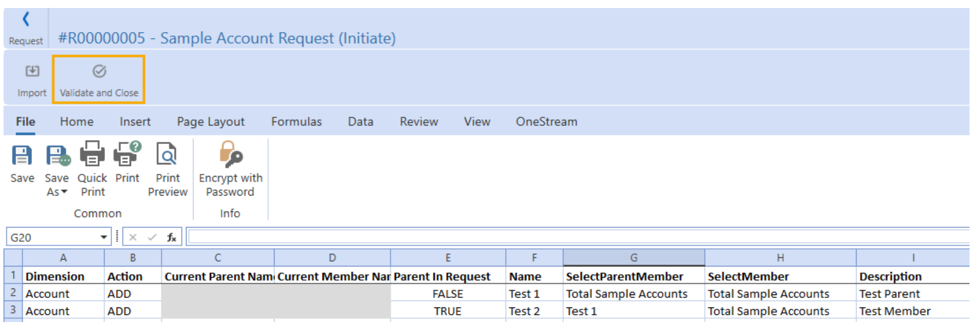
8. Select **Append** to proceed.

9. Now that your file has imported, click **Save** to save the newly entered line-items within the spreadsheet.

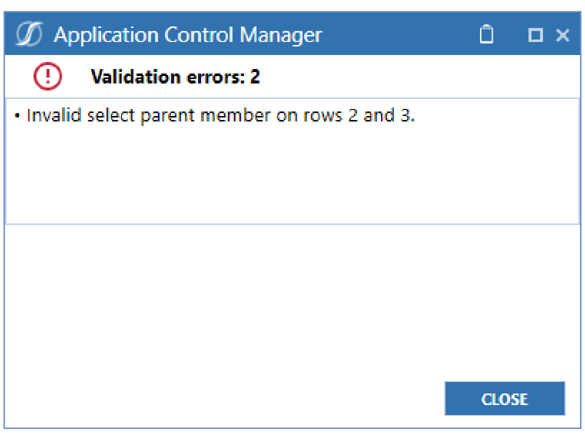


> **NOTE:** This does not apply spreadsheet changes to the Line Item table within the open request, this only saves the changes to the spreadsheet itself.

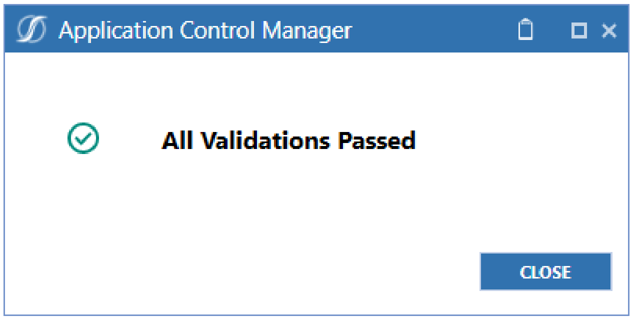
6. Once the line items have been entered manually, copied, or imported into the application spreadsheet, click **Validate and Close**.



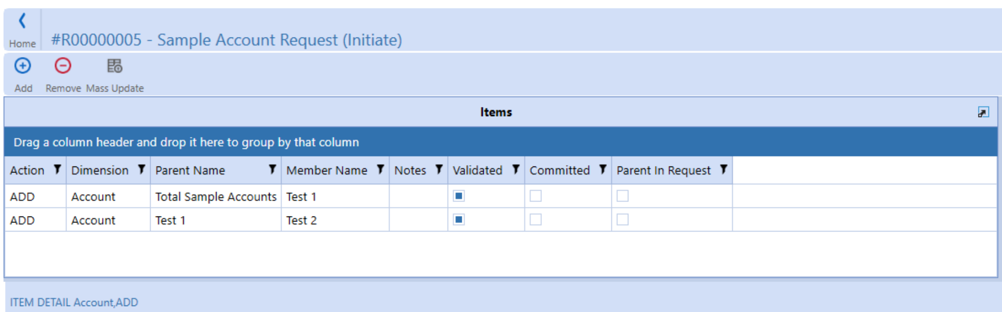
10. If any errors are caught, the changes will not be processed and dialog box like the one below will open.



