



# Cloud Admin Tools Setup Instructions

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PV600 SV102

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# Table of Contents

Overview .....	1
User Management Console .....	1
Application Management .....	1
Key Management .....	1
Setup and Installation .....	2
Dependencies .....	2
Install Cloud Administration Tools .....	2
Set Up Cloud Administration Tools .....	3
Create Tables .....	3
Package Contents .....	4
Settings .....	5
Global Options .....	5
Email Connection .....	5
Domain .....	6
OneStream URL .....	6
Authentication Provider .....	6
Client ID .....	6
Uninstall .....	7

## Table of Contents

---

Home .....	8
User Management Console .....	10
User Details .....	10
Create User .....	12
Invite User .....	14
Send an Invitation .....	14
Import Users .....	15
Create Users Import Format .....	15
Invite Users Import Format .....	16
Import a Create/Invite User File .....	17
Delete User .....	17
Reset Password .....	19
Refresh .....	19
Security .....	19
Application Management .....	21
Application Details .....	21
Copy Application .....	22
Source .....	23
Target .....	23
Properties .....	23

## Table of Contents

---

Confirm Summary .....	25
Remove Application .....	26
Confirmation Summary .....	26
Application History .....	27
Key Management .....	29
Bring Your Own Key .....	29
Enable Key Management .....	30
Key Information .....	30
Disable Key Management .....	30
Refresh .....	30
Certificates (Available Only with Platform 8.0) .....	31
Upload Certificates .....	31
Certificate Versions .....	32
Refresh .....	32
View Snippet .....	32
Remove Certificates .....	32
Secrets (Available Only with Platform 8.0) .....	33
Upload Secrets .....	33
Secret Versions .....	33
Refresh .....	34

## Table of Contents

---

View Snippet .....	34
Remove Secrets .....	34
Help and Miscellaneous Information .....	35
Cloud Database Best Practices .....	35
Cloud Database Space .....	35
Display Settings .....	35
Package Contents and Naming Conventions .....	36
MarketPlace Solution Modification Considerations .....	36
Troubleshooting .....	37
Dashboard Rendering Errors .....	37

# Overview

Cloud Administration Tools is a solution that contains access to multiple cloud service functions, each enabling OneStream Cloud Administrators to perform their role with greater efficiency.

## User Management Console

The User Management Console manages the relationship between users hosted in the Microsoft Azure Active Directory (Azure AD) and OneStream Framework. With this console, a system administrator can self-manage their Azure AD users in OneStream by inviting, creating, deleting (disabling), and importing users and resetting passwords.

**NOTE:** User Management Console is only available with Azure AD hosted by OneStream Cloud Services and to members of the administrator's security group.

## Application Management

Application Management maintains OneStream applications in a cloud environment. System administrators can copy existing applications, and create, replace, or remove new applications within OneStream. With Application Management, administrators can make changes for testing or archival purposes.

This functionality is only available to members of the administrator's security group.

## Key Management

Key Management enables administrators to manage Azure Key Vaults by uploading .pfx encrypted files. Administrators on Platform 8.0 can manage secrets and certificates as well. The loss of service availability due to expired keys does not count against OneStream availability.

# Setup and Installation

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

See [MarketPlace Solution Modification Considerations](#).

**IMPORTANT:** If your environment Platform version is 6.0, or you use the User Management Console, the OneStream Cloud Support Team must perform all installation, setup, and configuration tasks. Contact OneStream Support for assistance. All others can install Cloud Administration Tools without assistance.

## Dependencies

Component	Description
OneStream 6.0.0 or later	Minimum OneStream Platform version required to install this version of Cloud Administration Tools.

## Install Cloud Administration Tools

1. On the OneStream MarketPlace Dashboard, go to **MarketPlace > Cloud Administration Tools**.



Cloud Administration Tools

2. On the **Cloud Administration Tools Solution** page, in the **Platform Version** drop-down list, select the appropriate OneStream Platform version.



## Setup and Installation

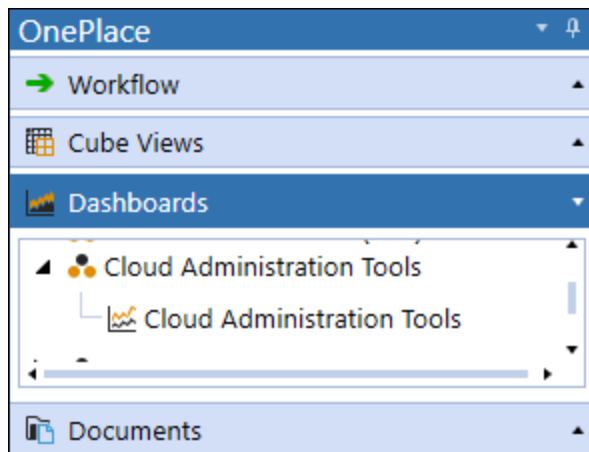
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3. In the **Solution Version** drop-down list, select the most recent version. Click **Download**.
4. Log into OneStream.
5. On the **Application** tab, go to **Tools > Load/Extract**.
6. On the **Load** tab, use the **Select File** icons to locate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

## Set Up Cloud Administration Tools

The first time Cloud Administration Tools is run, you are guided through the table setup process.

- In OneStream, go to **OnePlace > Dashboards > Cloud Administration Tools > Cloud Administration Tools**.

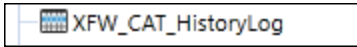
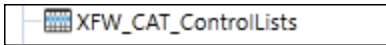


## Create Tables

1. Click **Step 1: Create Tables**.  
This step may be necessary when upgrading even if tables are already present. Cloud Administration Tools will not remove any tables that already exist but will modify table structures and add new ones if necessary.

## Setup and Installation

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2. When setup is complete, click **Step 2: Launch Solution** to open Cloud Administration Tools.

## Package Contents

The Dashboard Maintenance Unit provides the user interface for Cloud Administration Tools and includes the required Dashboard Groups, Components, Data Adapters, Parameters, and files.

# Settings



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

## Global Options

The **Global Options** page contains key properties that guide global Cloud Administration Tools administration.

