Application Control Manager Guide

PV 630 SV 101

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Solution Overview

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

With Application Control Manager, you can:

- Read and detect metadata changes in GL/ERP, data warehouses, and 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.
- Utilize multi-level approval workflow for change requests.
- Create audit reports on application change requests
- Manage metadata changes across environments (Dev-Test-Prod).
- Export metadata changes back to source systems.

Setup & Installation

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

See also: MarketPlace Solution Modification Considerations

Dependencies

Component	Description
OneStream 6.3.0 or later	Minimum OneStream Platform version required to install this version of Application Control Manager.

Select the Application Control Manager Development Location

Before beginning installation, decide whether to build Application Control Manager 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 Application Control Manager 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 that is being used in a Production capacity and this is seldom advised.

> **Note:** It is strongly recommended that you implement Application Control Manager in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream Application: As a Best Practice, use the Development OneStream application to build Application Control Manager.

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. Copy your Production OneStream application to your Development environment and rename it. This Development version will be used for your Application Control Manager project.

Application Server Settings

You may need to edit the OneStream application Server Configuration so users can create and change data in the additional database tables used by Application Control Manager. If other MarketPlace Solutions (such as Specialty Planning) are already in the application, these adjustments may already exist.

See also: Solution Database Migration Advice

Configure the OneStream Application Server

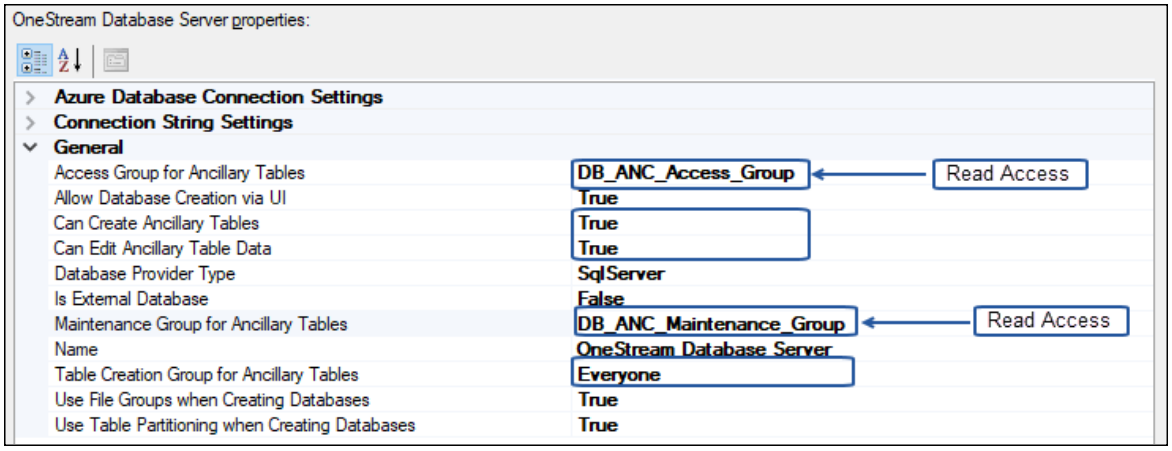
Be sure that the security group settings include the users who will be working on and setting up Application Control Manager before proceeding.

> **Note:** Group settings are applicable to all MarketPlace solutions; it is important to keep the group names generic.

1. Start the OneStream Server Configuration Utility as an Administrator.
2. Select **Open Application Server Configuration File** > **Database**
3. Edit the following **OneStream Database Server properties**:

- **Access Group for Ancillary Tables**: Select a group that includes those who will access records.
- **Can Create Ancillary Tables**: True
- **Can Edit Ancillary Table Data**: True

- **Maintenance Group for Ancillary Tables**: Select a group who will edit and maintain tables.
- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.



4. Restart Internet Information Server.

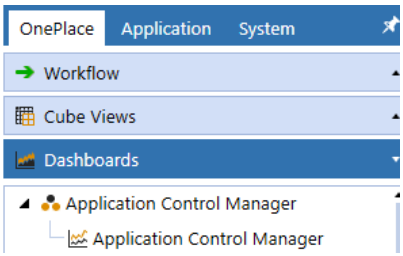
Install Application Control Manager

1. On the OneStream MarketPlace Dashboard, click **MarketPlace** > **Application Control Manager**.
2. On the Application Control Manager Solution page, select the appropriate 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's file name appears, click **Load**.
8. Click **Close** to complete the installation.

Set Up Application Control Manager

The first time you run Application Control Manager, you are guided through the table setup process.

In OneStream, click **OnePlace** > **Dashboards** > **Application Control Manager** > **Application Control Manager**.



Create Tables

1. Click **Step 1: Setup Tables**
   This step may be necessary when upgrading even if tables are already present. Application Control Manager will not drop any tables that already exist but will modify table structures and add any new ones if necessary.

2. When setup is complete, click **Step 2: Launch Solution** to open Application Control Manager.

Package Contents

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

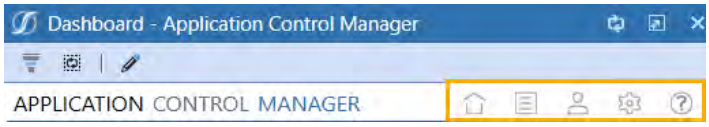
- ACM_ImportMetadata
- ACM_AccountSource
- ACM_EntitySource
- ACM_MetadataSource
- ACM_UD1-8Source
- ACM_DataSet

- ACM_Reports
- ACM_Engine
- ACM_Validations
- ACM_Param
- ACM_CreateFlowViews
- ACM_CreateRequest
- ACM_MetadataCommit
- ACM_MetadataImport
- ACM_PrepareMetadata

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.

Application Control Manager Dashboard

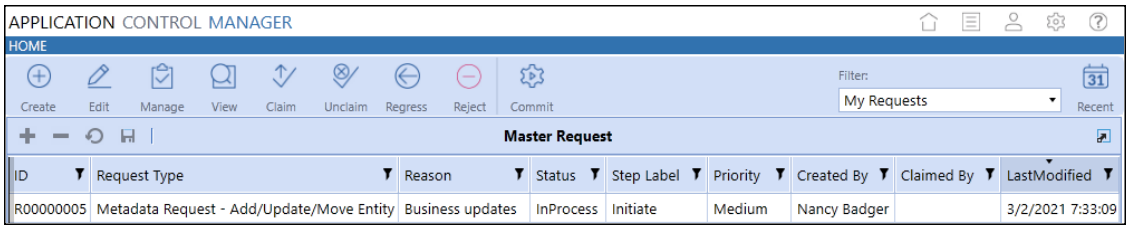
In the Application Control Manager dashboard, use the toolbar buttons to navigate to different pages.



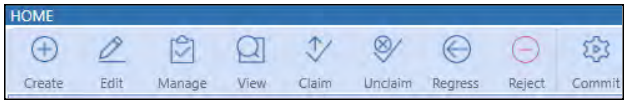
- **Home**: Create, edit, manage, claim, push back, reject, and commit requests
- **Reports**: Run reports on requests
- **Administration** (Admin Only): Define and create request views, flows, dimensions, properties, and validations
- **Settings** (Admin Only): Global settings for the solution. Most settings are configured once during the initial install and don't need to be updated on an ongoing basis.
- **Help**: View the documentation

Home

The Home page is the entry point for the solution.

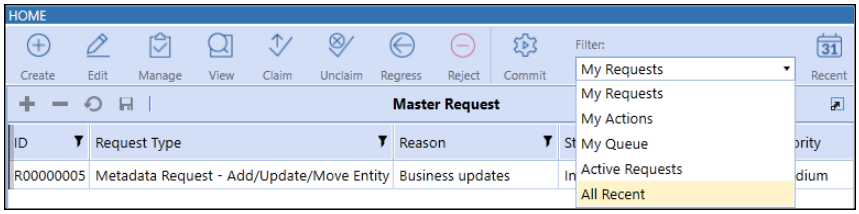


Home Toolbar



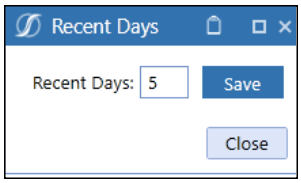
- **Create**: Create a new request
- **Edit**: Update an existing request
- **Manage**: Redirect to Manage Request to add/update items
- **View**: View an existing request in read-only mode. Request Workflow and Save buttons are not displayed so the request cannot be edited.
- **Claim**: Claims the request so the current user can work on it. Removes this request from the queue of other users.
- **Unclaim**: Puts the request back into the queue as Unclaimed for other users to claim.
- **Regress**: Pushes the request back to a prior step. (Admin Only)
- **Reject**: Rejects and close the request.
- **Remove**: Sets the status of the selected request to Closed
- **Commit**: Manually launches the Commit Data Management sequence to commit all requests currently at the Commit step with a status of Waiting.

Request Filter Bar

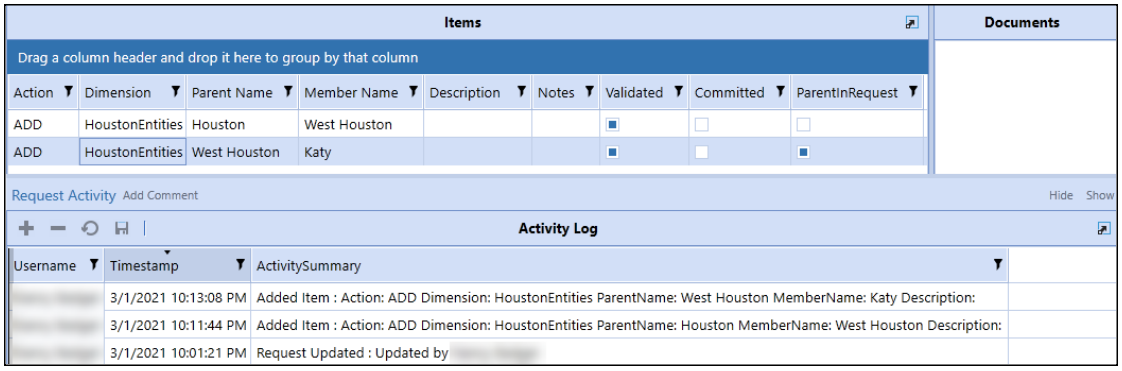


- **My Requests**: Shows requests the current user has created
- **My Actions**: Shows requests where the current user has an action to take

- **My Queue**: Shows requests where the current user is in the group that has the next action to take (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 the last XX days as configured in the next option
- : Configures how many days to view in the All Recent filter.



Request Detail



- **Items Table**: Shows summary information of the items created on the selected request
- **Documents**: View documents attached to the selected request
- **Request Activity**: View the activity log for the selected request and add comments to it

Manage Request

On the Manage Request page, you can:

- Move a request forward or backward in the request flow.
- Reject a request.
- Validate items in a request.
- Create or delete request items.
- Attach, delete, and download documents.

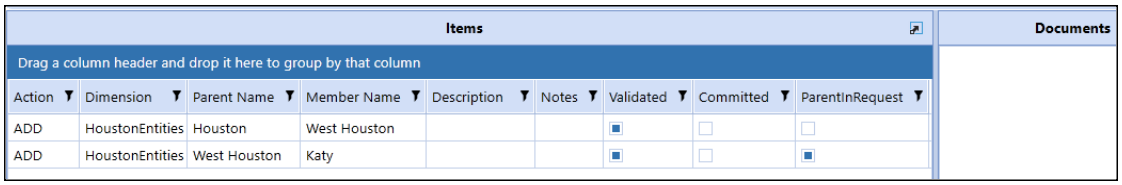
Request Summary and Workflow Buttons

- Request Summary
  - Request ID, Type, Current Step and Reason
- Request Workflow Buttons
  - **Unclaim**: Puts the request back into the queue as Unclaimed for other approved users to claim and redirects back to the Application Control Manager Home page.
  - **Remove**: Rejects and closes the current request. You can no longer edit the request after this action.
  - **Revert**: Pushes the request back to the previous step in the request flow.
  - **Validate**: Checks the validation status of all items in the current request.
  - **Advance**: Moves the request to the next step in the request flow.
  - **Home**: Redirects to the Application Control Manager Home page.

Request Buttons

- **Add**: Opens a dialog box to create a new item.
- **Remove**: Deletes the selected item.
- **Attach**: Opens file explorer to attach a supporting document.
- **Delete**: Deletes the selected document.
- **View**: Downloads the selected document.

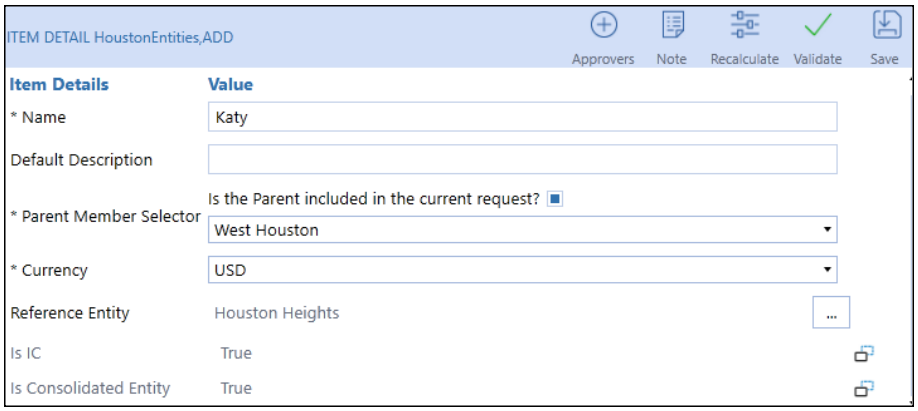
Item Table and Documents



- **Item Group**: For Grouped Request Types (such as Cost Center), shows the Item Name of the Group Parent Item.
- **SubItem**: True/False, 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 at the Commit step.
- **Dimension**: OneStream dimension to be updated at the Commit step.
- **Parent Name**: OneStream parent member name.
- **Member Name**: OneStream member name.
- **Description**: OneStream description.
- **Notes**: An input text field that is specific to the particular item.
- **Validated**: True/False, indicates if all item properties are valid.
- **Committed**: True/False, indicates if an item has been successfully committed.
- **ParentInRequest**: True/False, indicates if the Parent is included in the request.

