



Getting Started with Solutions Guide



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Overview

This guide provides instructions for solution administrators to install and configure the following OneStream Solutions:

- Admin Assist PV9.0.0 SV1.0.0 and later
- Administrator Solution Tools PV7.4.0 SV1.0.2 and later
- AI Data Tools PV9.3.0 SV1.2.0 and later
- Allocations Management PV8.4.0 SV1.0.0 and later
- Analytic Drill Down PV8.4.0 SV1.0.1 and later
- Application Control Manager PV9.1.0 SV1.0.0 and later
- BAI Parser PV8.0.0 SV1.0.5 and later
- Cloud Administration Tools PV8.5.0 SV1.0.0 and later
- Compliance PV6.2.0 SV1.0.3 and later
- ESG Reporting and Planning PV9.0.0 SV2.1.0 and later
- File Explorer Manager PV6.5.0 SV1.0.2 and later
- Financial Close PV9.0.0 SV2.0.3 and later
- Forecast Value Add PV9.3.0 SV1.1.0 and later
- Genesis PV9.0.0 GV2.0.0 and later
- Guided Reporting PV8.4.0 SV1.1.3 and later
- MarketPlace Solution Tools PV7.2.0 SV1.0.0 and later

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- Narrative Reporting PV9.1.0 SV1.0.0 and later
- Navigation Center PV9.1.0 SV1.0.0 and later
- Parcel Service PV8.5.0 SV1.0.0 and later
- Planning Solutions PV6.2.0 SV1.0.4 and later
- Predictive Analytics 123 PV6.2.0 SV1.0.3 and later
- SAP Connector PV8.4.0 SV1.1.0 and later
- Scenario Analysis 123 PV5.3.0 SV1.0.0 and later
- Security Audit Reports PV6.2.0 SV1.0.2 and later
- SensibleAI Forecast PV9.3.0 SV4.2.0 and later
- SensibleAI Studio PV9.3.0 SV1.3.0 and later
- Snippet Editor PV6.2.0 SV1.0.0 and later
- Standard Application Reports PV6.4.0 SV1.0.1 and later
- Standard System Reports PV4.3.0 SV1.0.2 and later
- System Diagnostics PV8.5.0 SV1.2.0 and later
- Table Data Manager PV6.2.0 SV1.0.3 and later
- Task Manager PV9.0.0 SV1.0.0 and later
- Xperiflow Administration Tools PV9.3.0 SV2.4.0 and later
- Xperiflow Cloud Tools PV9.0.0 SV2.3.0 and later

See [Install and Configure the Solution](#).

This guide also includes the recommended display settings, package file name conventions, recommendations for solution database migration, and considerations for modifications to solutions.

Overview

See the following sections:

- [Display Settings](#)
- [Package Contents and Naming Conventions](#)
- [Solution Database Migration Advice](#)
- [OneStream Solution Modification Considerations](#)

Follow the instructions in the solution guide to install and configure solutions that are not in this guide:

- Line Item Modeling
- Metadata Builder
- Power BI Connector
- Sample Templates

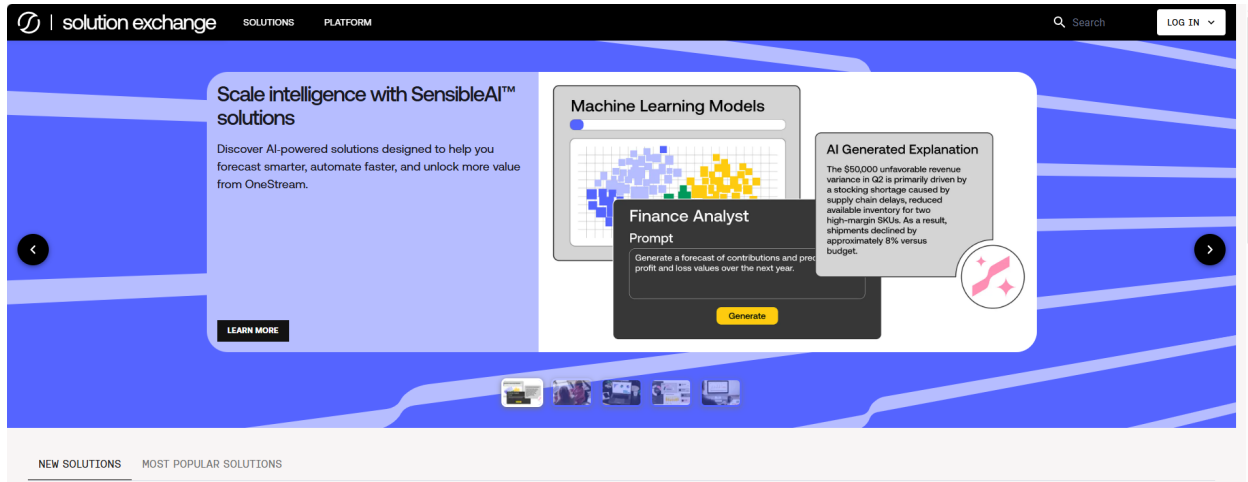
Go to documentation.onestream.com/docs/ and search for the solution guide. See [Help Documentation](#).