Global Options  
Uninstall

Email Connection: OneStreamEmail

Domain: [Redacted]

OneStream URL: https://catmkp-dev.onestreamtest.com/OneStreamWeb

Authentication Provider: AzureSSO

Directory ID: [Redacted]

Client ID: [Redacted]

Client Secret: [Redacted]

Save

## Email Connection

Select an email connection from the drop-down list. The email connections are configured in the OneStream Application Server Configuration File and contain all the necessary setup information for the local email provider, including the sending email address, server credentials, host, and port. The email connections list is pulled from the Database Server Connections list in the Application Server Configuration File.

## Settings

---

For more details on email database connections, see the *Installation and Configuration Guide*. This setting can be changed by the administrator to send emails from a different connection.

### Domain

The Azure Active Directory (Azure AD) domain name is `@mydomain.onestreamcloud.com` and should not be modified with the exception of a direction by Support.

### OneStream URL

The Azure URL of the customer environment is `https://xxxxxx.onestreamcloud.com/onestreamweb` and should not be modified with the exception of a direction by Support.

### Authentication Provider

The name of the authentication provider service for the OneStream Framework database in this server environment. Do not modify this setting unless directed to do so by Support.

### Client ID

The client ID is configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by Support.

# Uninstall

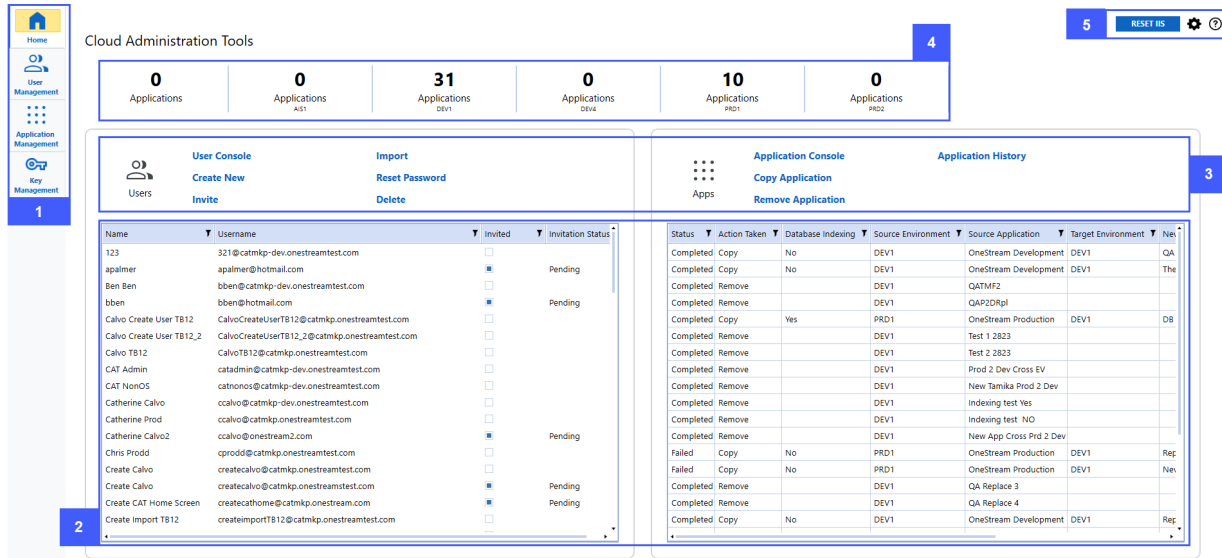
Use the Uninstall feature to remove the Cloud Administration Tools User Interface or the entire solution. If part of an upgrade, any modifications performed on standard Cloud Administration Tools objects are removed. These are the uninstall options:

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

**CAUTION:** Uninstall procedures are irreversible.

# Home

The Home page displays the functionality enabled through Global Settings.



## 1. Navigational Tabs

- **Home:** Enables system administrators to monitor users, applications, and key performance metrics in one centralized location.
- **User Management:** Enables system administrators to perform all user account maintenance tasks in a single interface.
- **Application Management:** Enables system administrators to create, replace, or remove applications within the OneStream Azure environment.
- **Key Management:** Enables system administrators to manage the key vault and Bring Your Own Key (BYOK) settings.

## 2. Overviews

- **User Management Overview:** Displays a list of users, their type, and current status, such as active or inactive.

- **Application Management Overview:** Displays a list of applications, their type, and current status, such as active or inactive.

### 3. Quick Links

System administrators can use quick links to navigate through the solution to perform key tasks.

### 4. Key Performance Indicators (KPIs)

KPIs display an overview of the environment. Use the scroll bar to view additional metrics.

### 5. Settings


- **Reset IIS:** This button manually resets the environment.

**IMPORTANT:** Performing an IIS reset ends all tasks currently in progress.

- **Settings:** Icon that provides access to the Settings page.
- **Help:** Icon that links to solution documentation.

**TIP:** If the Home screen displays any errors or fails to render, see [Troubleshooting](#).

# User Management Console

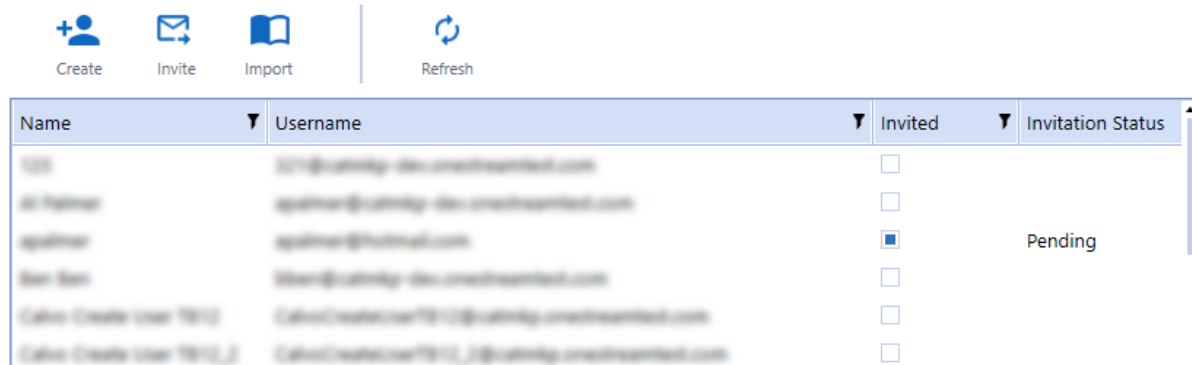
 The User Management Console displays a grid containing all Azure AD users and their related actions.