Item Detail and Item Buttons

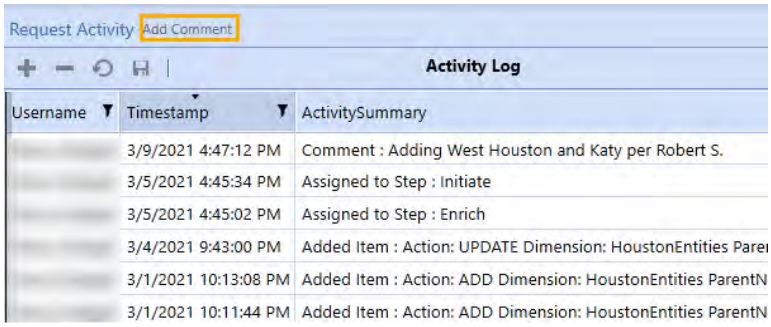
Enter or review properties for the item. Properties displayed here are set on the associated view.



- **Approvers**: Add approvers to the current item.
- **Note**: Enter a note for the current item.
- **Recalculate**: Recalculates or refreshes the values for any calculated properties assigned to the view.
- **Validate**: Runs validations assigned to the current item.
- **Save**: Saves the current item properties.

Request Activity

View a running log of the current request activity. Click **Add Comment**to include additional commentary for the request.



Reports

Reports display in grid or PDF view.

- **Bridge Metadata Report**: Displays all metadata changes made and the requester, action and status within Application Control Manager.
- **Request Audit**: Displays all requests made within a specified time.
- **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.

Export Report Data

To export the data, right click anywhere on the table, select **Export**and then select the format for export:

- Excel XML
- CSV
- Text
- HTML

Administration

On the Administration page you can define controlled governance:

- **Metadata**: Set up dimensions, actions, and imports.
- **Security**: Enable and disable allowed security actions.

- **Properties**: Works with OneStream-defined properties and custom properties.
- **Validations**: Business rules can be set up to ensure user entry is appropriate.
- **Views**: Create and edit views. Assign properties and validations to views.
- **Flows**: Create the steps in the request approval process.
- **Reports**: Create custom report sets.
- **Exports**: Create and copy export groups and files.
- **Logs**: View log details.

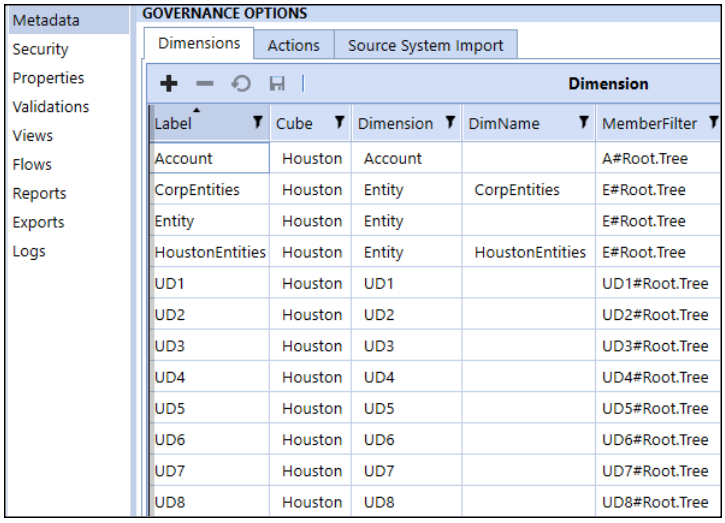
Metadata

Provides options for the metadata governance set up of Application Control Manager. There are three tabs for metadata information:

- Dimensions
- Actions
- Source System Imports

Dimensions Tab

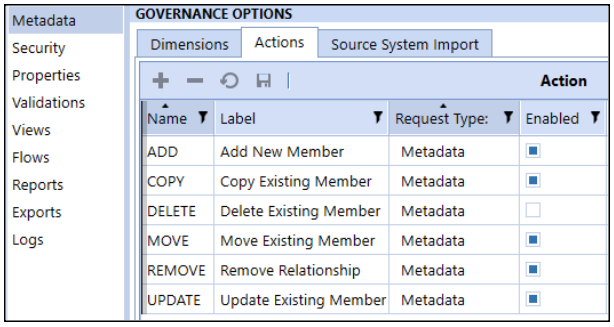
Use this tab to manually define the dimensions that you want to be able to update in a request.



- **Label**: Unique label for the dimension. Click ➕ to add a new dimension.
- **Cube**: Cubes in the current OneStream application.
- **Dimension**: OneStream dimension types.
- **DimName**: OneStream dimension names.
- **MemberFilter**: Text input field to assign the default member filter associated with this dimension.
- **Grouped**: Default is False. Set to True to create a Grouped Dimension type. If enabled, when a new item is created, an item is created for each dimension defined in the GroupedDim property. The “Grouped” dimension is not a true OneStream dimension and is not committed to the Metadata Dimension Library.
- **GroupDim**: A comma-separated list of the dimension labels that you want to group together.

Actions Tab

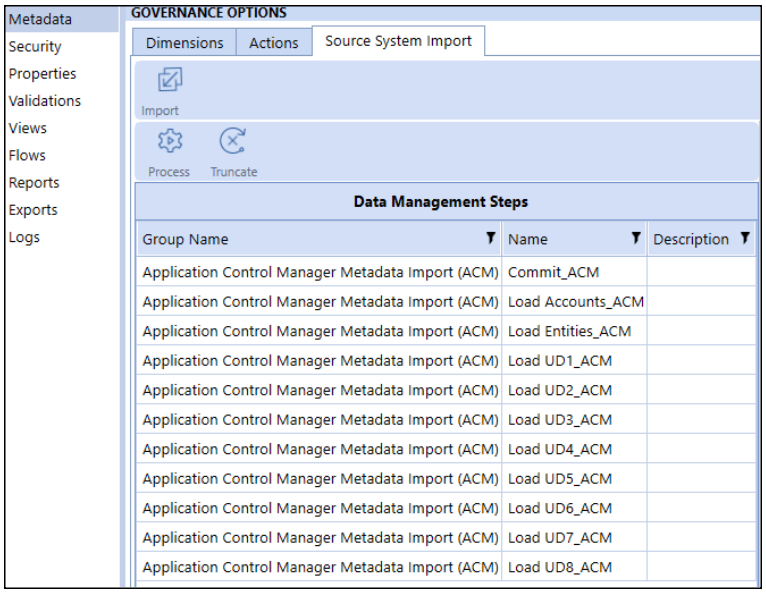
Use this tab to enable or disable actions.



- **Name**: Unique name for the action in Application Control Manager. These actions are not editable and do not allow additions.
- **Label**: Display name of the action in Application Control Manager.
- **Request Type**: The type of request that uses the action in Application Control Manager.
- **Enabled**: Enable or disable actions for your Application Control Manager design.

Source System Import Tab

Use this tab to manage source import options of Application Control Manager.

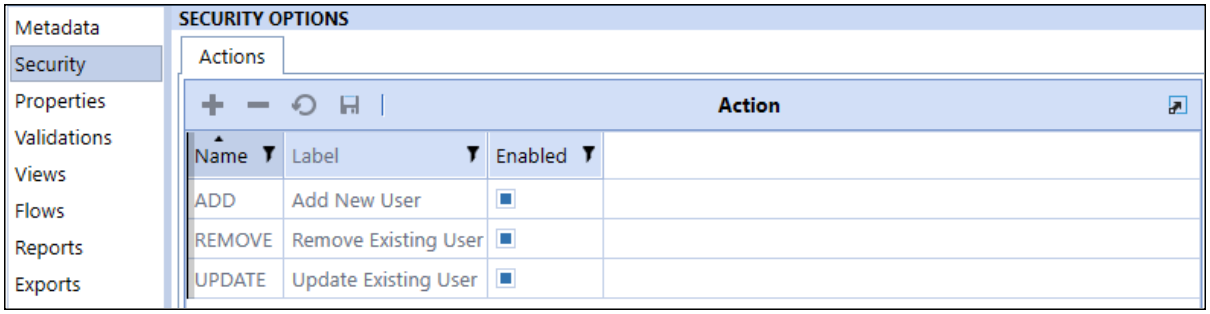


- **Process**: Launches the data management step selected in the table.
- **Truncate**: Truncates the member and tree tables for the selected dimension.

Security

Provides options for the security governance set up of Application Control Manager. You can manage the settings for security-type requests on the **Actions** tab.

> **Note:** You cannot add additional actions.



- **Name**: Unique name for the action.
- **Label**: Display name for the action.
- **Enabled**: Enable or disable the action.

Properties

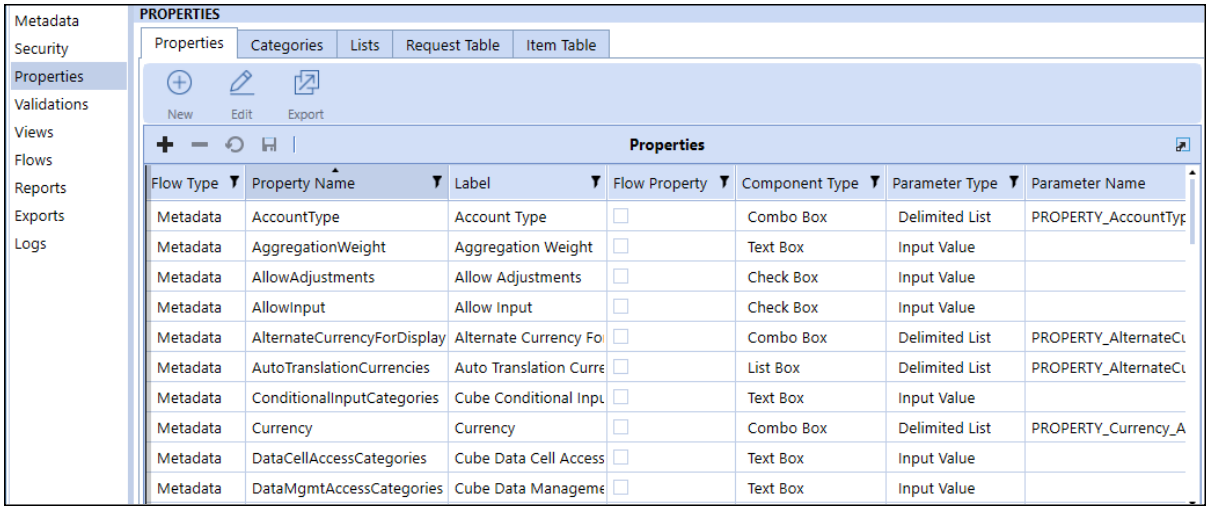
Properties are values that you want a user to be able to update. There are two types of properties:

- OneStream defined properties, such as any of the built-in metadata properties.
- Custom properties, which you can create to hold additional information

Properties can be assigned to property categories to better organize common properties or dimension-specific properties into groups.

Properties are attached to views.

Properties Tab



Flow Type: Specifies the type of flow this property belongs to. Available options are: Metadata, Capital, Security, and Generic.

Property Name: Unique property name. Click ✚ to add a new property.

Label: Descriptive label to be used across the solution.

Flow Property?: Indicates if the property can be assigned at the flow level.

Component Type: List of dashboard components you can assign to a view. These are the same as the default OneStream components:

- Check Box
- Combo Box
- List Box
- Member Selector
- Text Box

These are custom components leveraging OneStream components, but provide specific functionality for Application Control Manager:

- Parent Member Selector: Member selector specifically for a Parent property, to distinguish from a default Member Selector for other properties.
- Security Group Selector: Member selector that pulls from OneStream security groups.
- Alternate Hierarchy: Member selector that creates a copy of the current item and creates the new member in an alternate hierarchy

Parameter Type: The type of parameter attached to the component:

- Literal Value
- Input Value
- Delimited List
- Bound List
- Member List
- Member Dialog

Parameter Name: If necessary, select an existing parameter to populate choices in the delimited list, bound list, and so on.

Namespace: Indicates if the property is built in OneStream or is custom.

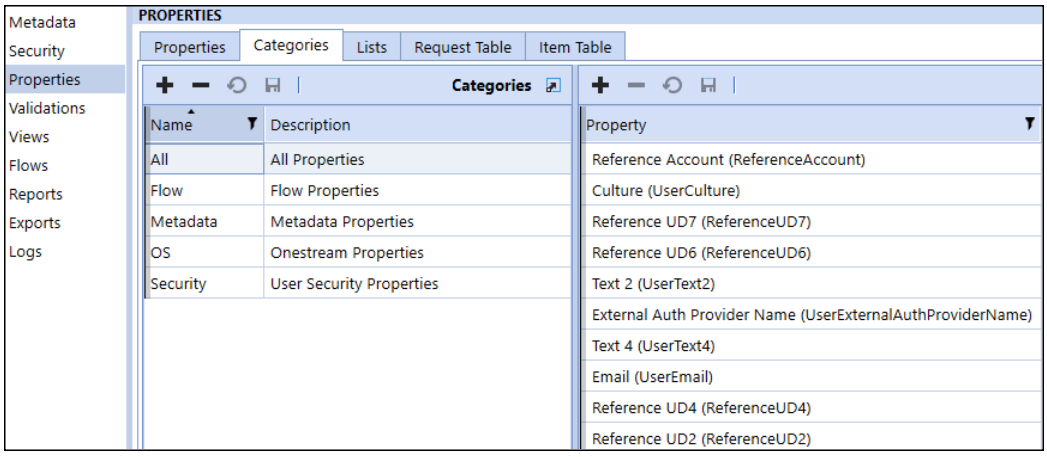
Default Value: Sets the default value for the property. The default value is blank.