Solution Exchange

Use OneStream [Solution Exchange](#) to download, configure, and deploy solutions to extend the platform.

Solution administrators typically have access to Solution Exchange. Login is required.

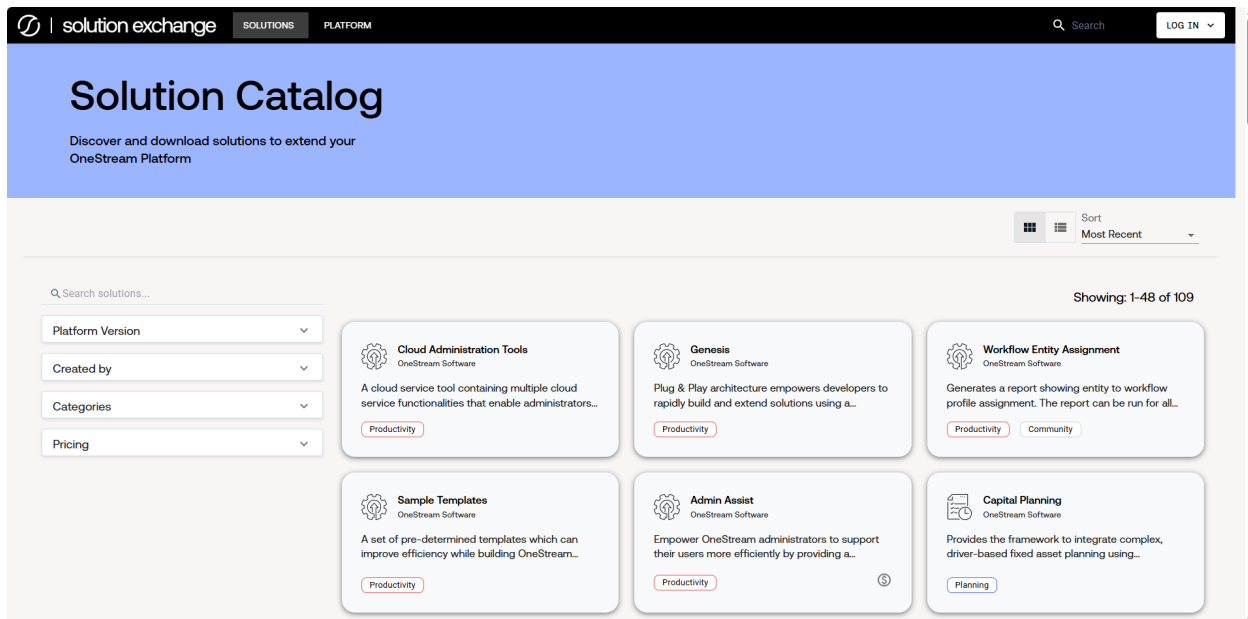
Overview




To go to the Solution Catalog page, follow these steps.


1. Hover your cursor over **SOLUTIONS**.
2. Select **All Solutions**.

You can browse the tiles, search for a solution, filter by platform version, creator, category, and pricing, and sort the items listed.