Administrators running Platform 6.x and who currently have access to the User Management Console, can create, invite, import, and delete users and reset user passwords.

When launched, the User Management Console displays a user list in a grid view, which shows the following information about each user:

- **Name:** User's name in OneStream.
- **Username:** User's Azure AD username.
- **Invited:** Indicates if the user was invited from an external Azure AD tenant.
- **Invitation Status:** Indicates if the user responded to the invitation.

## User Management Console



Name	Username	Invited	Invitation Status
100	100@adfs01g-dev.onestreamtest.com	<input type="checkbox"/>	
101	101@adfs01g-dev.onestreamtest.com	<input type="checkbox"/>	
102	102@adfs01g-dev.onestreamtest.com	<input checked="" type="checkbox"/>	Pending
103	103@adfs01g-dev.onestreamtest.com	<input type="checkbox"/>	
104	104@adfs01g-dev.onestreamtest.com	<input type="checkbox"/>	
105	105@adfs01g-dev.onestreamtest.com	<input type="checkbox"/>	
106	106@adfs01g-dev.onestreamtest.com	<input type="checkbox"/>	

## User Details

The following user details are displayed if the Azure AD member is a OneStream user:

### User Info



## User Management Console

---

- Name
- Description
- Ext Auth Provider
- Ext UserName
- Email
- Is Enabled
- Culture Code

### User Logon History

- Application Name
- Logon Type
- Logon Time
- Last Activity Time
- Logoff Time

### User Groups

- Group Name
- Group Description

# User Management Console

User Management Console



Create Invite Import Refresh

Name	Username	Invited	Invitation Status
and	and@catm.com	<input checked="" type="checkbox"/>	Pending
Shawn Clarke	shawn@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Shawn Clarke1	shawnclarke@gmail.com	<input checked="" type="checkbox"/>	Pending
Tom Alby	talby@catm.com	<input checked="" type="checkbox"/>	Accepted
Shawn Prud	shawnprud@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
shawn	shawn@catm.com	<input checked="" type="checkbox"/>	Pending
Shawn Clarke2	shawnclarke@gmail.com	<input checked="" type="checkbox"/>	Pending
Shawn	shawn@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
shawn	shawn@catm.com	<input checked="" type="checkbox"/>	Pending
Shawn Spren	shawn@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Shawn Spren	shawn@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Tom Alby	talby@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Tom Das	tdas@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
test	test@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
test	test@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Import mode 1812.2	test@catm.com	<input checked="" type="checkbox"/>	Pending
Shawn Prud	shawn@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Shawn Prud	shawn@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Theodore	theo@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Test invite1	testinvite1@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Shawn Test invite	shawntestinvite@gmail.com	<input checked="" type="checkbox"/>	Pending
TestInvite	testinvite@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
Theodore Tarrance	ttarrance@catmkg-dev.onestreamtest.com	<input type="checkbox"/>	
shawn	shawn@catm.com	<input checked="" type="checkbox"/>	Pending

### User Information

**Name:** Theodore Tarrance  
**Description:** ttarrance@catmkg-dev.onestreamtest.com  
**Ext. Auth. Provider:** AzureSSO  
**Ext. UserName:** ttarrance@catmkg-dev.onestreamtest.com  
**Email:** shawn@catmkg-dev.onestreamtest.com  
**Is Enabled:** True  
**Culture Code:** en-US

[Reset Password](#) [Delete](#)

### User Login History

Application Name	Logon Type	Logon Time	Last Activity Time	Logoff Time
------------------	------------	------------	--------------------	-------------

### User Groups

Group Name	Group Description
------------	-------------------

## Create User



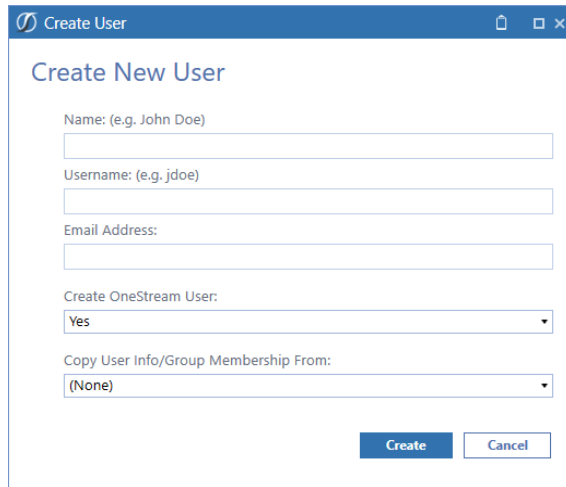
**Create User** adds new users to the Azure AD tenant and optionally to the OneStream Framework.

To create a user:

## User Management Console

---

1. On the **User Management Console** page, click **Create** and complete the following fields:



- **Name:** Enter the user's name.
  - **Username:** Enter the name used to log into Azure AD.
  - **Email Address:** Enter a valid email address.
  - **Create OneStream User:** Select **Yes** to add the user to the OneStream Framework database.
  - **Copy User Info/Group Membership From:** Select to copy an individual user's information or group information.
2. Click the **Create** button.
  3. Repeat the procedure for each user to add.
  4. Click close to exit the **Create User** dialog box.

**NOTE:** Copied security groups can allow access to multiple applications in the OneStream Framework environment, requiring additional security group adjustments in OneStream **System > Administration > Security**.

# Invite User



Invite

**Invite User** enables a system administrator to send an invitation to a user who has an existing Azure AD or Office 365 account not currently in the Azure AD tenant hosted by OneStreamCloud Services. After accepting the invitation, that existing account can access OneStream. This email also contains the company's OneStream environment URL.