Property Options: Optional. Name-value pairs used to override default settings throughout the solution. Property option values can be strings or parameters in the OneStream format, for example, `|!ParameterName!|`.

- **IsName**: Indicates that this property is a Name property. Used for Custom Name properties.
- **IsDesc**: Indicates that this property is a Description property. Used for Custom Description properties.
- **IsRef**: Indicates that this is a Reference member.
- **IsParentName**: Indicates that this property is a Parent Name. Used for Custom Parent properties.
- **PropName**: Used for custom properties. Set the OneStream property this should update.
- **DimTypeName**: Overrides the default DimTypeName on Member Selector type components
- **Dimension**: Overrides the default Dimension on Member Selector type components
- **MemberFilter**: Overrides the default MemberFilter on Member Selector type components
- **CubeName**: Overrides the default CubeName on Member Selector type components
- **Tooltip**: Sets the tooltip on the component

Categories Tab

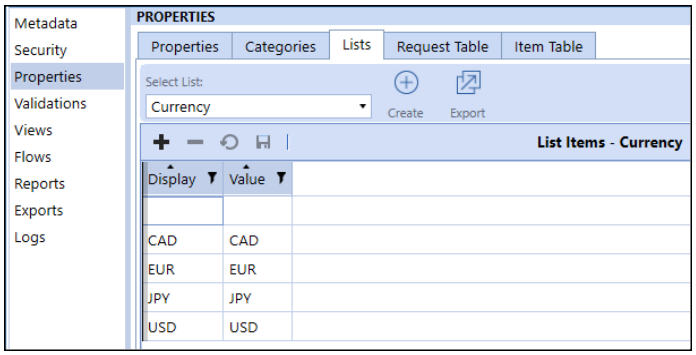
Property categories are used to organize similar properties or dimension-specific properties into groups. Category groups are listed on the left. The properties assigned to the group are on the right.



These property categories display when adding properties to views.

Lists Tab

On the Lists tab, you can create name-value pairs list to be used as references in properties. An example of how you might use a property list would be for a drop-down list in a property.



Click **Create** to create a new list.

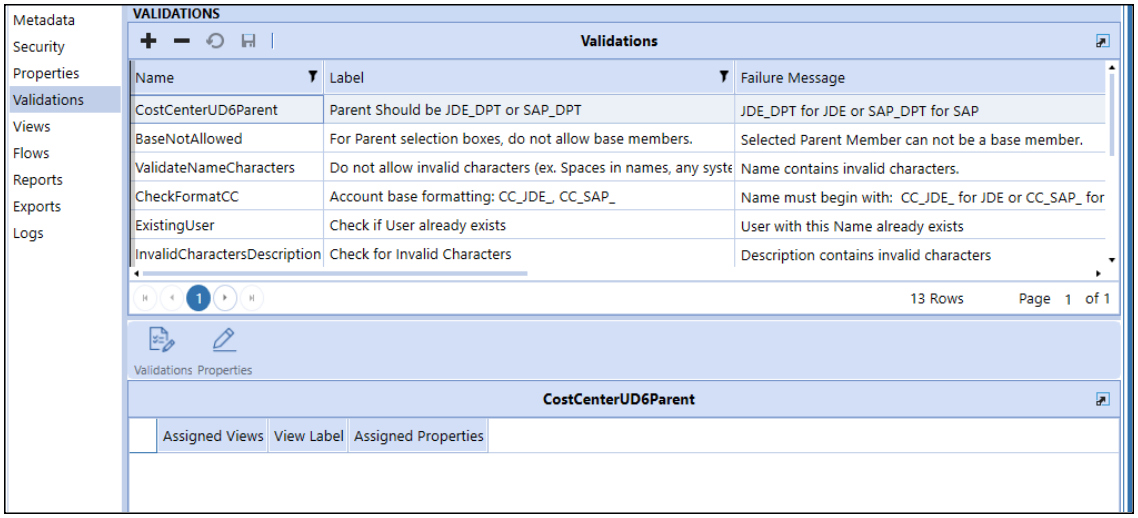
- **Display**: Display text that a user sees when interacting with the list. Click ➕ to add a new list member.
- **Value**: Value is used by the system when making changes.

Request Table and Item Table Tabs

The Request Table and Item Table tabs are system-generated and cannot be updated by the administrator.

Validations

Validations are business rules that run to check that user input follows specific rules.



Name: Unique validation name.

Label: Description of validation.

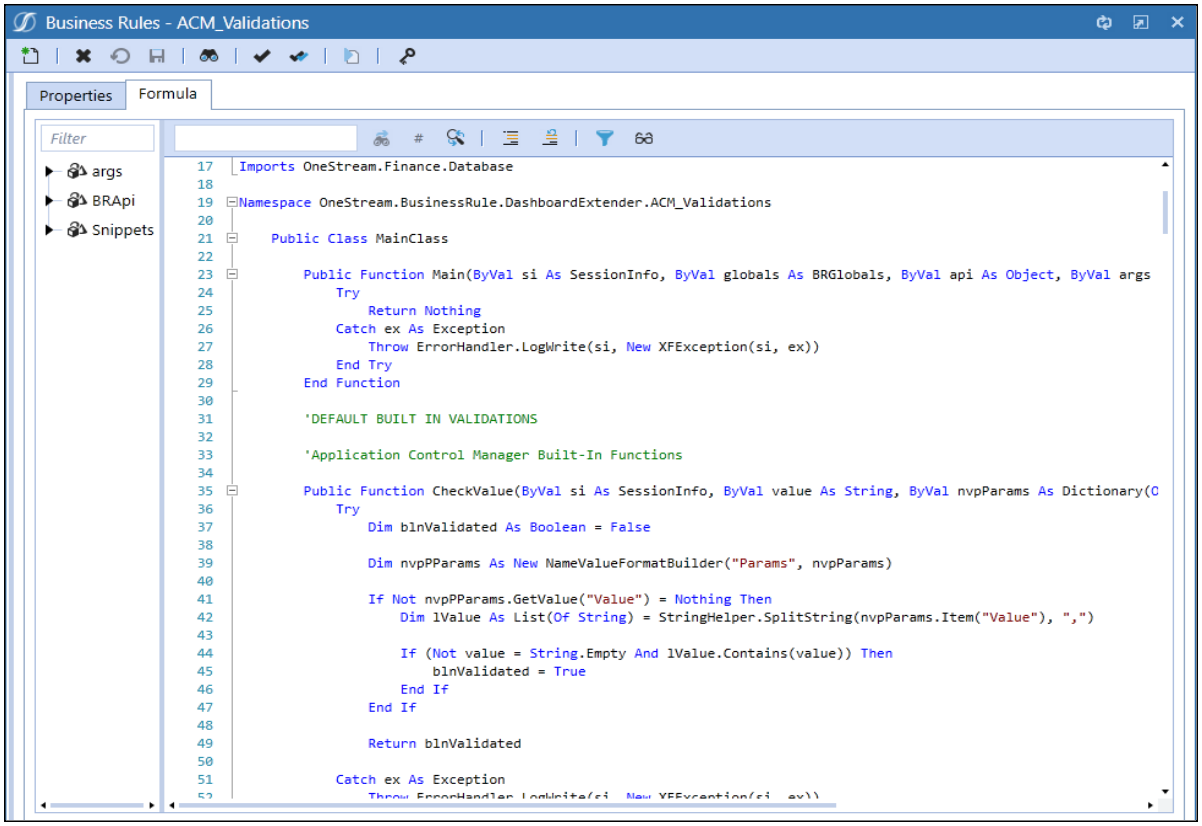
Failure Message: Message that displays when the validation fails.

Class: All validations are set to script.

Parameters: The business rule and associated parameters needed to run the validation script.

Validation Business Rules

To run properly, all validation scripts should be created in the ACM_Validations business rule.

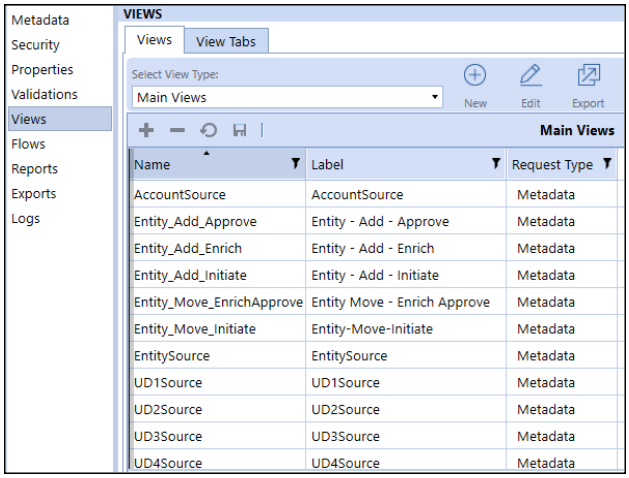


Views

A view is what you want a user to see at an Application Control Manager step. Properties and validations are assigned to views and then the view is assigned to a flow step.

Views Tab

Click **New** and **Edit** to create and edit views.



Name: Unique view name.

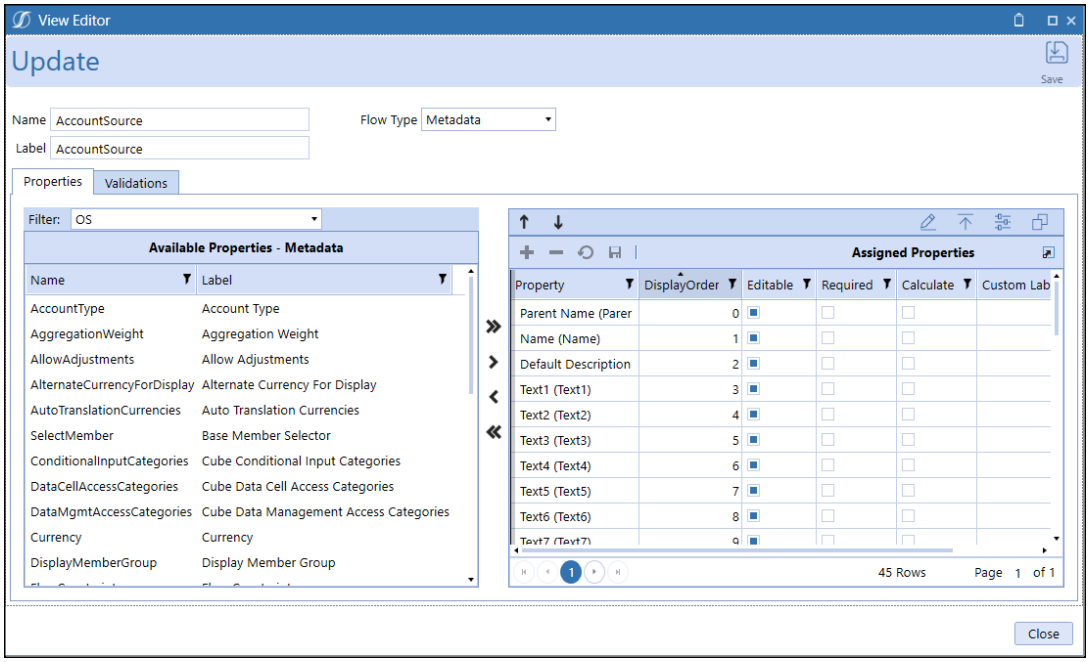
Label: Description of view. It's helpful to include dimension, step, and action.

Request Type: This is selected from a list after view creation. Available types are: Metadata, Security, and Generic.

View Editor

To get into a view, select a view and then click **Edit**.

Properties Tab: Consists of two lists: Available Properties and Assigned Properties.

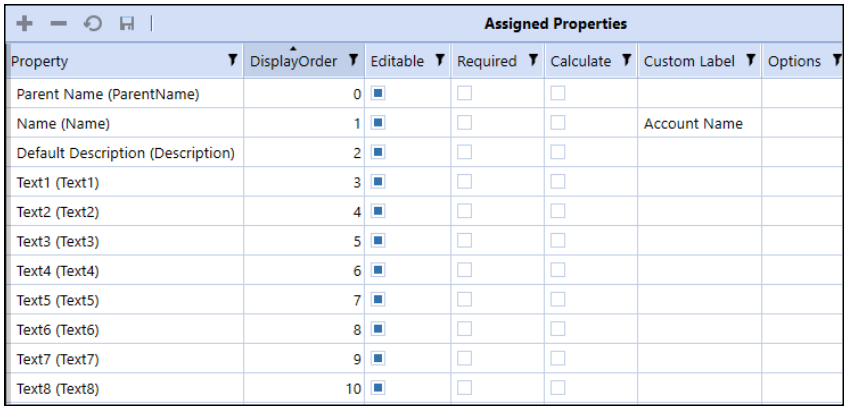


The Filter drop-down list allows you to switch between property categories to quickly see which properties are available to assign to the view.

Use the center arrow buttons to add or remove the currently selected property or all properties to or from the assigned properties list.