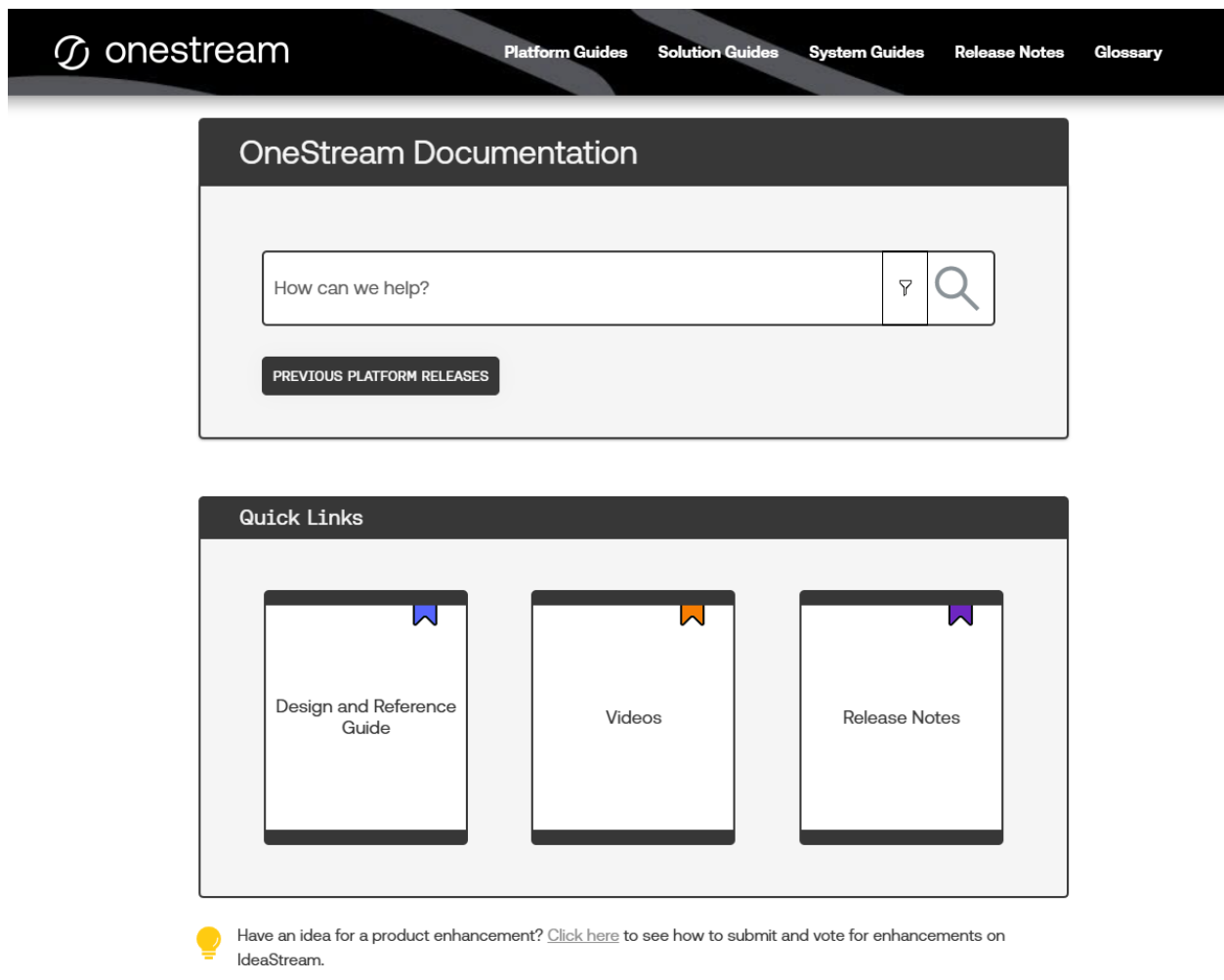


Help Documentation

To access the help documentation, in OneStream, select  or go to documentation.onestream.com/docs/

NOTE: If you select  in a solution or access the documentation from [Solution Exchange](#), you will go to the landing page for that solution.

All users have access to the help documentation. Login is not required.



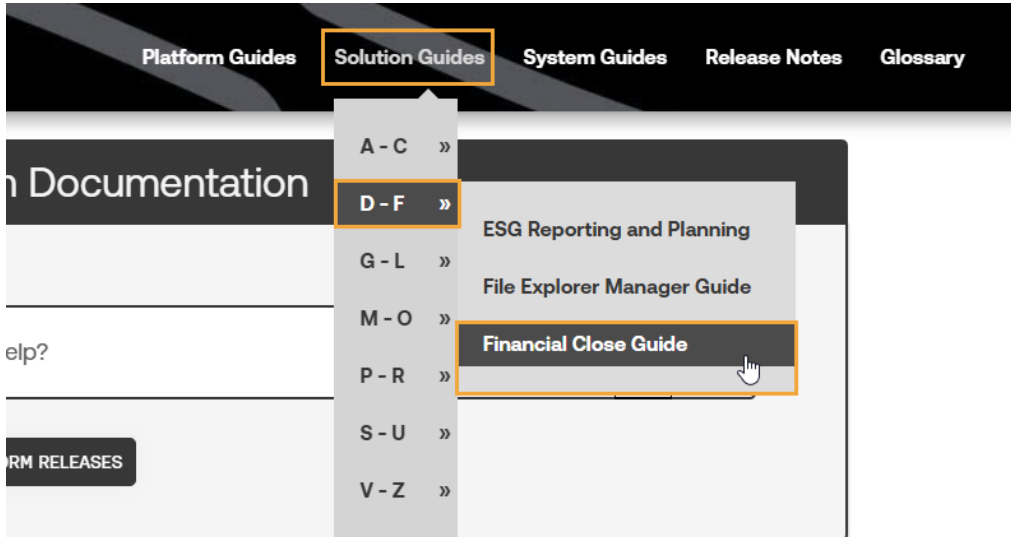
Solution Guides

After the solution is installed, see the solution guide for instructions for use. To find a solution guide, follow these steps:

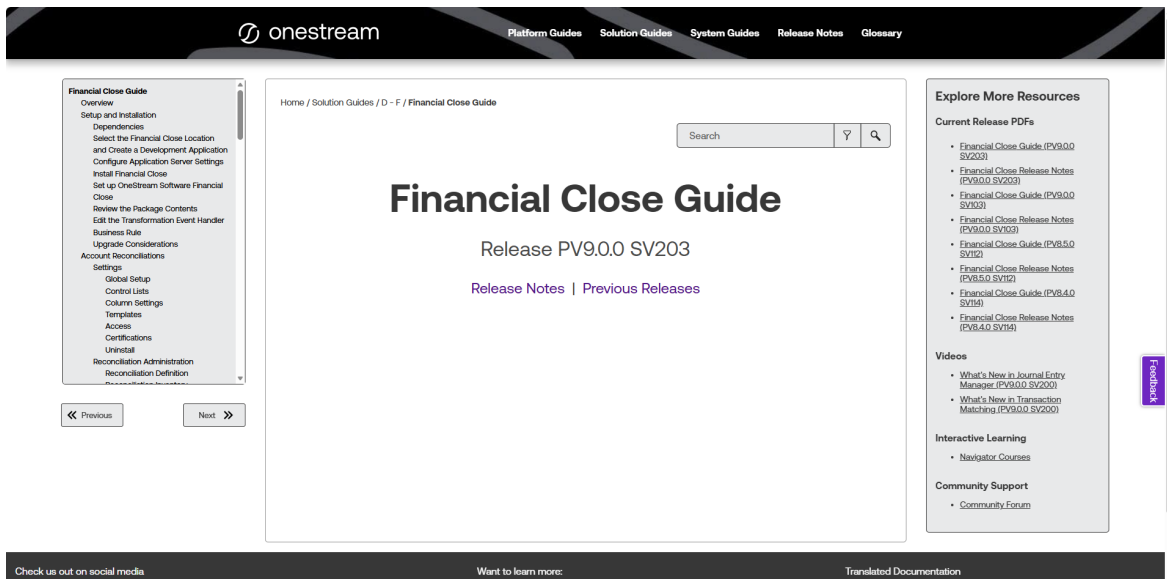
1. On the OneStream Documentation site, in the top navigation, hover your cursor over **Solution Guides**.
2. Hover your cursor over the alphabetical range for the first letter of the solution name.

Overview

3. Select the guide.



The table of contents and landing page for the guide display along with a panel to explore more resources, including PDFs of the current guide and release notes, videos, interactive learning, and community support.



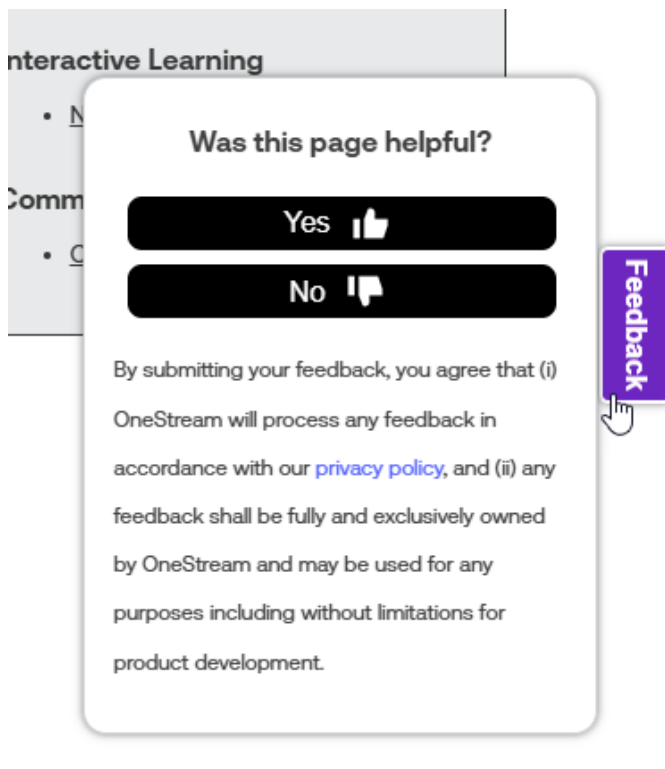
- (Optional) To access the guides and release notes from previous versions, select **Previous Releases**.

Financial Close Guide

Release PV9.0.0 SV203

Release Notes | **Previous Releases**

- (Optional) To give feedback on the documentation, select **Feedback**.

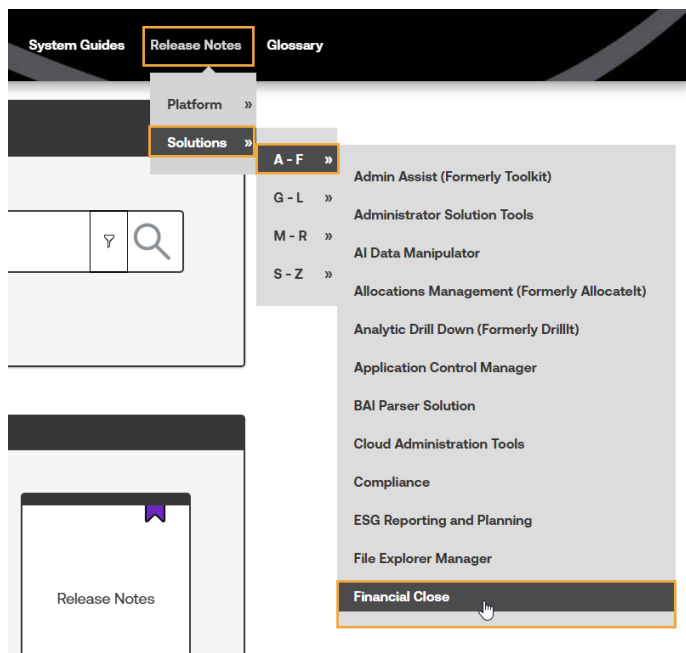


Solution Release Notes

Release notes include compatibility requirements, upgrade information, and release summaries.

To view the release notes, follow these steps:

1. On the OneStream Documentation site, in the top navigation, hover your cursor over **Release Notes**.
2. Hover your cursor over **Solutions**.
3. Hover your cursor over the alphabetical range for the first letter of the solution name.
4. Select the solution.