## Send an Invitation

1. On the **User Management Console** page, click **Invite** and complete the following fields:

Invite User

Name: (e.g. John Doe)

Email Address:

Create OneStream User:

Copy User Info/Group Membership From:

Send Cancel

- **Name:** Enter the user's name.
  - **Email Address:** Enter a valid email address.
  - **Create OneStream User:** Select **Yes** to add the user to the OneStream Framework database.
  - **Copy User Info/Group Membership From:** Select to copy an individual user's information or group information from the security user information.
2. Click the **Send** button to send the invitation.

# Import Users



**Import Users** enables a system administrator to perform a bulk create or invite by importing a valid comma-separated values (.csv) file of user properties.

The bulk import process creates users but does not assign a default security group in OneStream. Additional security group maintenance in the OneStream **System > Administration > Security** tab is necessary to finalize the new user's access.

## Create Users Import Format

The format for **Create Users** is a 4-column, .csv file with the following fields:

- Name
- Username
- Email
- OneStream User

The OneStream User column determines if a user is added as a OneStream user or an Azure-only user.

- A **True** or **Yes** response designates them as a OneStream and Azure user.
- A **False** or **No** response designates them as an Azure-only user.

**IMPORTANT:** Do not add column headers to the .csv files. Headers will cause an import to fail.

## Example Create User

### OneStream and Azure User

```
Name,Username,Email,OneStream User
John Doe,jdoe,jdoe@mycompany.com,True
John Doe,jdoe,jdoe@mycompany.com,Yes
```

### Azure-only User

```
Name,Username,Email,OneStream User  
John Doe,jdoe,jdoe@mycompany.com,False  
John Doe,jdoe,jdoe@mycompany.com,No
```

### Invite Users Import Format

The format for Invite Users is a 3-column, .csv file with the following fields:

- Username
- Email
- OneStream User

The OneStream User column determines if a user is added as a OneStream user or an Azure-only user.

- A **True** or **Yes** response designates them as a OneStream and Azure user.
- A **False** or **No** response designates them as an Azure-only user.

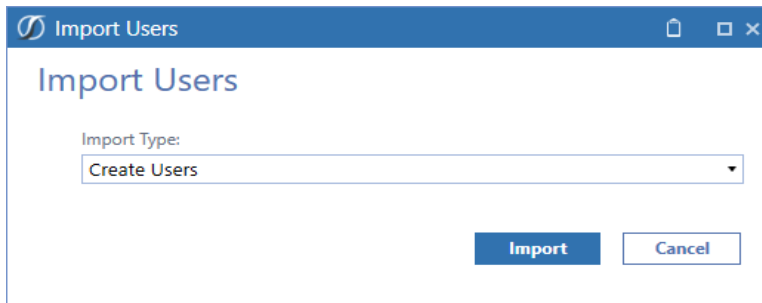
**IMPORTANT:** Do not add column headers to the .csv files. Headers will cause an import to fail.

### Example Invite User

```
Username,Email,OneStream User  
mdoe,mdoe@mycompany.com,True  
mdoe,mdoe@mycompany.com,Yes
```

### Import a Create/Invite User File

1. On the **User Management Console** page, click **Import**.
2. In the **Import Users** dialog box, use the **Import Type** drop-down list to select **Create Users** or **Invite Users**. Click the **Import** button.



3. Navigate to the location of the file and click **Open**. The Import Users process runs a data management job for the imported users. This job will run as a background task that can be monitored from the Task Activity screen.

### Delete User

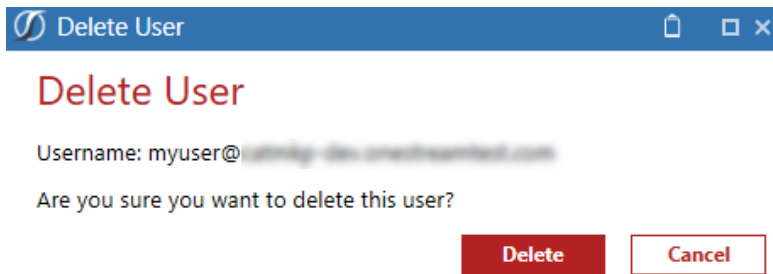
The **Delete** button enables a system administrator to remove a user from Azure AD and disable them in the OneStream security.

When a user is deleted from the system, their user information remains in OneStream to preserve the integrity of the audit trail, which contains the activity history associated with the user ID.

To delete a user:

1. On the **User Management Console** page, select the user.
2. Under **User Information**, click **Delete**.

3. In the **Delete User** dialog box, click the **Delete** button to confirm.



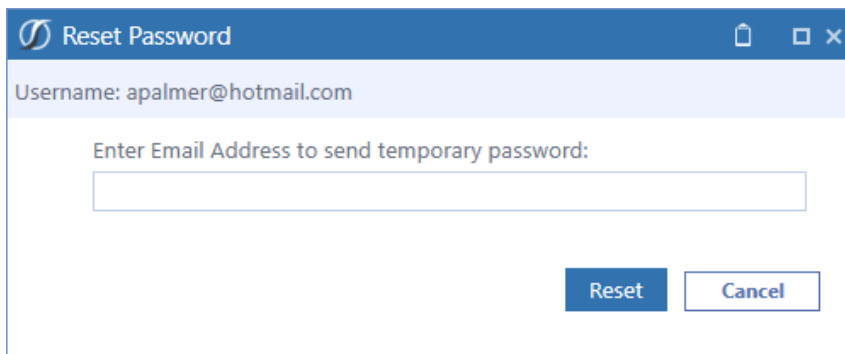


# Reset Password

System administrators can use the **Reset Password** button to initiate the password reset process for a user.

To reset a user's password:

1. On the **User Management Console** page, select the name of the user.
2. Under **User Information**, click **Reset Password**.
3. In the **Reset Password** dialog box, enter the user's email address.
4. Click the **Reset** button to send the temporary password.




Reset Password

Username: apalmer@hotmail.com

Enter Email Address to send temporary password:

Reset Cancel

# Refresh

 Click Refresh to update a page.

**Refresh User Details** updates the displayed information for changes in the security domain or the OneStream system security.

# Security



Security accesses the OneStream framework.

## User Management Console

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Security opens the **OneStream System > Administration > Security** page to manage the system security framework for OneStream users and groups.