Use the Assigned Properties toolbar to:

- : Move the selected property up in the display order.
- : Move the selected property down in the display order.
- : Toggle the editable property for all assigned properties.
- : Toggle the required property for all assigned properties.
- : Toggle the calculate property for all assigned properties.
- : Open a window to select an existing view from which to copy all properties .



Assigned Properties

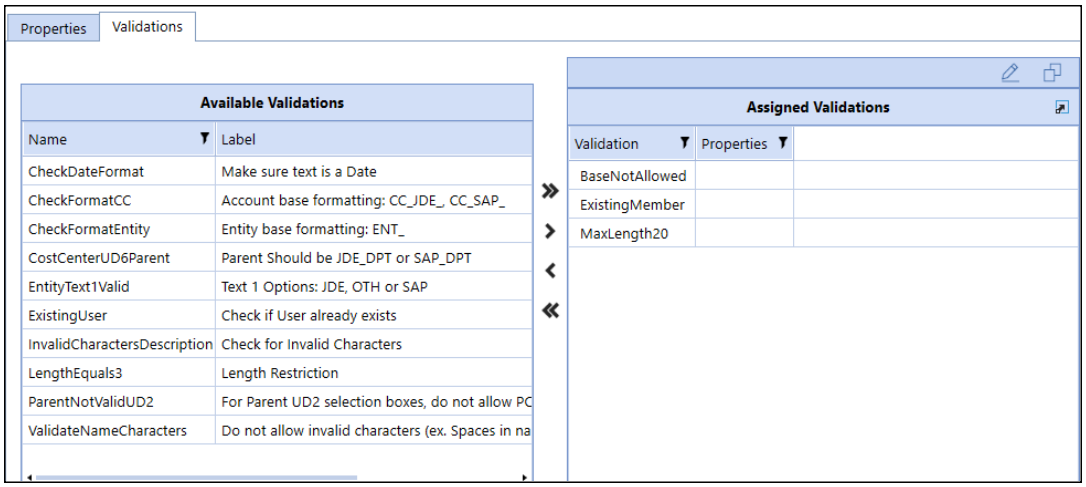
Property	DisplayOrder	Editable	Required	Calculate	Custom Label	Options
Parent Name (ParentName)	0	■	☐	☐		
Name (Name)	1	■	☐	☐	Account Name	
Default Description (Description)	2	■	☐	☐		
Text1 (Text1)	3	■	☐	☐		
Text2 (Text2)	4	■	☐	☐		
Text3 (Text3)	5	■	☐	☐		
Text4 (Text4)	6	■	☐	☐		
Text5 (Text5)	7	■	☐	☐		
Text6 (Text6)	8	■	☐	☐		
Text7 (Text7)	9	■	☐	☐		
Text8 (Text8)	10	■	☐	☐		

After you assign the property to the view, configure the following settings:

- **Display Order**: Order property displays on the view.
- **Editable**: Indicates if the property can be edited.
- **Required**: Indicates if the property is required. If True, it will not pass validation if left blank.
- **Calculated**: Indicates if the property is calculated based on another property.
- **Custom Label**: Overrides the property label.
- **Options**: Name Value pairs that are used for solution functionality.
    - **Tooltip**: Overrides the property tooltip.
    - **UseRef**: Use the property values from the Reference member assigned in the view.
    - **DimTypeName**: Override the DimTypeName for the property.
- **Validations Tab**: Assign validations to views.

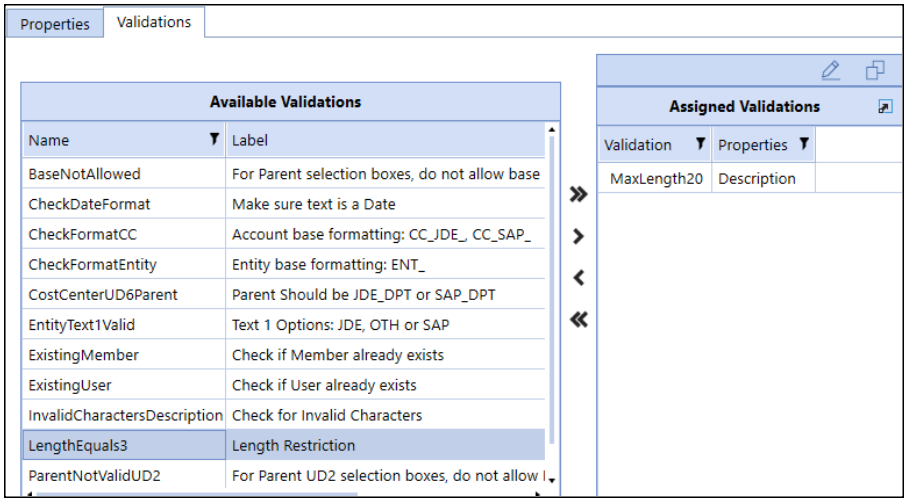
To assign validations to views:

1. Use the arrows to assign validations to the view.



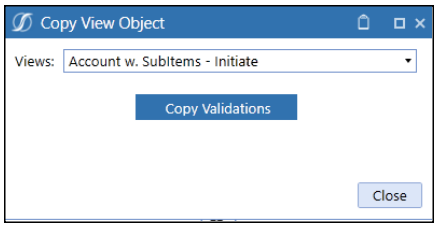
2. Do one of the following:

   - Select an assigned validation and then click to assign the validation to one or more properties.



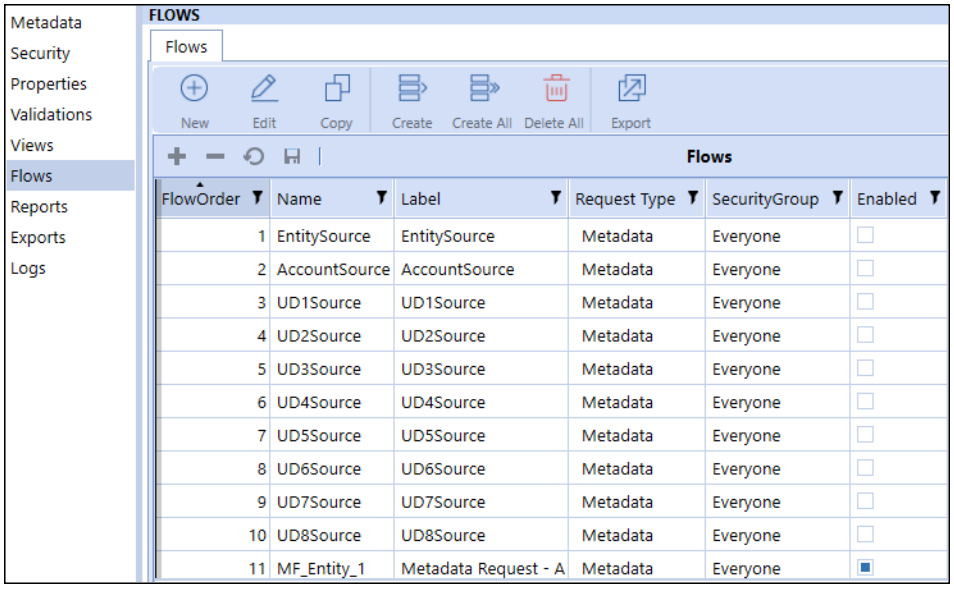
   - Click to copy validations from another view.

a. Select the view to copy from and then click **Copy Validations**.



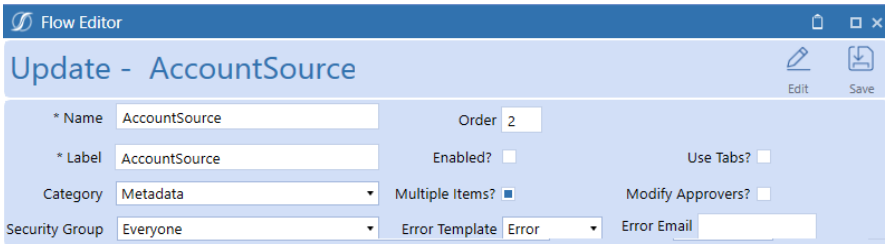
Flows

Flows represent the entire request approval process that a user completes when creating a request. Click **New** and **Edit** to create and edit flows.



Flow Editor

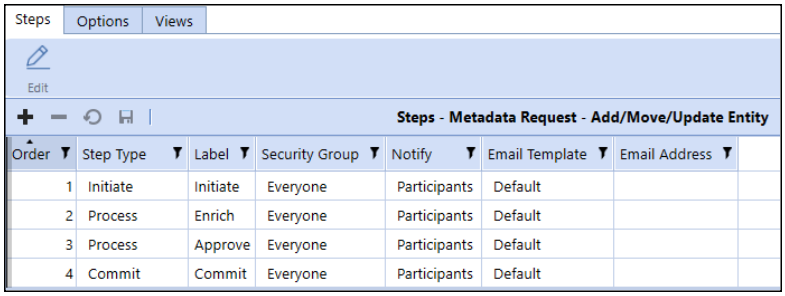
Summary: Properties associated with the flow.



- **Order**: The order the request type displays in the drop-down list when a user creates a new request.
- **Name**: Unique request flow name.
- **Label**: Descriptive label that users see for the request type.
- **Enabled**: Determines if the request type is visible in the new request drop-down list.
- **Use Tabs?**: Determines if the flow is using multiple tab views.
- **Category**: Available options are: Metadata, Capital, Security, and Generic.
- **Multiple Items?**: Determines if the request allows more than one item in the request.
- **Modify Approvers?**: Determines if the user is allowed to select the approver from a drop-down list of approver users.
- **Security Group**: Indicates who can initiate these types of requests.
- **Error Template**: Email template sent out for errors at the flow level.
- **Error Email**: Email group that receives flow error emails.
- **Edit**: Allows you to add a flow property to the flow level.
- **Save**: Save updates to these properties.

Steps Tab

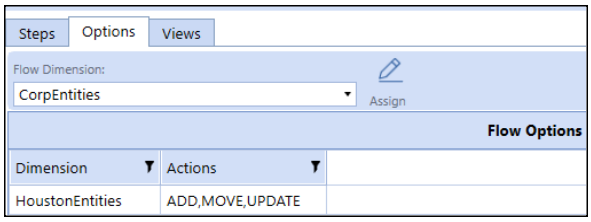
These are the steps in the approval process.



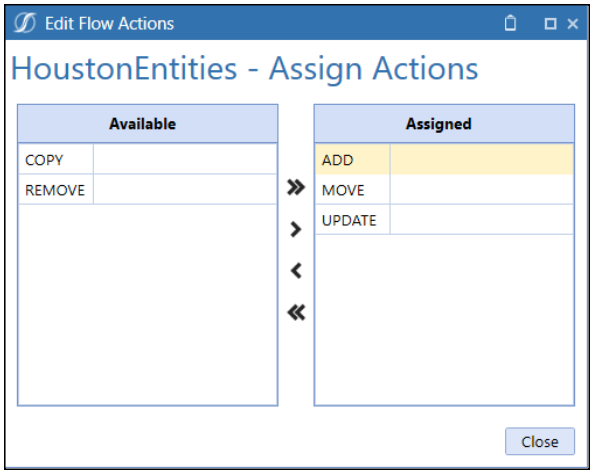
- **Order**: Step order. The Commit step is always the last step for metadata requests.
- **Step Type**: Built-in step types.
- **Label**: Unique label for flow-step combination.
- **Security Group**: Specify which group of users has access at each step.
- **Notify**: Select who gets notified on this step. ** Not currently implemented, only notifies email address defined.
    - None, Assignees, Participants, Assignees and Participants
- **Email Template**: Select the email template to use for notification.
- **Email Address**: Email group to be notified when the request is at the current step.

Options Tab

For Metadata request types, assign the dimensions to work with on this request type and then assign the actions to perform for each dimension.

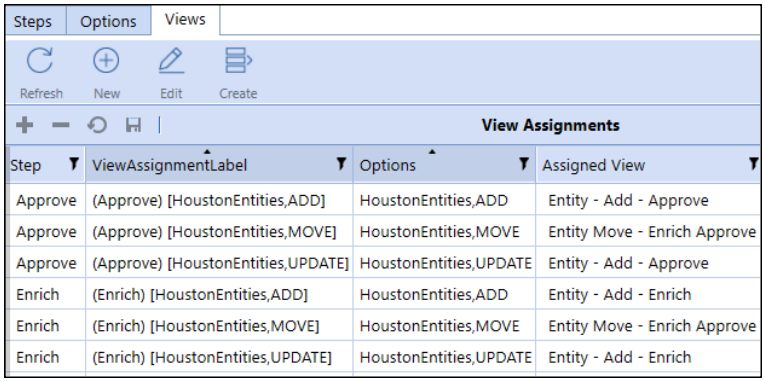


Assign Actions



Views Tab

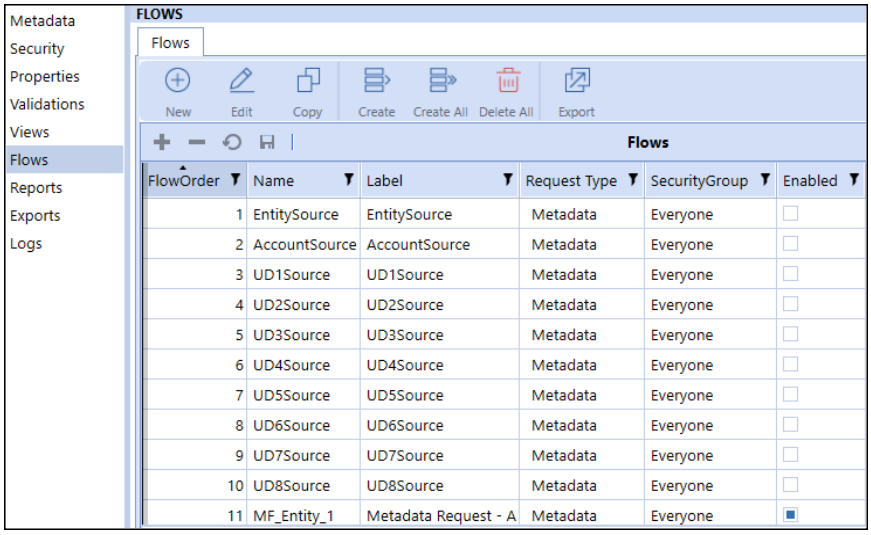
The Views tab allows administrators to assign the previously created views to each individual step-dimension-action in the flow process. The list is automatically created when you add a new step or option. You must select the Assigned View from the drop-down list. To edit an assigned view, select the view step and then click **Edit**.