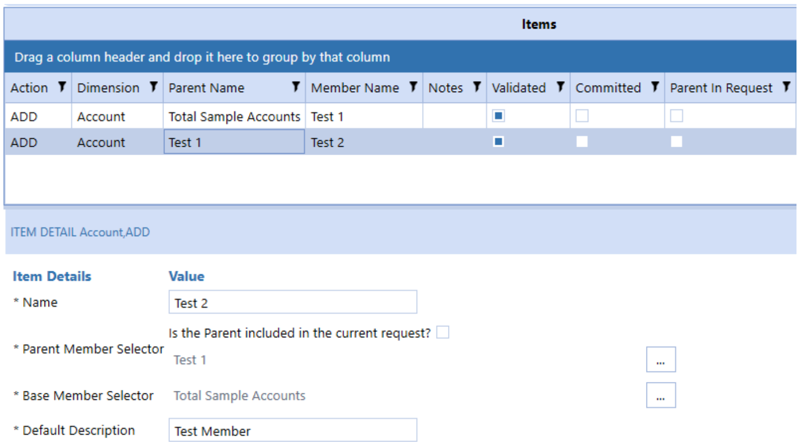
11. Once the errors have been resolved, click **Validate and Close** again. You will see this dialog box.



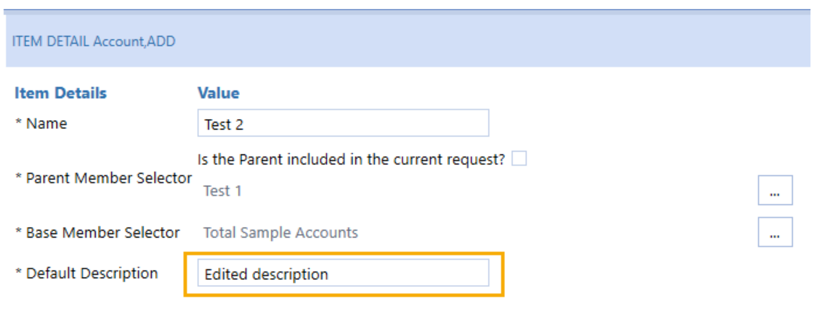
12. Now that we have used our spreadsheet to add the necessary line items, we can modify or remove individual items.



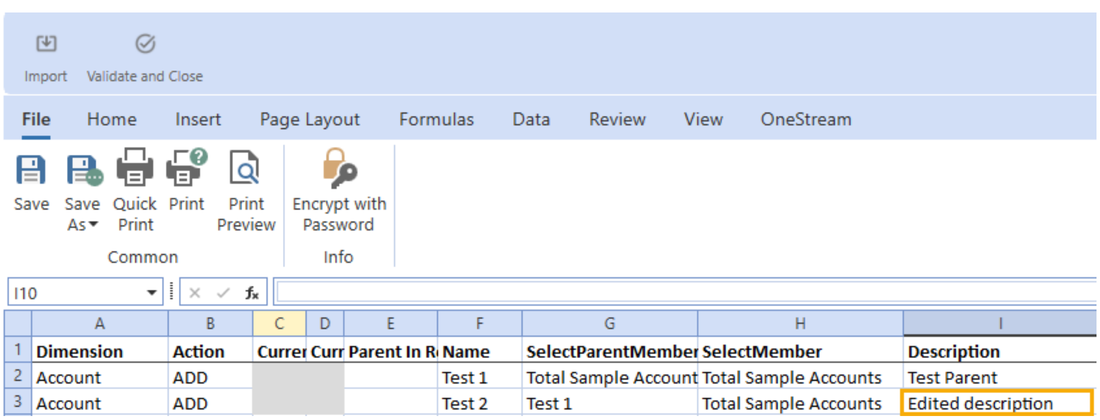
13. Select a line item to open the **Item Detail** page to view the item's properties. Here we can see that the information from our spreadsheet is filled into the required fields.



14. Edit the item details using the application page as normal and click **Save**.



15. Select **Mass Update** to generate a spreadsheet with the request line-items listed out and the changes made should now be reflected in the spreadsheet as well.



16. Once you're satisfied with the changes made to your line items, click **Submit** to push the request to the next step.

Help & Miscellaneous Information

This page contains solution documentation.

Display Settings

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

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

Package Contents & Naming Conventions

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

Example Package Name: `ACM_PV8.0.0_SV100_PackageContents.zip`

Identifier	Description
ACM	Solution ID
PV8.0.0	Minimum Platform version required to run solution
SV100	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 "Setup and Installation" on page 2 for Database Server Connection settings and installation details.

2. Data tables are created in the OneStream Development application during the solution installation. Using the Microsoft Data Migration Assistant, copy the data from the tables to the Production Microsoft SQL Server Database. Only the Microsoft SQL Administrator should run the migration assistant.

> **IMPORTANT:** This process has the potential to overwrite existing table data in the production application database if data already exists.

MarketPlace Solution Modification Considerations

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

- Major changes to business rules or custom tables within a MarketPlace solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.

- If changes are made to any dashboard object or business rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the MarketPlace solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.

- If modifications are made to a MarketPlace solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a dashboard do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.