# Application Management

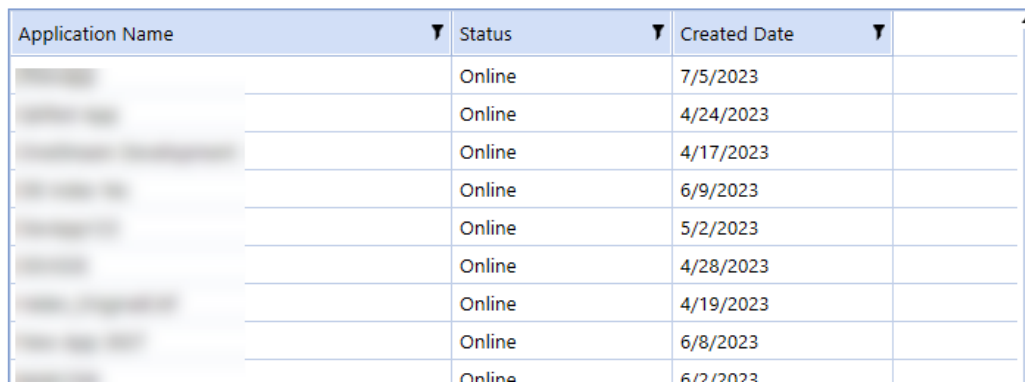
- **Application Management** enables you to create or replace applications as a copy of existing applications or remove applications within your OneStream Azure environment.

Administrators running platform version 6.x can use Application Management to copy, replace, and remove applications and view historical activity on applications.

When you launch Application Management, the **Application Console** displays all applications in grid view and includes the following information:

- **Application Name:** Title of the application.
- **Status:** Indicates if the application is online or deleted.
- **Created Date:** Indicates when the application was created.

## Application Console



Application Name	Status	Created Date	
[Blurred]	Online	7/5/2023	
[Blurred]	Online	4/24/2023	
[Blurred]	Online	4/17/2023	
[Blurred]	Online	6/9/2023	
[Blurred]	Online	5/2/2023	
[Blurred]	Online	4/28/2023	
[Blurred]	Online	4/19/2023	
[Blurred]	Online	6/8/2023	
[Blurred]	Online	6/2/2023	

## Application Details

Select an application to view the following application details:

### Application Information

## Application Management

---

- Environment
- Owner
- Creation Date

### Application History

- Action Taken
- User
- Start Time

#### Application Console

Application Name	Status	Created Date
	Online	7/5/2023
	Online	4/24/2023
	Online	4/17/2023
	Online	6/9/2023
	Online	5/2/2023
	Online	4/28/2023
	Online	4/19/2023
	Online	6/8/2023
	Online	6/2/2023
	Online	5/2/2023
	Online	5/2/2023
	Online	5/2/2023
	Online	5/30/2023
	Online	6/13/2023
	Online	4/10/2023
	Online	5/18/2023
	Online	5/23/2023
	Online	5/2/2023
	Online	6/8/2023
	Online	6/2/2023
	Online	5/10/2023
	Online	4/12/2023
	Online	4/11/2023
	Online	5/2/2023
	Online	5/2/2023
	Online	5/1/2023
	Online	6/13/2023
	Online	4/19/2023

#### Application Information

**Environment:** DEV1  
**Owner:** @onestreamsoftware.com  
**Creation Date:** 4/17/2023

#### Application History

Action Taken	User	Start Time
Copy		6/13/2023 8:51:47 PM
Copy		6/13/2023 6:37:57 PM
Copy		6/8/2023 2:51:51 PM
Copy		6/8/2023 2:27:21 PM

## Copy Application

Administrators can create or replace applications across environments using the **Copy Application** tab in the Application Management solution.

### Source

**1** Source

Source Environment

Source Application

1. Select a **Source Environment**, which is the environment of the application being copied or replaced. The Source Environment will display active OneStream environments.
2. Select a **Source Application**, which is the data that will be copied to create a new application or replace an existing application. The Source Application will display all active OneStream applications.

### Target

**2** Target

Target Environment

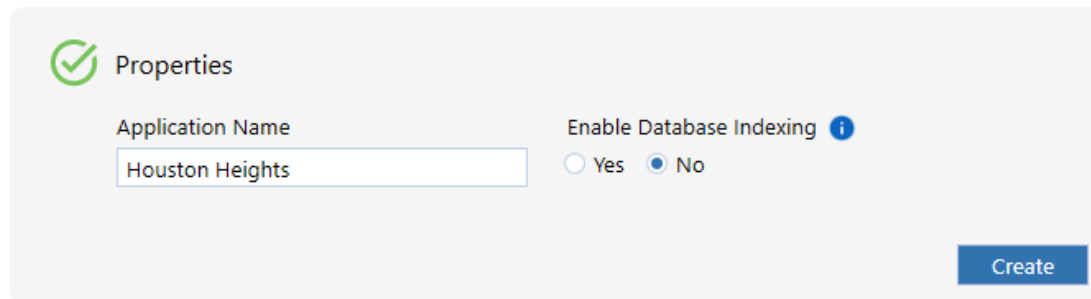
Target Application

1. Select a **Target Environment**, which is the environment where the source application data will be copied or replaced. Only the current environment can be selected from the drop-down list.
2. Select a **Target Application** to create a new application or replace an existing application. The drop-down list allows for a new application copy or displays all available applications that can be replaced.

**IMPORTANT:** Replacing the application removes all existing data and replaces it with a copy of the source application data.

### Properties

Use **Properties** to configure options on the application being created or replaced.



### Application Name

Type a unique application name in the **Application Name** field.

**NOTE:** Application names can be 4–128 characters in length and contain the following characters: period, space, underscore, alphanumeric characters, and hyphen.

### Enable Database Indexing

**Enable Database Indexing** rebuilds indexes during maintenance windows.

- Select **Yes** to enable.
- Select **No** to skip enabling.

**NOTE:** Due to increased maintenance times, it is recommended to enable database indexing on only one business critical application.

### Create or Replace Application

Depending on the selection made in the Target Application field, the button will display as **Create** or **Replace**.

#### Create

If a new application is being created, a **Create** button displays.