The table of contents and current release notes for the solution display along with a panel to explore more resources, including PDFs of the current guide and release notes, videos,

Overview

interactive learning, and community support.

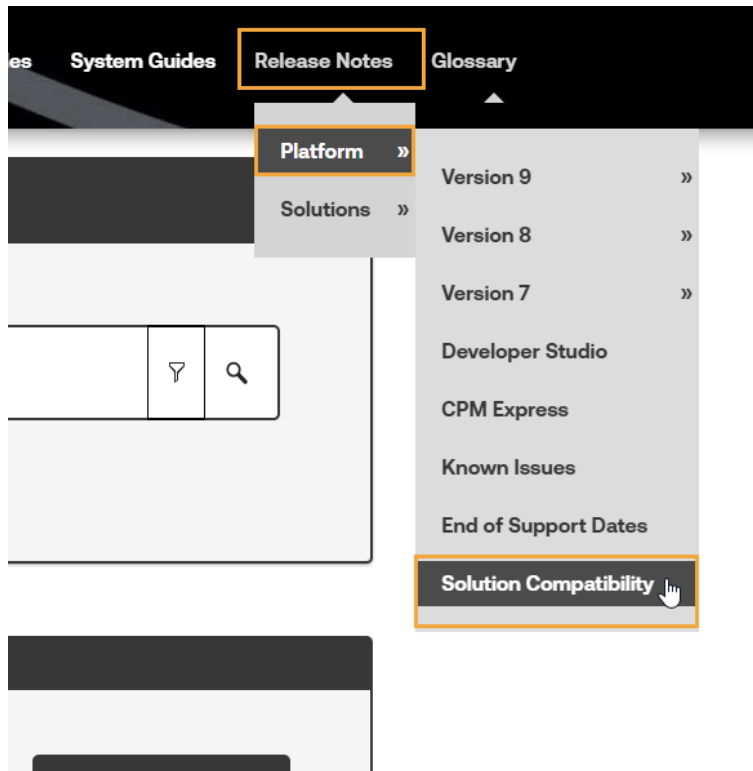
The screenshot displays the OneStream documentation interface for the 'Financial Close Release PV9.0.0 SV203'. The top navigation bar includes 'Platform Guides', 'Solution Guides', 'System Guides', 'Release Notes', and 'Glossary'. The main content area is titled 'Financial Close Release PV9.0.0 SV203' and provides details about a Hotfix release, including highlights, fixed issues, and upgrade information. A left sidebar offers a hierarchical menu of topics, and a right sidebar provides additional resources like PDFs, videos, and community support. A search bar is located at the top right of the main content area.

Solution Compatibility

The Solution Compatibility table includes solution versions and the compatible platform versions.

To view the Solution Compatibility table, follow these steps:

1. On the OneStream Documentation site, in the top navigation, hover your cursor over **Release Notes**.
2. Hover your cursor over **Platform**.
3. Select **Solution Compatibility**.



The solution versions and compatible platform versions display along with solutions designated for community status and solutions designated for sunset.

Overview

onestream
Platform Guides Solution Guides System Guides Release Notes Glossary

Solution Compatibility

Home / Release Notes / Platform / Solution Compatibility

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Solution Compatibility

This section lists solution compatibility with platform versions.
In the following table, find the row for your solution. Compatible platform versions are shaded green.

Solution			Platform Version										Notes
Code	Name	Version	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
ACM	Application Control Manager	PV8.5.0 SV1.1.1	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3	a	
ACM	Application Control Manager	PV9.1.0 SV1.0.0	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
ADD	Analytic Drill Down	PV8.4.0 SV1.0.1	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
ALL	Allocations Management	PV8.4.0 SV1.0.0	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
AST	Administrator Solution Tools	PV7.4.0 SV1.0.2	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
BAI	BAI Parser Solution	PV8.0.0 SV1.0.5	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
CAT	Cloud Administration Tools	PV8.0.0 SV1.0.2	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
CPP	Capital Planning	PV6.2.0 SV1.0.2	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
CSP	Cash Planning	PV6.2.0 SV1.0.2	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		
ESG	ESG Reporting and Planning	PV9.0.0 SV2.0.0	8.0	8.1	8.2	8.4	8.5	9.0	9.1	9.2	9.3		

Explore More Resources

- [Community Support](#)
- [Knowledge Base](#)
- [Community Forum](#)

Feedback

Install and Configure the Solution

Before you install the solution, review the compatibility requirements in the release notes on the OneStream documentation website: documentation.onestream.com/docs/

TIP: Release notes also include relevant upgrade information. Review this information before upgrading from a previous version.

View the compatibility with platform versions in Solution Compatibility. See [Solution Compatibility](#).

NOTE: OneStream recommends upgrading to the latest platform version.

See [Help Documentation](#).

Follow these steps to install and configure the solution.

1. [Select the Solution Development Location](#).
2. [Create the OneStream Development Application](#).
3. [Configure Security Settings](#).

NOTE: This only needs to be done once, and it applies to all solutions in the application.

4. [Install the Solution](#).
5. [Set Up the Solution](#).
6. [Configure Solution Settings](#).