> **Note:** If the View Assignment list looks incorrect or does not seem to be updated, click **Refresh**to manually refresh the list.

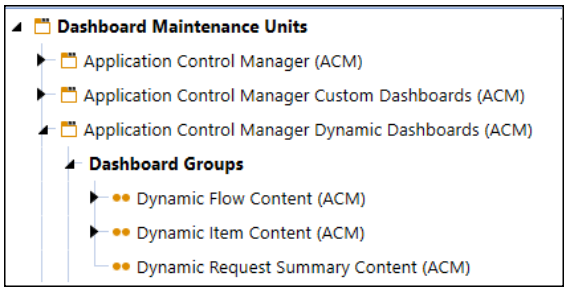
Create Dynamic Dashboard for Flow Views

After you create the flow and assign the views to each flow step, you must run a process to create the dashboard components. Go back to the main Flows screen:



- **New**: Create a new flow.
- **Edit**: Edit a flow.
- **Copy**: Copy a flow.
- **Create**: Create dynamic views for the selected flow.
- **Create All**: Create dynamic views for all flow.
- **Delete All**: Delete the selected row.
- **Export**: Export flows to a .CSV file for review in Excel or another text editor.

The dynamic dashboards are created in a specific Dashboard Maintenance Unit named Application Control Manager Dynamic Dashboards (ACM). The dashboards can be reviewed here.



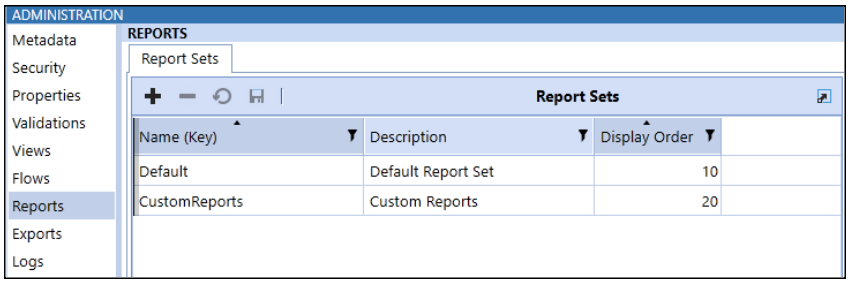
Important: Do not make updates to the Dashboard here because any changes are overwritten when the Create process runs. Only make updates using the View Editor.

Reports (Administrator)

The Reports page allows you to set up report sets for the Application Control Manager Reporting page. Click to access the Reporting page.

Report Sets

Use to group Application Control Manager reports into report sets.



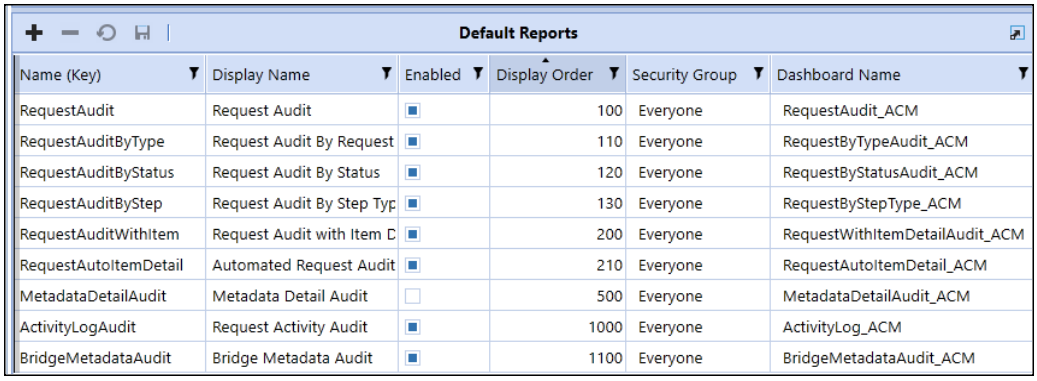
- : Add a new report set.
- : Delete selected report set.
- : Undo unsaved change.
- : Save changes to the report sets.

The workspace has three main columns:

- **Name (Key)**: Unique name for the report set.
- **Description**: More detailed description of the report set.
- **Display Order**: Arrange your report sets into numerical order.

Reports

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



Default Reports

Name (Key)	Display Name	Enabled	Display Order	Security Group	Dashboard Name
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
BridgeMetadataAudit	Bridge Metadata Audit	☑	1100	Everyone	BridgeMetadataAudit_ACM

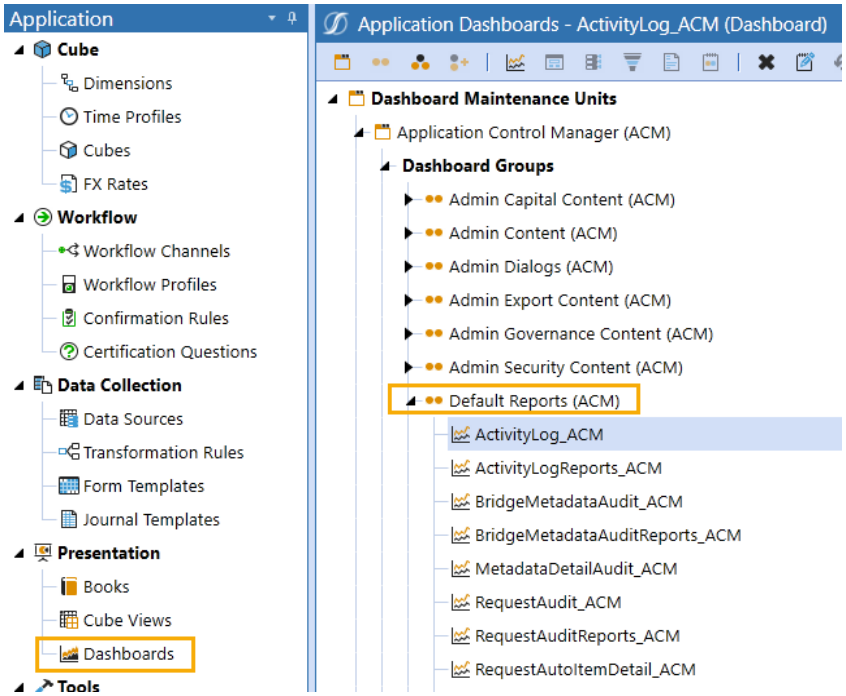
- : Add a report to the set.
- : Delete selected report from set.
- : Undo unsaved change.
- : Save changes to the report.

The dashboard has six 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.

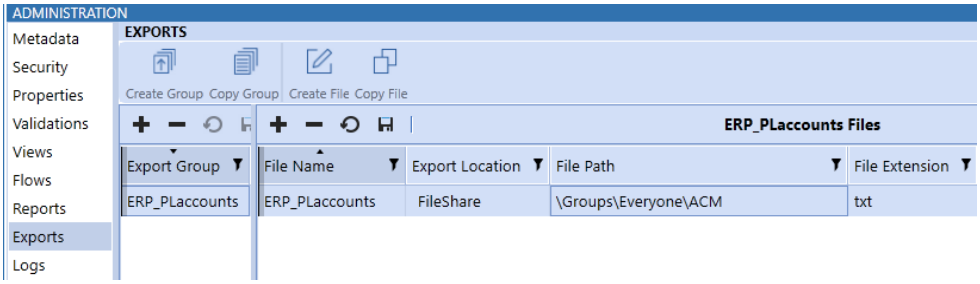
The reports dashboard groups are in Application > Presentation > Dashboards > Application Control Manager (ACM).

There are reports that come with Application Control Manager and are listed under Default Reports.



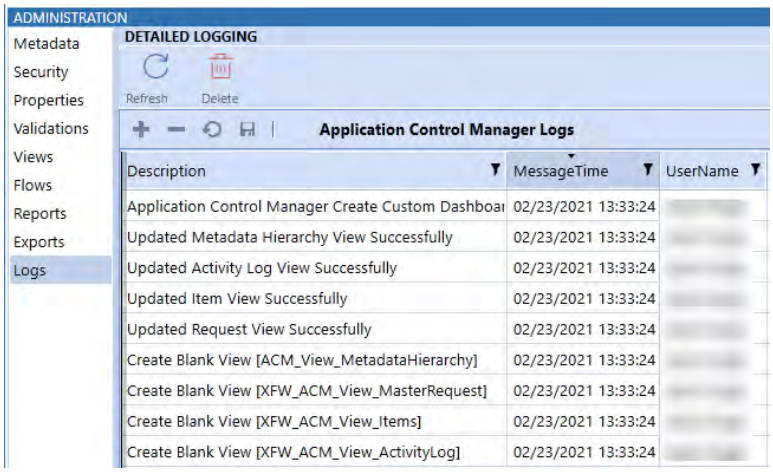
Exports

On the Exports page, you can create and copy export groups and files.



Logs

Application Control Manager has detailed logging where administrators can view all of the processing events including errors that have occurred in the solution.



Click **Refresh** to refresh the detailed logging screen. Click **Delete** to clear all Application Control Manager log files.

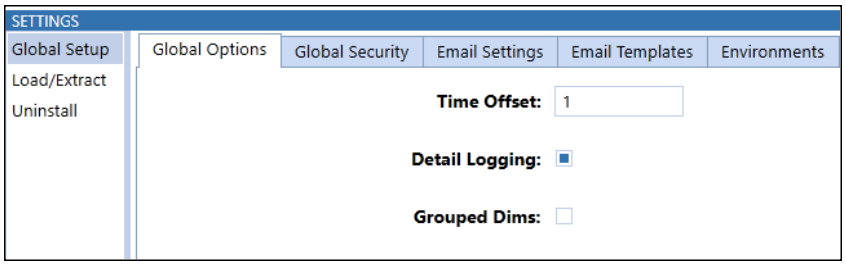
Settings

The Settings dashboard contains global solution configuration settings including initial setup, uninstall, and custom database table administration.

Global Setup

Global Options

Global configuration options apply to the entire solution.

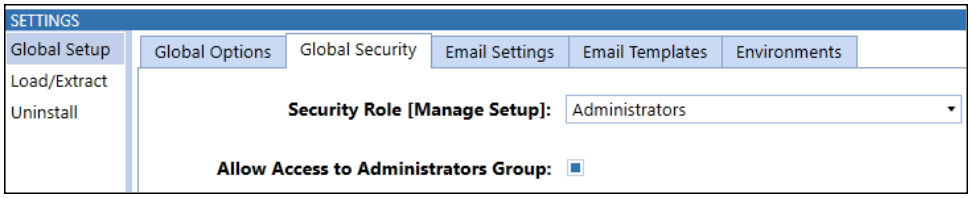


- **Time Offset**: Use to adjust the server time to the current time zone. This is the time stamp used on all activities within the solution. The value is the number of hours to adjust and can be a positive or negative number.

- **Detailed Logging**: Enable the Logs Administration Screen item. Otherwise, only the OneStream system logging is used.
- **Grouped Dims**: Enabled when one request needs to be applied to multiple dimensions.

Global Security

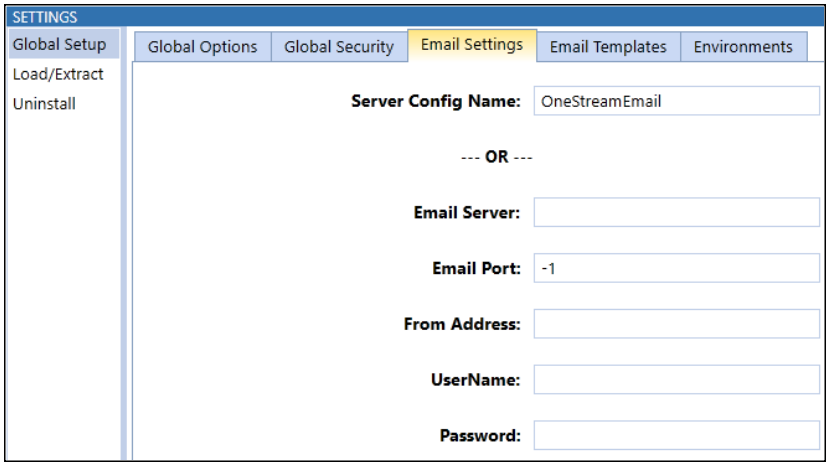
The global security tab is where you can assign security on who can manage Application Control Manager.



- **Admin Security Group**: Select the OneStream security group that will be the Application Control Manager Administrator.
- **Allow Access to Administrator Group**: Determines if the OneStream Administrator group has administrator access in Application Control Manager.