#### Replace

If an existing application was selected in the Target Application drop-down list, a **Replace** button displays.

### Create

✓ Properties

Application Name  
Houston Heights SQL

Enable Database Indexing ⓘ  
 Yes  No

Create

### Replace

✓ Properties

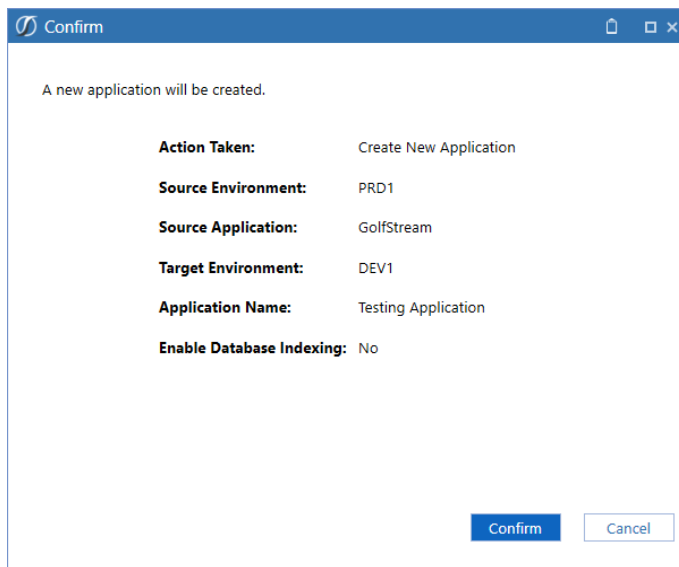
Application Name  
Houston Heights SQL

Enable Database Indexing ⓘ  
 Yes  No

Replace

## Confirm Summary

The **Confirm** dialog box appears after the create or replace action runs. The **Confirm** dialog box displays the actions that must be confirmed. This confirmation also displays any warnings, such as if a production application is being created.



Confirm

A new application will be created.

<b>Action Taken:</b>	Create New Application
<b>Source Environment:</b>	PRD1
<b>Source Application:</b>	GolfStream
<b>Target Environment:</b>	DEV1
<b>Application Name:</b>	Testing Application
<b>Enable Database Indexing:</b>	No

Confirm Cancel

1. Review the confirmation summary.
2. Click the **Confirm** button to accept the actions.

**NOTE:** If you choose to cancel or close the dialog box, you can make your corrections.

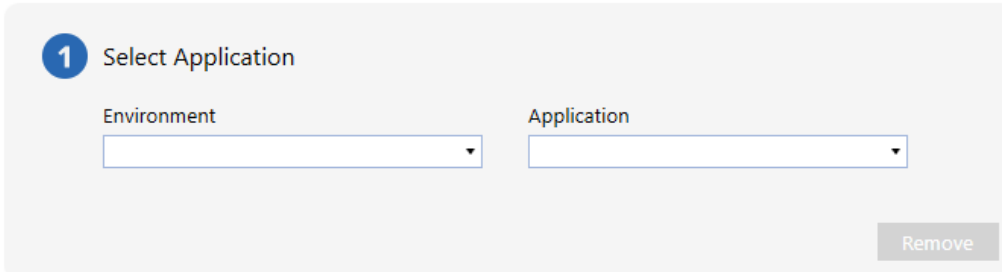
Once you confirm, the **Application History** page displays.

# Remove Application

Administrators can remove applications using the **Remove Application** tab in Application Management.

[Application Console](#) [Copy Application](#) [Remove Application](#) [Application History](#)

## Remove Application



1 Select Application

Environment

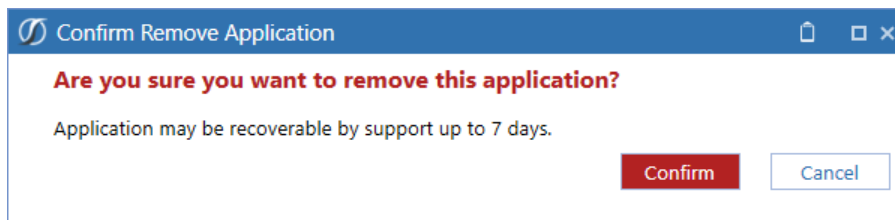
Application

Remove

1. Click **Remove Application**.
2. Select the **Environment**.
3. Select the **Application**.
4. Click the **Remove** button.

## Confirmation Summary

The **Confirm Remove Application** dialog box displays after the remove action runs. Click the **Confirm** button to accept the actions.




After you confirm, you will be taken to the **Application History** page.


**NOTE:** If you choose to cancel or close the dialog box, you can make corrections.



# Application History

The **Application History** page displays detailed information on the operations completed through Application Management. Click  to filter data in the table.

Application History

 Refresh

Status	Action Taken	Database Indexing	Source Environment	Source Application	Target Environment	New Application Name	Application Replaced	Start Time	End Time	User
Completed	Copy	No	DEV1	Development Development	DEV1	Old Test App	Replacement App (2023) Prod 1.0.0	6/13/2023 8:51:47 PM	6/13/2023 9:02:31 PM	Service Manager
Completed	Copy	No	DEV1	Development Development	DEV1	Old App		6/13/2023 6:37:57 PM	6/13/2023 6:46:14 PM	Service Manager
Completed	Remove		DEV1	Legacy				6/13/2023 6:25:22 PM	6/13/2023 6:28:09 PM	Service Manager
Completed	Remove		DEV1	Legacy				6/12/2023 1:41:24 PM	6/12/2023 1:44:03 PM	Service Manager

- **Status:** Shows the progression and results of all applications being created, replaced, or removed after the process starts. Application statuses include: **Running**, **Success**, or **Failed**.

**NOTE:** If the result is **Running**, click **Refresh** to see if the process has completed its action.

**NOTE:** If the result is **Failed**, navigate to the **Task Activity** dialog box to view a description of the error.

- **Action Taken:** Shows the action performed by the user. Displays **Copy** or **Remove** for all applications.
- **Enable Database Indexing:** Indicates whether the application will have indexes rebuilt during maintenance windows. Displays **Yes** or **No** for all applications.
- **Source Environment:** Displays the environment from which the Source Application is chosen.
- **Source Application:** Displays the data used to create a new application or to replace data in another application.
- **Target Environment:** Displays the environment where the new or replaced application was placed.
- **New Application Name:** Displays the name given to the created or replaced application.