Select the Solution Development Location

Decide whether to build the solution in a separate development OneStream application or directly in the production OneStream application.

- **Development OneStream Application:** As a best practice, use the development OneStream application to build the solution.
- **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, so it is not advised.

IMPORTANT: OneStream strongly recommends that you implement the solution in the development environment with a fresh copy of the production application before starting work.

TIP: Use Cloud Administration Tools to create a copy of the production application. See "Copy Application" in the *Cloud Administration Tools Guide*.

See [Solution Database Migration Advice](#).

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to the solution (for example, security groups, linked dashboards, Workflow Profiles, 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 solution.

NOTE: Use Cloud Administration Tools to create a copy. See "Copy Application" in the *Cloud Administration Tools Guide*.

3. Temporarily increase the Database Command Timeout settings for the installation. Set the **Command Timeout** and **Command Timeout Large** settings to **3600**. You can revert these values after the installation is complete.
 - For OneStream-hosted environments, follow these steps to access the settings:
 - a. Go to **System > Administration > System Configuration > Application Server Configuration > Database Server Connections > OneStream Database Server**.

NOTE: To access System Configuration, you must have group-based access to the SystemConfigurationPage security role in System > Administration > Security > System Security Roles > System User Interface Roles.

- b. On the **Configuration** tab, in the **Timeouts** section, the options are listed.

Install and Configure the Solution

- c. For both the **Command Timeout** and **Command Timeout Large** options, deselect the checkbox and then enter **3600**.
- For self-hosted environments, follow these steps to access the settings:
 - a. Start the OneStream Server Configuration Utility as an administrator.
 - b. Select **File > Open Application Server Configuration File**.
 - c. Under **Databases**, select the ellipsis next to **Database Server Connections**.
 - d. Select **OneStream Database Server**.
 - e. Under **Connection String Settings**, the options are listed.
4. Reset IIS. This will cancel all running jobs. You can go to Cloud Administration Tools and select the **RESET IIS** button, or you can log a catalog request to reset services for an individual environment.

See "Home" in the *Cloud Administration Tools Guide*.

TIP: Schedule an outage to reset IIS because it will take time to reset.

Configure Security Settings

Configure the security settings to enable users to create and change data in the additional database tables. Ancillary tables are custom or supplemental tables that support additional business requirements, custom solutions, or Solution Exchange applications.

This configuration only needs to be done once, and it applies to all solutions in the application.

IMPORTANT: Ensure these group settings include the users who will be working on and setting up the solution tables. Group settings are applicable to all solutions, so use generic group names.

See "OneStream Database Server Security and SQL Table Access" and "SQL Table Editor" in the *Design and Reference Guide*.

Platform Version 8.0.0 or Later

If you are using Platform Version 8.0.0 or later, follow these steps.

1. Go to **System > Administration > System Configuration > Application Server Configuration > Database Server Connections > OneStream Database Server**.

NOTE: To access System Configuration, you must have group-based access to the SystemConfigurationPage security role in System > Administration > Security > System Security Roles > System User Interface Roles.

2. On the **Configuration** tab, in the **Security** section, edit the following options:
 - **Can Create Ancillary Tables:** In the drop-down menu, select **True**.
 - **Can Edit Ancillary Table Data:** In the drop-down menu, select **True**.
 - **Access Group For Ancillary Tables:** Select the group that will view the content of tables.
 - **Maintenance Group For Ancillary Tables:** Select the group that will edit and maintain tables.
 - **Table Creation Group For Ancillary Tables:** Select the group to create tables.

NOTE: As of Platform Version 9.2.0, members of the Administrator group no longer have default permission to create, edit, access, and maintain ancillary tables. Users must be explicitly assigned.

Install and Configure the Solution

3. Reset IIS. This will cancel all running jobs. You can go to Cloud Administration Tools and select the **RESET IIS** button, or you can log a catalog request to reset services for an individual environment.

See "Home" in the *Cloud Administration Tools Guide*.

TIP: Schedule an outage to reset IIS because it will take time to reset.

Platform Version 7.4.4 or Earlier

If you are using Platform Version 7.4.4 or earlier, follow these steps.

1. Start the OneStream Server Configuration Utility as an administrator.
2. Select **File > Open Application Server Configuration File**.
3. Under **Databases**, select the ellipsis next to **Database Server Connections**.
4. Select **OneStream Database Server**.
5. Edit the following options:
 - **Access Group for Ancillary Tables:** Select a group that includes those who will access records.
 - **Can Create Ancillary Tables:** Select **True**.
 - **Can Edit Ancillary Table Data:** Select **True**.
 - **Maintenance Group for Ancillary Tables:** Select the group that will edit and maintain tables.
 - **Table Creation Group for Ancillary Tables:** Select the group to create tables.

Install and Configure the Solution

6. Reset IIS. This will cancel all running jobs. You can go to Cloud Administration Tools and select the **RESET IIS** button, or you can log a catalog request to reset services for an individual environment.

See "Home" in the *Cloud Administration Tools Guide*.

TIP: Schedule an outage to reset IIS because it will take time to reset.

Install the Solution

Follow these steps to install the solution.

NOTE: Some solutions must be purchased before installation.