Email Settings

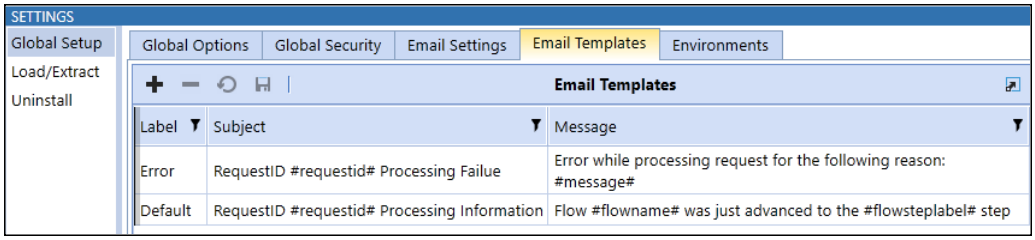
Email settings allow you set up the email account used to send notifications from Application Control Manager.



- **Server Config Name**: Uses the email connection defined on the OneStream server. Or you can set up a manual connection by filling in this information:
    - **Email server**: Email service address
    - **Email Port**: Port used by the email server settings
    - **From Address**: Email address which the messages should come from.
    - **Username**: Email username for the account
    - **Password**: Password for email account

Email Templates

Templates that are used for email notifications. You can use placeholders in the subject and message of the email message.



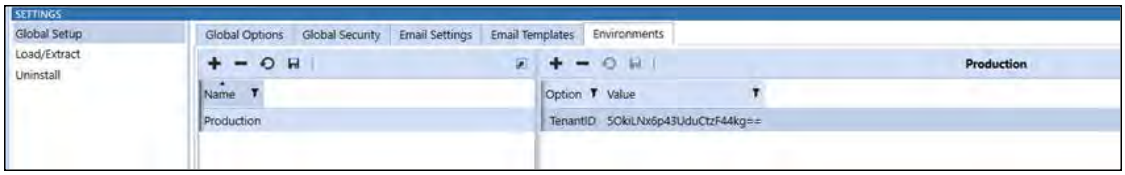
Email Placeholder Options

- FlowName
- FlowType
- FlowLabel
- FlowStepLabel
- FlowStepType
- Message
- Priority
- PriorFlowStepLabel

- RequestID
- Requester
- RequestStatus
- RequestReason
- RequestNextAction

Environments

Administrators can set up multiple environments to move metadata across environments.

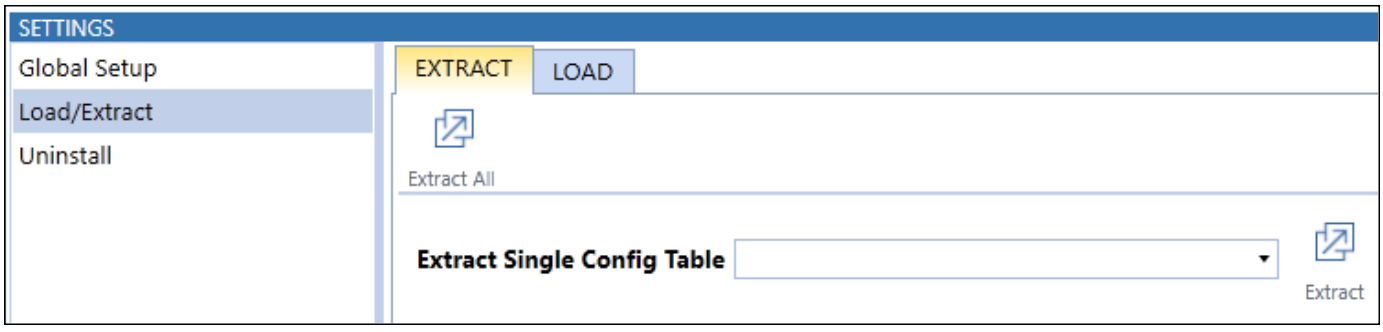


Load/Extract

This screen allows you to load and extract components or the entire Application Control Manager user interface.

Extract

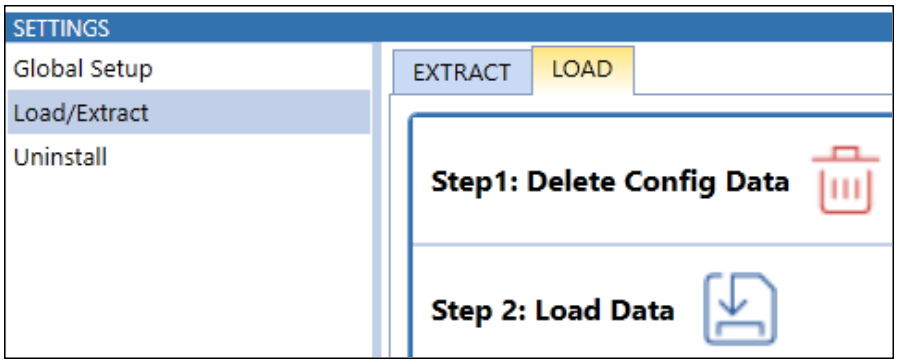
Use to extract the configuration and components of Application Control Manager.



- **Select Config Data to Export**: Select the specific configuration piece that you want to extract to a flat file for future import or backup.
- **Extract All Config Data**: Extracts all pieces of Application Control Manager configuration to a flat file for future import or backup.
- **Extract App Components**: Extracts all solution components to a zip file for backup or import.

Load

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



- **Delete Config Data**: Clears all current Application Control Manager configuration data. Use this before importing new configuration data from file.
- **Load Data**: Imports configuration data from file.

Other

Use to extract the entire Application Control Manager user interface.

Uninstall

1. In the Application Control Manager Dashboard, click ⚙ and then, under **Settings**, click **Uninstall**.
2. Select an option:

- **Uninstall UI** to remove the dashboards, business rules and keep all the data in the database tables. This is useful for updates to the solution.
- **Uninstall Full** to completely uninstall the solution including all components and data. This drops the custom database tables and removes all dashboards. You can't recover from this unless you have backed up both the dashboards and data.

Administration Tasks

Create a New Flow

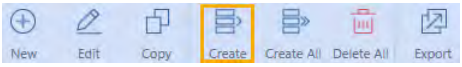
To create a new flow for a request type:

1. In the Application Control Manager Admin Dashboard, navigate to **Views**.
2. Create a view for each step that will be in the request flow.
    a. Assign the properties to the view.
    b. Assign the validations to the view.
3. Navigate to **Flows**.
4. Create a new flow and save it before adding steps, options, and views.
5. On the **Steps** tab, add the steps for your approval workflow.
6. On the **Options** tab, assign the Dimension-Actions combination that you want to be available for this flow.
7. After all steps and options are added, on the **Views** tab, select the Assigned View for each Step – Option combination.
8. Make sure the flow is enabled to make it available in the **New Request** drop-down list.
9. Save the flow and close the **Flow Editor**.
10. Run the **Create Flow Views** process.

Refreshing Dynamic View Dashboards

1. Make the necessary changes to the view or flow that you want to update. Changes can be updating a label, adding or removing a property, changing the order of the properties, adding or removing steps in a flow.
2. Go to **Administration**> **Flows**.

3. Select the flow that you changed.
4. Click **Create**.

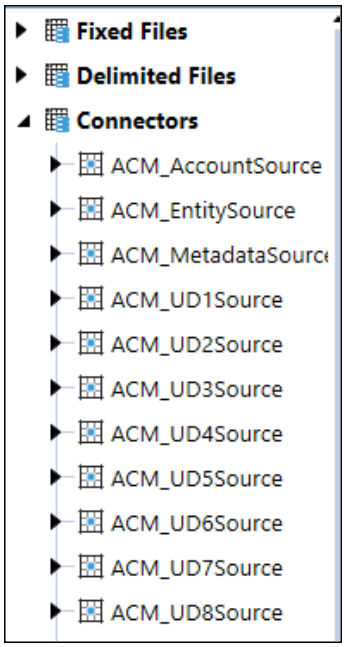


Tip: If you want to refresh all dynamic dashboards, click Create All.

Metadata Import

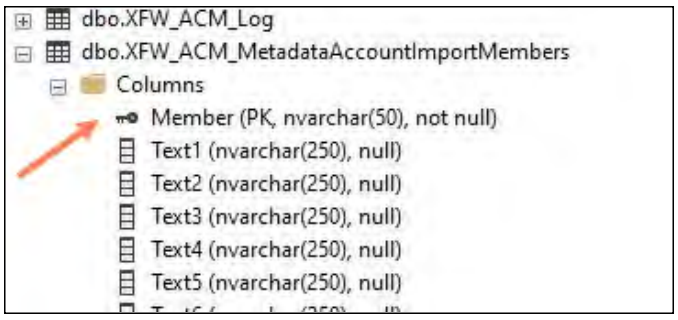
Setup Data Sources

When Application Control Manager is installed, a default set of data connectors is installed. There is one connector for each supported dimension:

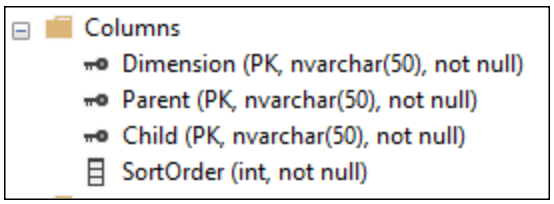


These data sources are set up to connect to staging tables which are created during the Application Control Manager installation process. These staging tables are named with the following format: ACM_Metadata<dimension>ImportTree and ACM_Metadata<dimension>ImportMembers.

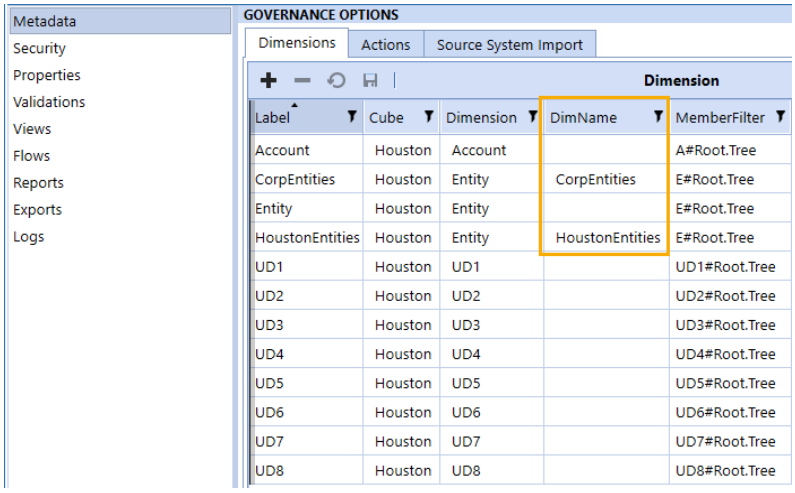
The tables with "Members" in the name store the unique list of members from the source metadata system. Each dimension table has a different set of properties that you can import into OneStream but the Member field must always be populated:



The tables with "Tree" in the name store the overall hierarchy details. Each table contains four columns.



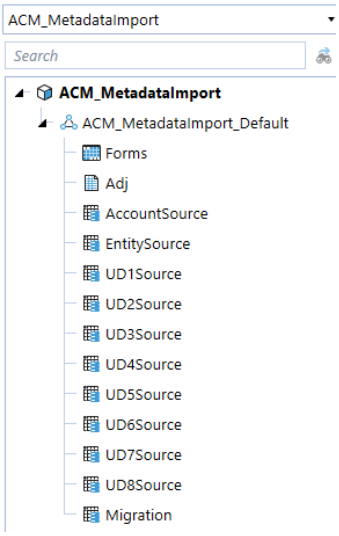
The Dimension column must be populated with the name of the Application Control Manager dimension that you are loading. This is set up in the Application Control Manager Administration screen:



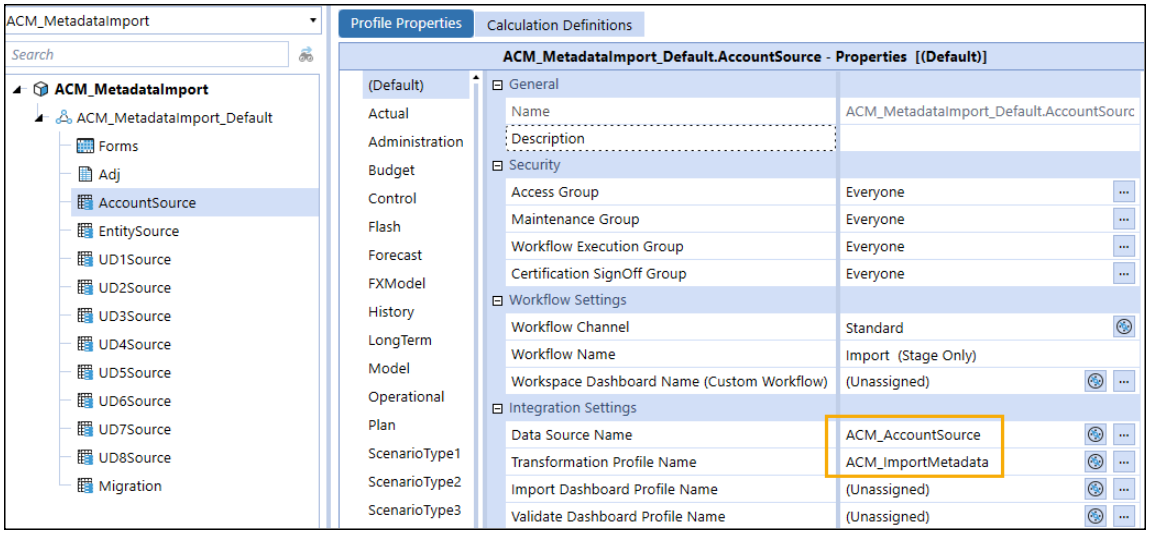
The Parent and Child columns are populated with member names found in the Member column of the associated Members table. SortOrder can be used to sort the hierarchy. If order is not important, enter a value of 1 for all rows in the hierarchy table.