## Application Management

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- **Application Replaced:** Displays the name of the replaced application. If a new application was created, this field is blank .
- **Start Time:** Indicates the start time of the copy, replace, or remove process.
- **End Time:** Indicates the end time of the copy, replace, or remove process.
- **User:** Indicates the user who created, replaced, or removed the application.

# Key Management



Key Management enables you to manage the OneStream Azure Key Vault and create keys, certificates, and secrets.

## Bring Your Own Key

Our SaaS offering includes a robust key management service, ensuring the highest level of security for your data. Each client's key vault is uniquely deployed within our cloud infrastructure, enabling the Bring Your Own Key (BYOK) feature as part of our Cloud Administration Tools suite. This design guarantees that the lifecycle of your key vault is intrinsically linked to your specific instance, maintaining exclusivity and preventing access by other tenants.

You retain complete control over your keys through the Cloud Administration Tools interface, with keys securely stored in your private key vault, which is associated with a managed identity. Access to the key vault is stringently regulated; only the managed identity assigned to your OneStream instance's compute nodes and database server has the operational capability to manage keys, secrets, and certificates. This managed identity is granted specific roles—Certificates Officer, Crypto Officer, Service Encryption User, and Secrets Officer—to facilitate secure operations.

Network security measures are rigorously enforced to ensure that the key vault is accessible solely from your OneStream instance's network. Complementing these measures, we employ Azure policies and proactive alerting systems to safeguard against unauthorized changes to access policies. These policies are consistently reviewed in alignment with our SOC controls, further reinforcing our commitment to your data's security.

### Bring Your Own Key

The screenshot displays the 'Bring Your Own Key' interface. At the top right, there is a red button labeled 'Disable BYOK'. Below this, the interface is divided into three main sections:

- Upload Key:** A form with a text input field labeled 'Enter .pfx file password' and a blue 'Upload' button.
- Table of Keys:** A table with columns for 'Thumbprint', 'Status', and 'Created Date'. The first row shows an 'Active' key created on 7/7/2023 at 2:09:56 PM. The following five rows show 'Disabled' keys created on 7/7/2023 at 2:09:28 PM, 7/3/2023 at 6:44:16 PM, 7/3/2023 at 5:27:10 PM, 7/3/2023 at 5:26:58 PM, and 7/3/2023 at 5:26:41 PM.
- Key Information:** A panel showing details for a selected key: 'Status: Active', 'Thumbprint: [redacted]', 'Activation Date: 1/1/1970 12:00:00 AM', and 'Expiration Date: 1/1/1970 12:00:00 AM'.

# Enable Key Management

To enable BYOK:

1. Click **Upload**.

2. Select a .pfx file.

**NOTE:** Users on Platform 8.0 or above can choose to upload .pem files.

3. Click **Open**.

4. Your key is uploaded directly to the Azure Key Vault and the uploaded file is automatically deleted.

# Key Information

Select a key to view its:

- Name
- Status
- Azure thumbprint ID
- Activation Date
- Expiration Date

# Disable Key Management

Disable key management by clicking the **Disable BYOK** button. BYOK will be disabled and your data will be managed by the service.

# Refresh



This refreshes information in the grid.

# Certificates (Available Only with Platform 8.0)

Certificates and their corresponding keys can be used for more secure authentication to APIs, FTP servers, and other integrations. Each certificate contains a thumbprint ID that can be used in the Azure configuration tiles to identify which key is in use. The certificate interface enables system administrators to securely store these for later use in business rules.

### Certificates

Refresh

[View Snippet](#) [Delete Certificate](#)

#### Upload Certificate

Certificate Name:

Key Type:  HSM  Non-HSM

Password:

[Upload](#) [Cancel](#)

Name	Status	Created Date	Expiration Date
	Active	7/10/2023 3:41:36 PM	5/16/2024 9:25:55 PM
	Active	7/7/2023 2:11:28 PM	5/16/2024 9:25:55 PM
	Active	7/6/2023 6:18:24 PM	5/16/2024 9:25:55 PM
	Active	6/27/2023 2:48:51 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 4:21:44 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 4:20:31 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 4:19:53 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 3:56:58 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 3:56:33 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 3:55:01 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 3:54:25 PM	5/16/2024 9:25:55 PM
	Active	6/26/2023 3:53:38 PM	5/16/2024 9:25:55 PM

#### Certificate Versions

Version	Status	Created Date	Expiration
<b>Current Version</b>			
9335a9b64a1846daa1fe1cfd75214b83	Active	6/27/2023 2:48:51 PM	5/16/2024 9:25:55 PM
<b>Previous Versions</b>			
Version	Status	Created Date	Expiration Date
	Active	6/27/2023 2:48:15 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:47:56 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:47:10 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:46:22 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:46:09 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:45:58 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:45:46 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:45:29 PM	5/16/2024 9:25:55 P
	Active	6/27/2023 2:45:16 PM	5/16/2024 9:25:55 P

## Upload Certificates

To create a new certificate:

1. Enter a certificate name.

**NOTE:** Certificate names should be 127 characters or less.

2. Under **Key Type**, select **HSM** or **Non-HSM**.

**NOTE:** HSM is a physical device providing extra protection for sensitive keys. Using an HSM will permanently prevent exporting the private key in the future.

3. Enter a password.

4. Click the **Upload** button.
5. Select a .pfx file.
6. Click **Open**.

## Certificate Versions

Select a certificate to view its status, creation and expiration dates, current version number, and previous versions.

## Refresh



This refreshes information in the grid.

## View Snippet

Click the **View Snippet** button to retrieve a sample BRAPI code of the certificate, which can be copied and used in your business rules.

Certificate X509Certificate2

```
BRApi.Utilities.GetCertificate(SessionInfo si, string certificateName)
```

This BRApi is used to access a certificate or key from within a business rule to load it into memory. It cannot be used with HSM backed keys.