1. Go to OneStream [Solution Exchange](#) and find the solution to install. See [Solution Exchange](#).
2. From the drop-down menus, select the appropriate platform version and solution version.
3. Select the **DOWNLOAD SOLUTION** button.

IMPORTANT: The package file name contains multiple identifiers that correspond with the platform. To preserve the integrity of the naming conventions, do not rename any of the elements. See [Package Contents and Naming Conventions](#).

4. Log in to OneStream.
5. On the **Application** tab, go to **Tools > Load/Extract**.
6. On the **Load** tab, use the **Select File** buttons to locate the solution package.

IMPORTANT: Do not extract the solution package from the .zip file.

Install and Configure the Solution

7. Select the **Open** button.
8. When the solution file name displays, select the **Load** button.
9. Select the **Close** button to complete the installation.

For the following solutions, instead of downloading from Solution Exchange, contact your OneStream representative to receive a link to download the solution:

- AI Data Tools
- AI System Diagnostics
- SensibleAI Forecast
- SensibleAI Studio
- Xperiflow Administration Tools
- Xperiflow Cloud Tools

Set Up the Solution

The first time the solution is run, you are guided through the process to set up the solution.

1. In OneStream, go to **OnePlace > Dashboards > <Solution Name> > <Solution Name>**.
2. Follow the prompts to set up tables and launch the solution.

NOTE: To set up tables, you must have group-based access to the Table Creation Group for Ancillary Tables security role. See [Configure Security Settings](#).

The following solutions do not require additional setup. After loading the solution package, installation is complete.

Install and Configure the Solution

- Admin Assist
- Genesis
- Xperiflow Cloud Tools

Configure Solution Settings

After installing the solution, configure the settings that relate to the functionality of the solution. The following table includes each solution and references to the documentation for configuration information. Follow the instructions in the referenced sections to configure additional settings as needed.

For compatibility requirements, see [Solution Release Notes](#).

Solution	Documentation
Admin Assist	See the following sections in the <i>Admin Assist Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings and Configuration"
Administrator Solution Tools	See the following sections in the <i>Administrator Solution Tools Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Business Rules"• "Settings"
AI Data Tools	See "Settings" in the <i>AI Data Tools Guide</i> .

Install and Configure the Solution

Solution	Documentation
Allocations Management	<p>See the following sections in the <i>Allocations Management Guide</i>:</p> <ul style="list-style-type: none">• "Package Contents"• "Business Rules"• "Data Structures"• "Solution Administration"
Analytic Drill Down	<p>See the following sections in the <i>Analytic Drill Down (Formerly DrillIt) Guide</i>:</p> <ul style="list-style-type: none">• "Package Contents"• "Settings and Configuration"
Application Control Manager	<p>See the following sections in the <i>Application Control Manager Guide</i>:</p> <ul style="list-style-type: none">• "Package Contents"• "Settings"• "Administration"

Install and Configure the Solution

Solution	Documentation
BAI Parser	See the following sections in the <i>BAI Parser Solution Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "BAI Dashboard Configuration"• "Administration Management"
Cloud Administration Tools	See the following sections in the <i>Cloud Administration Tools Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"• "Application Management"• "Cloud Database Best Practices"
Compliance	See the following sections in the <i>Compliance Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"

Install and Configure the Solution

Solution	Documentation
ESG Reporting and Planning	<p>See the following sections in the <i>ESG Reporting and Planning Guide</i>:</p> <ul style="list-style-type: none">• "Package Contents"• "Settings"• "Administration"• "Appendix C: Tables and Package Contents"
File Explorer Manager	<p>See the following sections in the <i>File Explorer Manager Guide</i>:</p> <ul style="list-style-type: none">• "Server Settings"• "Package Contents"• "Settings"

Install and Configure the Solution

Solution	Documentation
Financial Close	See the following sections in the <i>Financial Close Guide</i> : <ul style="list-style-type: none">• "Turning Off Dashboards"• "Review the Package Contents"• "Edit the Transformation Event Handler Business Rule"• "Settings" (Account Reconciliations)• "Settings" (Transaction Matching)• "Custom Service Factory" (Transaction Matching)• "Settings" (Journal Entry Manager)• "Templates" (Journal Entry Manager)• "ERPs" (Journal Entry Manager)
Forecast Value Add	See "Settings" in the <i>Forecast Value Add Guide</i> .
Genesis	See the following sections in the <i>Genesis Guide</i> . <ul style="list-style-type: none">• "Import Content Blocks"• "Settings"
Guided Reporting	See the following sections in the <i>Guided Reporting Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"

Install and Configure the Solution

Solution	Documentation
MarketPlace Solution Tools	See the following sections in the <i>MarketPlace Solution Tools Guide</i> : <ul style="list-style-type: none">• "Database Server Connections Settings"• "Package Contents"• "MarketPlace Solution Tools Settings"
Narrative Reporting	See the following sections in the <i>Narrative Reporting Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"
Navigation Center	See the following sections in the <i>Navigation Center Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"
Parcel Service	See the following sections in the <i>Parcel Service Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Data Management"• "Specify Settings"