Workflow Profiles

When Application Control Manager is installed, a Workflow Profile named ACM_MetadataImport_Default is automatically created in your system. In addition, a special cube is created: ACM_MetadataImport.



By default, the data source name for each dimension is set to utilize the data connectors mentioned in the prior step.



Select the transformation profile named ACM_ImportMetadata. This is automatically created in your environment when Application Control Manager is installed.

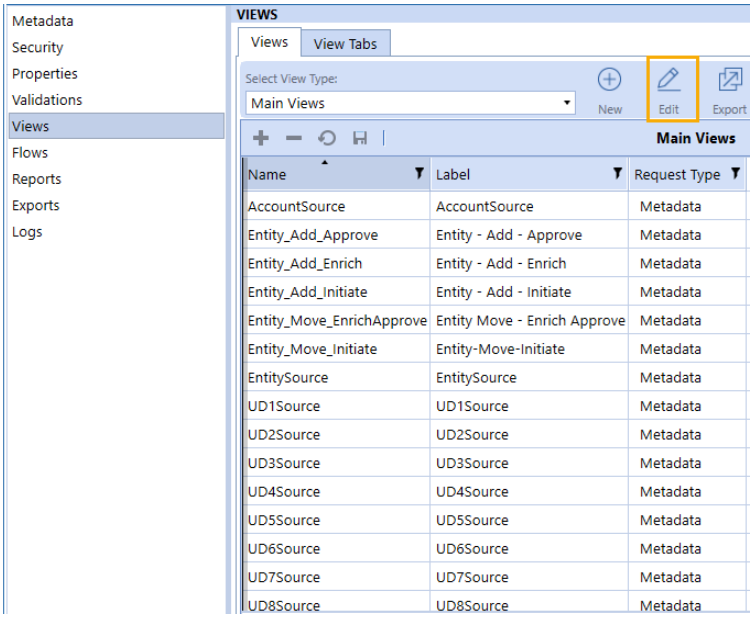
The Workflow Profiles are used to import the metadata loaded in the staging tables into the OneStream staging tables. After the information is loaded, the metadata is analyzed to determine differences that exist between the source data and the metadata stored in OneStream. The system looks for differences in this order:

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

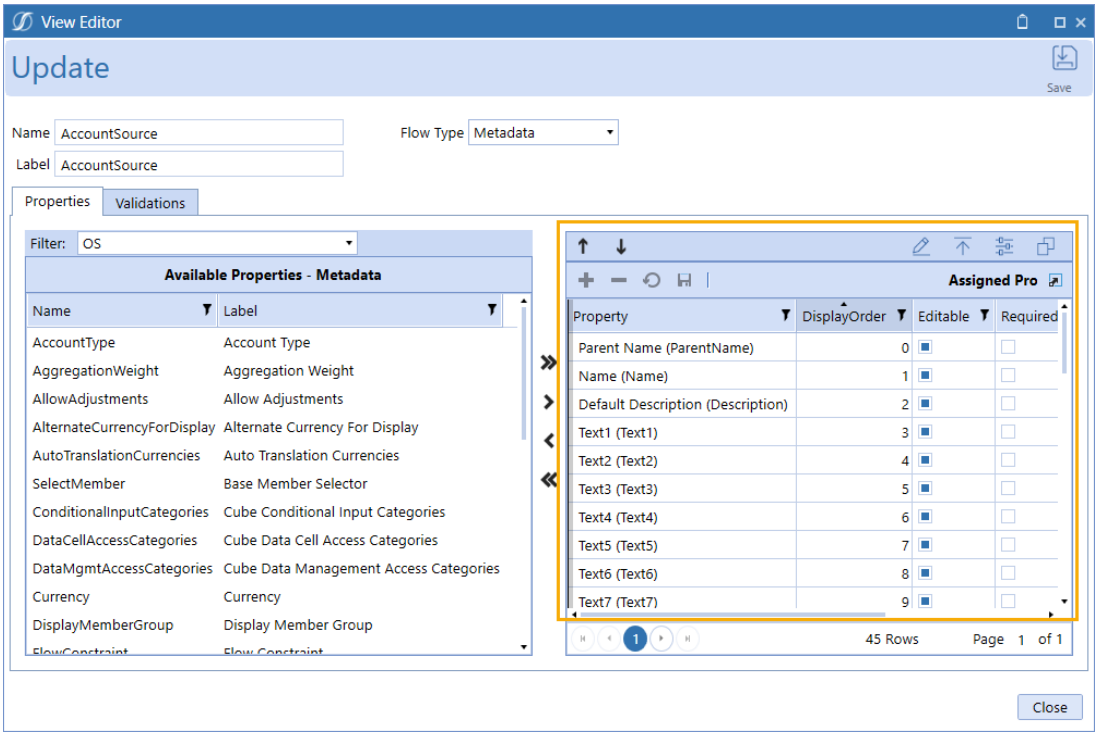
If Application Control Manager finds any updates it builds a request in the system. The results of this process are displayed on the main home page of Application Control Manager:

Metadata Import Fields

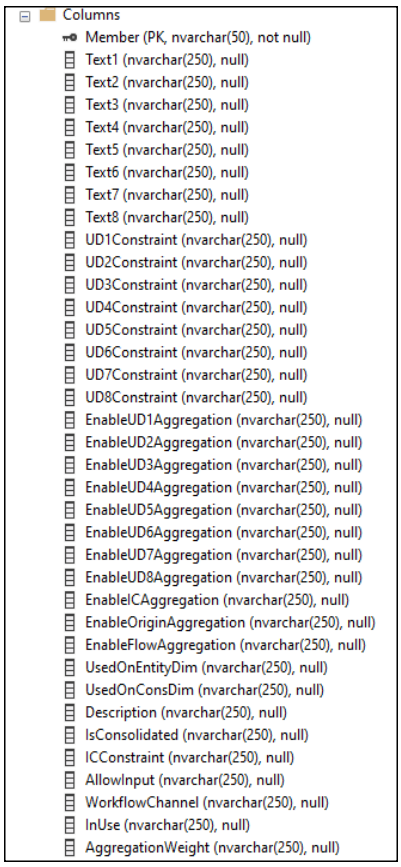
To map the import data to the metadata properties in OneStream, go to the Application Control Manager Administration screen and select Views. A single view for each workflow profile is created when Application Control Manager is installed. Select the one you want to modify and then click the Edit button:



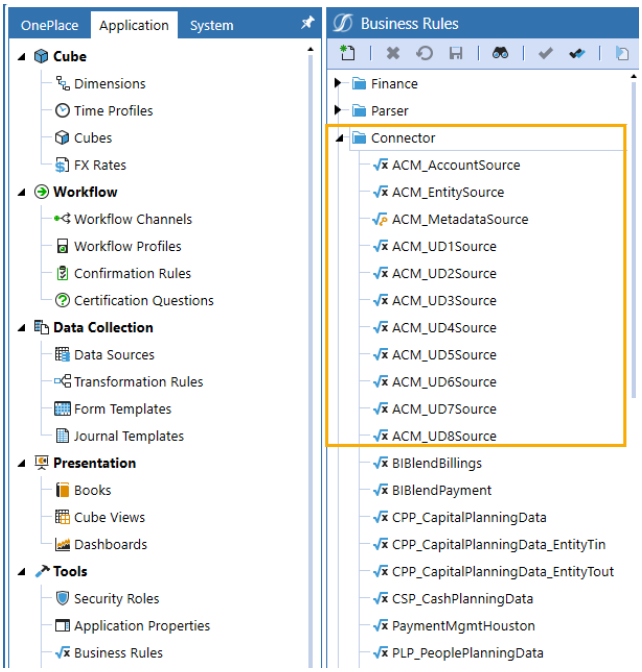
On the right side of the dialog, you can see the list of metadata properties that map to the columns in the database:



These match the information in the database:



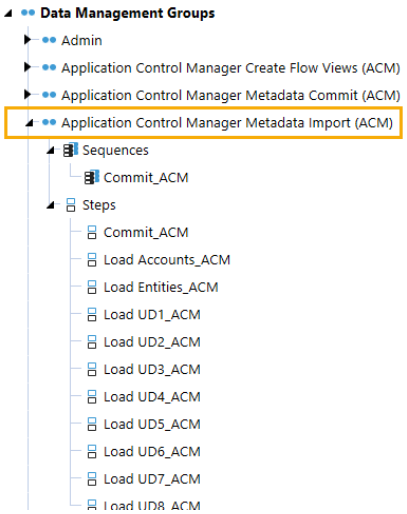
If you want to change the list of properties monitored and updated in OneStream, use the arrow buttons to move fields in and out of the list. If you do this, you must modify the related Connector Business Rule:



In the business rules, find the GetFieldList method and associated method containing the SQL to pull information from the database in GetSourceDataSQL. Make sure the fields match the order that Application Control Manager has in the associated view.

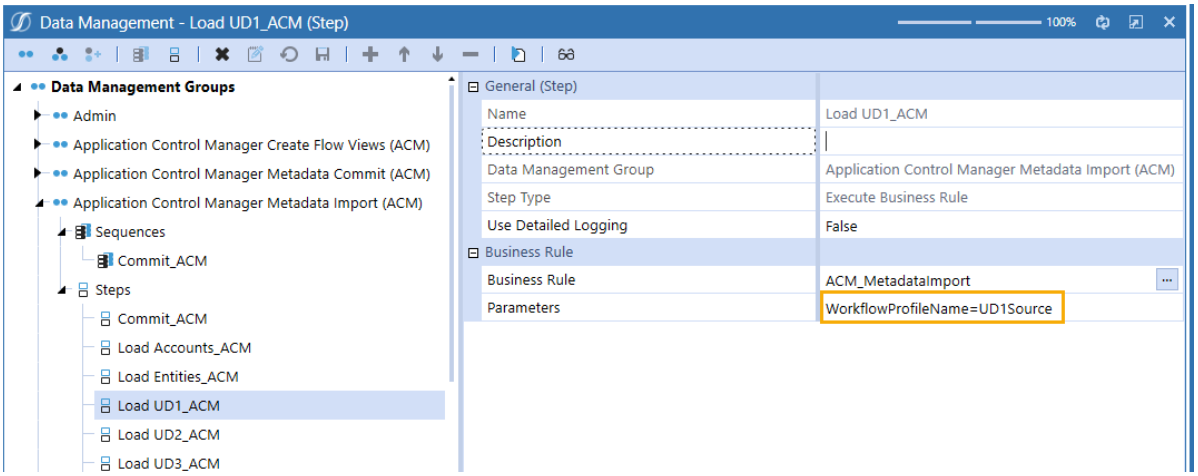
Data Management Groups

The process of loading and committing metadata updates to OneStream is handled using Data Management steps and sequences.



The data management steps are preconfigured when Application Control Manager is installed. The Load items are set up to execute the workflow profile associated with the dimension name. The process loads the data from the database into the OneStream staging tables, performs the comparison process, and builds a request if necessary.

The associated Workflow Profile is in the parameters on the data management step:



- WorkflowProfileName: Specify the name of the dimension you are importing for. This matches the Workflow Profile as well as the WF Profile Name in the Metadata Import Fields screen.

Ensure the business rule is set to ACM_MetadataImport.

The execution of the steps Load <…> perform the following steps:

1. Loads the data from the database or file into the workflow for the current global POV's time and scenario.
2. Compares the data loaded into OneStream to the existing members for the selected dimension and determines what members need to be added.
3. Compares the data loaded into OneStream to the existing hierarchy for the selected dimension and determines what updates are required to the overall hierarchy. In this step, updates such as adding a new parent-child relationship and creating a new sub-hierarchy for an existing set of members is.
4. Compares the data loaded into OneStream to the existing members and determines what properties need to be modified.
5. Compares the existing members and hierarchy in OneStream to the data loaded into the system to determine what members need to be removed from the hierarchy. Any member not in the import file/table is marked as orphaned in OneStream. The member is not deleted.
6. Builds an Application Control Manager request which performs all the required operations in a single transaction.

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

The Data Management Steps can be combined into a sequence to allow for the full automation of the process using a PowerShell script and the Windows Task Scheduler on the OneStream application server. You can automate the load and commit steps to include no user interaction before commit or you can set the system up to require an individual on the Finance team to review the request before manually committing it into the system.