Certificate Signature String

```
BRApi.Utilities.Sign(SessionInfo si, string keyName, string algorithm, byte[] digest)
```

This BRApi is used to generate a signature using a key stored in the key vault without extracting the key. This can be used with both HSM and non-HSM backed keys.

## Remove Certificates

The **Delete Certificate** button enables you to delete a certificate.

**NOTE:** After you delete a certificate, you cannot reuse the same certificate name for 90 days.

# Secrets (Available Only with Platform 8.0)

Secrets enable system administrators to securely store sensitive information like passwords, API keys, or connection strings for later use in business rules.

Secrets

The screenshot displays the 'Secrets' management interface. On the left, the 'Upload Secret' form includes a 'Refresh' button, a 'Name: \*' input field, a 'Secret value: \*' input field, and an 'Upload' button. Below the form is a list of existing secrets with columns for 'Name' and 'Created'. On the right, the 'Secret Versions' section shows the 'Current Version' and a table of 'Previous Versions' with columns for 'Version' and 'Created'.

Version	Created
	Created
	7/7/2023 2:13:12 PM
	7/6/2023 6:52:45 PM
	7/6/2023 5:51:36 PM
	6/14/2023 8:57:13 PM
	6/14/2023 8:56:52 PM
	6/14/2023 8:30:37 PM
	6/9/2023 12:51:35 PM
	6/9/2023 12:50:42 PM
	6/9/2023 12:49:58 PM

## Upload Secrets

To create a new secret:

1. Enter a secret name.

**NOTE:** After you delete the name of a secret, you cannot reuse the same name for 90 days.

2. Enter a secret value.
3. Click the **Upload** button.

## Secret Versions

Select a secret to view the current version number, previous version number, and creation dates.

### Refresh



This refreshes information in the grid.

### View Snippet

Click the **View Snippet** button to retrieve a sample BRAPI code of the secret, which can be copied and used in business rules.

Secret Value String


```
BRApi.Utilities.GetSecretValue(SessionInfo si, string secretName)
```

### Remove Secrets

Click the **Delete Secret** button to delete a secret that is no longer in use.



# Help and Miscellaneous Information

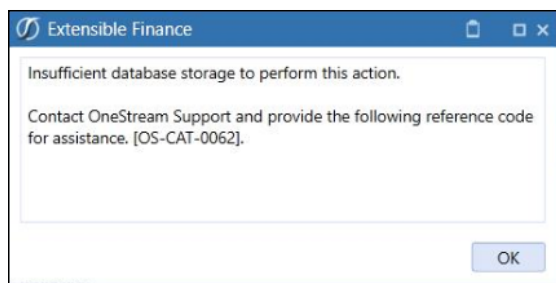
 This page contains solution documentation.

## Cloud Database Best Practices

Use the following best practices.

### Cloud Database Space

When managing applications, if the Azure capacity is insufficient to copy an entire application, the copy process stops and an error message displays. OneStream Support may be able to increase your available storage at an additional cost or you may free up space by using **Remove Application** in **Application Management** to delete applications that are no longer needed.



## 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.

## Package Contents and Naming Conventions

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

**Example Package Name:** CAT\_PV6.0.0\_SV100\_PackageContents.zip

Identifier	Description
CAT	Solution ID
PV6.0.0	Minimum Platform version required to run solution
SV102	Solution version
PackageContents	File name

## 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.

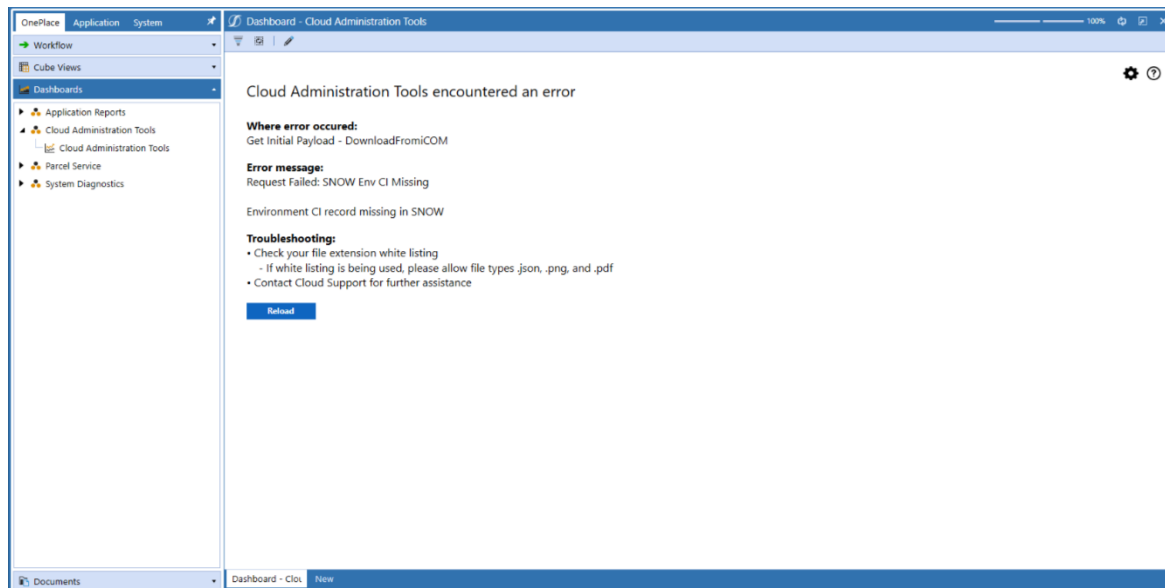
# Troubleshooting

## Dashboard Rendering Errors

When the Cloud Administration Tools encounters any dashboard rendering errors, a troubleshooting dashboard will be populated.

On this dashboard, users can see where the error occurred, a brief error message, and steps for troubleshooting the error.

**NOTE:** Errors will still be tracked in the error log.



**Reload:** Use this button to reload the dashboard, during which time the application will clear out unused discover dashboard .json files. If this resolves the issue, users will be redirected to the Cloud Administration Tools homepage, otherwise the troubleshooting dashboard will populate again. The reload button can be used to reassess the issue twice before the button is taken away and users are prompted to contact Cloud Support.