Install and Configure the Solution

Solution	Documentation
Planning Solutions	See the following sections in the <i>Planning Solutions Guide</i> : <ul style="list-style-type: none">• "Review the Package Contents"• "Settings"
Predictive Analytics 123	See the following sections in the <i>Predictive Analytics 123 Guide</i> : <ul style="list-style-type: none">• "Dashboard Maintenance Unit"• "Business Rules"• "Settings"
SAP Connector	See the following sections in the <i>SAP Connector Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"
Scenario Analysis 123	See the following sections in the <i>Scenario Analysis 123 Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"
Security Audit Reports	See the following sections in the <i>Security Audit Reports Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Business Rules"• "Settings"

Install and Configure the Solution

Solution	Documentation
SensibleAI Forecast	See "Settings" in the <i>SensibleAI Forecast Guide</i> .
SensibleAI Studio	See "Settings" in the <i>SensibleAI Studio Guide</i> .
Snippet Editor	See the following sections in the <i>Snippet Editor Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"• "Extract and Reload Table Data"
Standard Application Reports	See the following sections in the <i>Standard Application Reports Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"
Standard System Reports	See the following sections in the <i>Standard System Reports Guide</i> : <ul style="list-style-type: none">• "How to Manually Remove Previous Versions"• "Package Contents"

Install and Configure the Solution

Solution	Documentation
System Diagnostics	See the following sections in the <i>System Diagnostics Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Business Rules"• "Data Management"• "Settings"• "Global Settings" (AI System Diagnostics)
Table Data Manager	See "Settings" in the <i>Table Data Manager Guide</i> .
Task Manager	See the following sections in the <i>Task Manager Guide</i> : <ul style="list-style-type: none">• "Package Contents"• "Settings"
Xperiflow Administration Tools	See the following sections in the <i>Xperiflow Administration Tools Guide</i> : <ul style="list-style-type: none">• "Set Up Xperiflow Administration Tools"• "Xperiflow Set Up (Required)"• "Solution Access"• "Settings"

Install and Configure the Solution

Solution	Documentation
Xperiflow Cloud Tools	<p>See the following sections in the <i>Xperiflow Cloud Tools Guide</i>:</p> <ul style="list-style-type: none">• "Set Up Xperiflow Cloud Tools"• "Settings"

Display Settings

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

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

Package Contents and Naming Conventions

The package file name contains multiple identifiers that correspond with the platform. To preserve the integrity of the naming conventions, do not rename any of the elements.

Most solutions follow the standard format, but there are exceptions for the following solutions:

- [Genesis](#)
- [Forecast Value Add and SensibleAI Studio](#)

Standard Format

The standard naming convention follows this format: XXX_PV###_SV###_PackageContents.zip

Example: OFC_PV9.0.0_SV2.0.1_PackageContents.zip

Identifier	Description
XXX	Solution ID NOTE: Some solutions, for example, Standard Application Reports and Standard System Reports, have longer solution IDs.

Package Contents and Naming Conventions

Identifier	Description
PV#.#.#	Minimum platform version required OneStream recommends upgrading to the latest platform version.
SV#.#.#	Solution version
PackageContents	File name

NOTE: The platform and solution version numbers correspond to Major, Minor, and Hotfix releases. Major releases update the first number, for example, 1.0.0 or 2.0.0. Minor releases update the second number, for example, 1.1.0 or 1.2.0. Hotfix releases update the third number, for example, 1.0.1 or 1.0.2.

Exceptions

See the following sections for exceptions to the standard naming convention format.

Genesis

The Genesis naming convention follows this format: XXX_PV#.#.#_GV#.#.#_

PackageContents.zip

Example: GEN_PV9.0.0_GV2.0.0_PackageContents.zip

GV#.#.# is the identifier for the Genesis version.

Forecast Value Add and SensibleAI Studio

The Forecast Value Add and SensibleAI Studio naming convention follows this format: XXX_SV###_XPFv###_PV###_PackageContents.zip

Example: FVA_SV1.0.0_XPFv4.1.0_PV9.1.0_
PackageContents.zip

Example: STU_SV1.2.0_XPFv4.1.0_PV9.1.0_
PackageContents.zip

XPFv### is the identifier for the Xperiflow version.

Solution Database Migration Advice

A development OneStream application is the safest method for building out a solution with custom tables. 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. Before the solution configuration, the development application should be a recent copy of the production application. This will ensure the identifiers match within the development and production applications. After the development application is created, install the solution and begin design.

NOTE: Use Cloud Administration Tools to create a copy. See "Copy Application" in the *Cloud Administration Tools Guide*.

See "Managing a OneStream Environment" in the *Design and Reference Guide*.

See [Select the Solution Development Location](#).

OneStream Solution Modification Considerations

Review these cautions and considerations regarding the modification of OneStream Solutions:

- Major changes to business rules or custom tables within a OneStream Solution are not supported because the modified solution will be significantly different from the original solution.
- If changes are made to any dashboard object, business rule, or Workspace assembly, consider renaming it or copying it to a new object first. This is important because if the solution is upgraded in the future, it will overlay and wipe out the changes. This also applies when updating the standard reports and dashboards provided in the solution.
- If modifications are made to a OneStream Solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes, such as changing a logo or colors on a dashboard, do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.