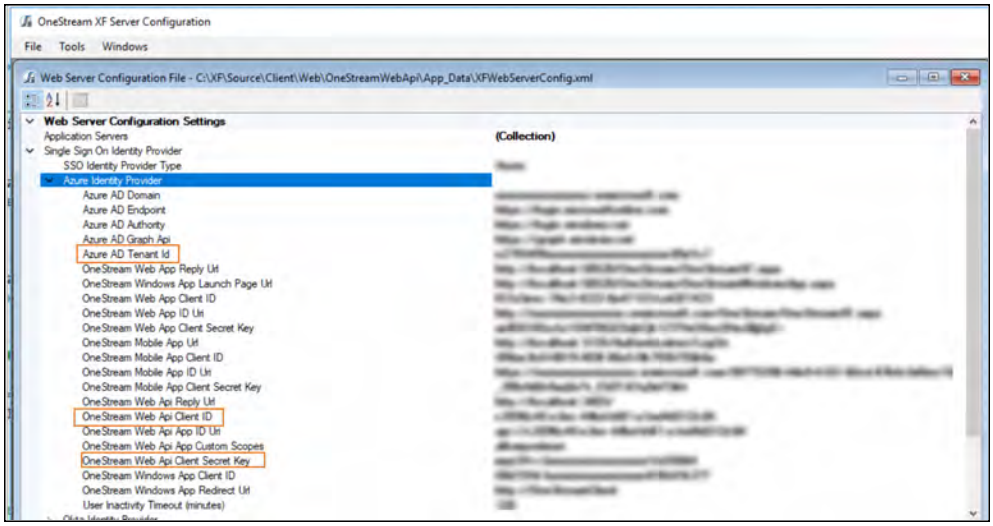
Metadata Synchronization

Initial Setup and Configuration

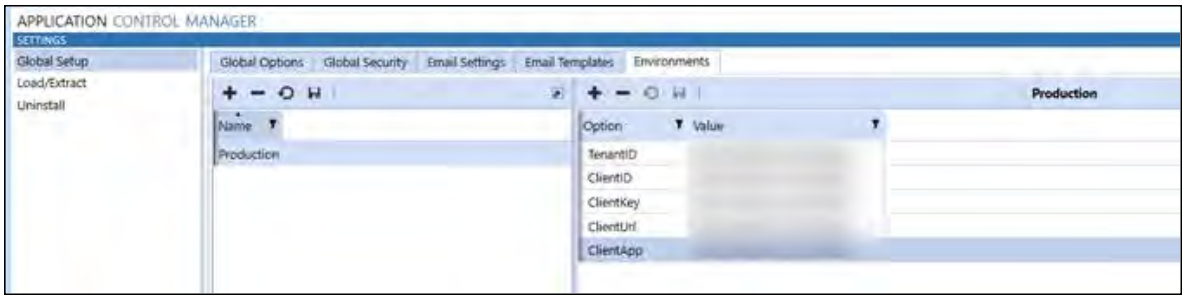
The metadata migration and synchronization feature of Application Control Manager keeps the metadata hierarchies between two OneStream installations/environments in sync with one another. This is accomplished by utilizing the REST API built into OneStream. The configuration is completed in the destination environment. The REST API in the source environment requires setup on the server side so ensure that the proper configuration is in place and 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

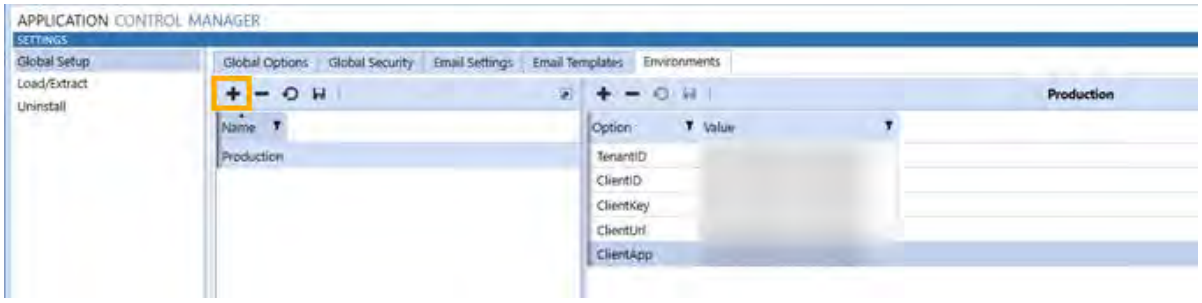
The first three values can be found in the OneStream XFWebServerconfig.xml:

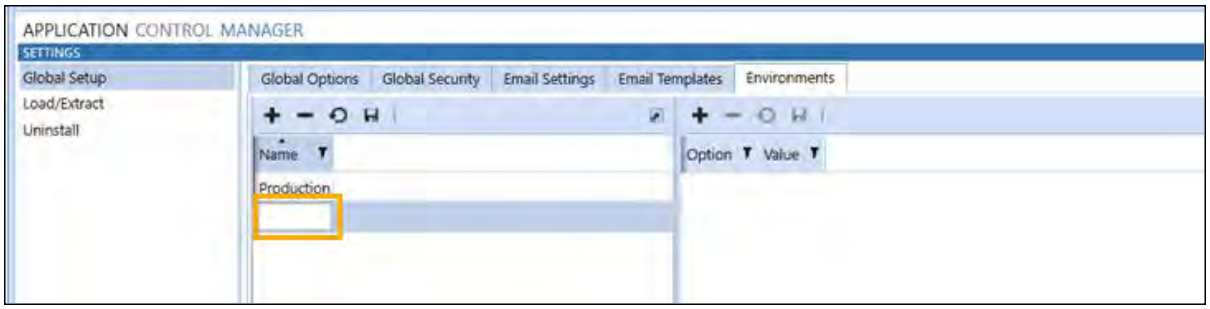


Enter these five values for the source OneStream environment into the Application Control Manager Setup screen:



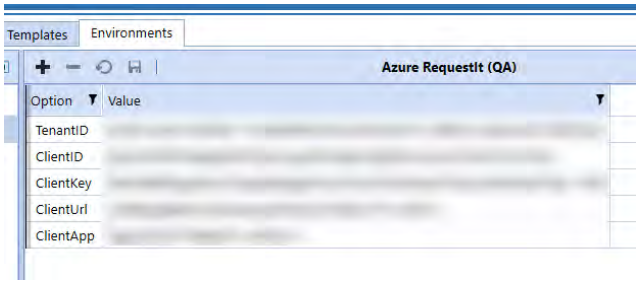
Start by adding a new source environment name in the left panel. This is for all environments that you want to synchronize metadata from and into the current environment:





Next, add the information gathered in the prior step for the REST API details of the source system.

In the right panel, click to add each value.

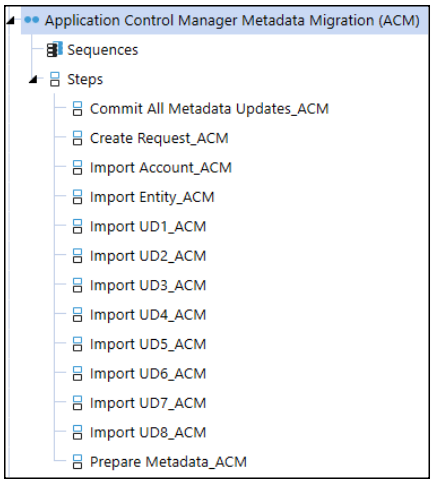


When finished, click and the system saves the data and automatically encrypts the values. They are encrypted at the database level for security purposes.

Should you need to update them in the future, copy new values over the encrypted information and the system re-encrypts after you save.

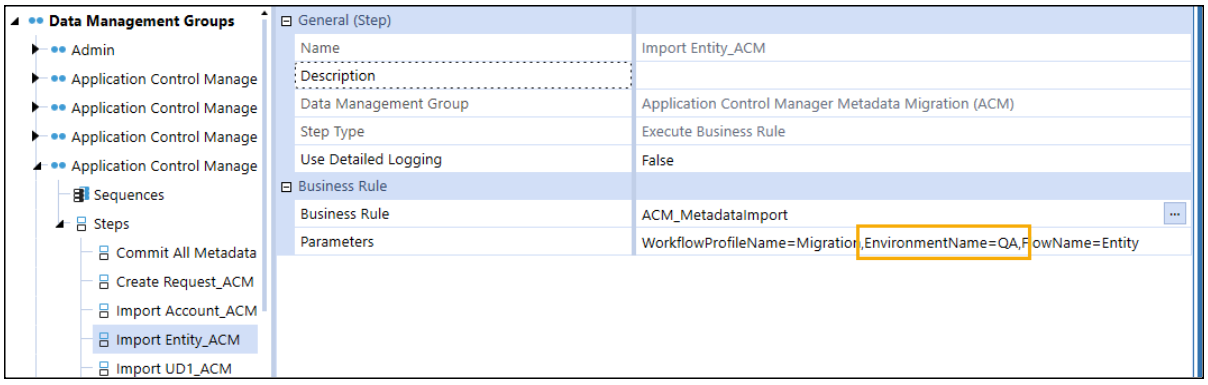
Data Management Job Configuration

The metadata synchronization process is executed via a Data Management job in OneStream. When Application Control Manager is installed, a Data Management Group named Application Control Manager Metadata Migration (ACM) group 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 EnvironmentName parameter is entered in the initial setup step from Application Control Manager:



The WorkflowProfileName is always “Migration” and the FlowName matches the workflow profile name. These two values should not be changed.

Execution

When any of the Load <dimension name> steps are executed the following occurs:

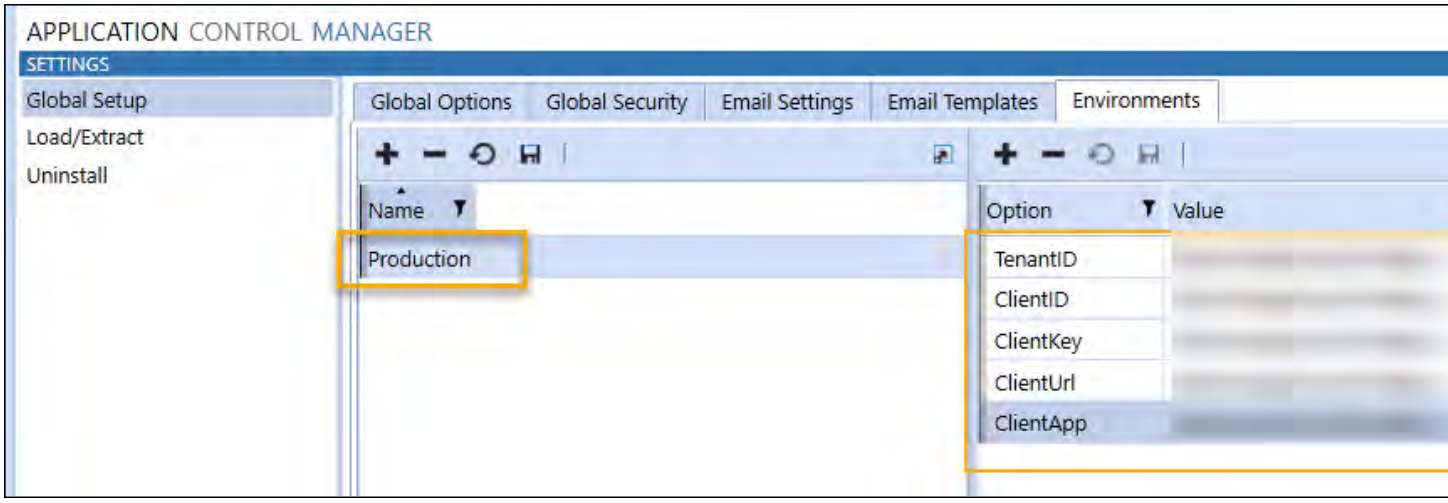
- Prepare metadata on remote (source system)
    - Using the REST API that was configured in the Application Control Manager system administration screen, the system remotely executes a Data Management setup on the source system named Application Control Manager Metadata Migration (ACM) -> Prepare Metadata.
    - 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's 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.

Request Migration

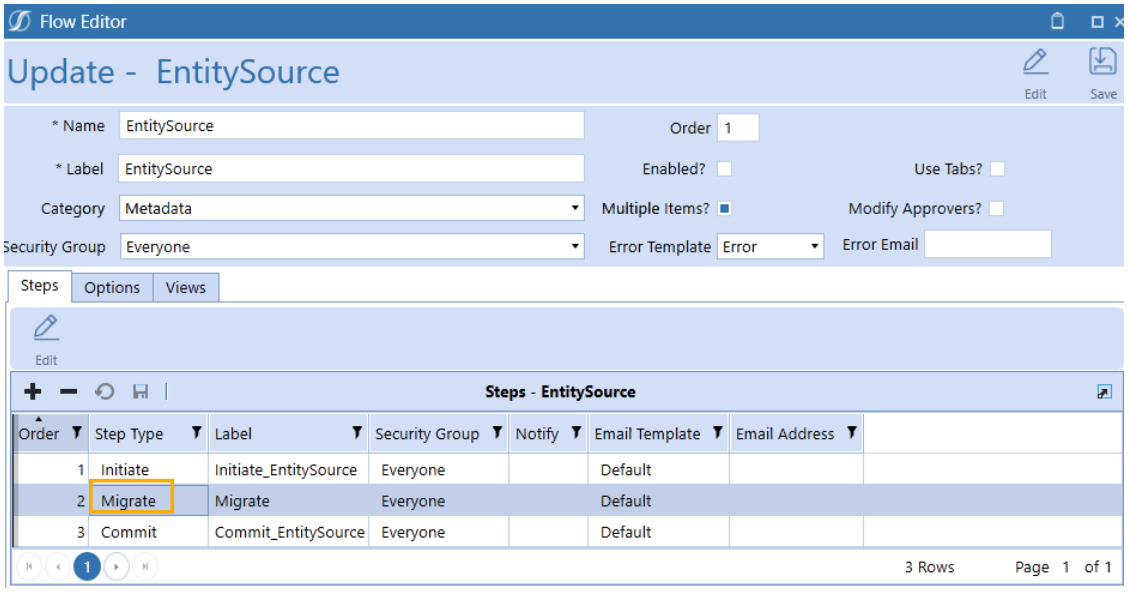
Initial Setup and Configuration

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.

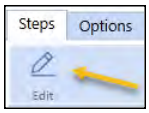
Before continuing, follow the setup steps outlined in the Metadata Synchronization section above. You must set up a destination environment where requests will be sent.



Add a new step to any flow you have configured in the system. In the Application Control Manager administration screen, select Flows and edit or create a flow to use for the migration. Add a new step to the flow after the Initiate step and select “Migrate”.

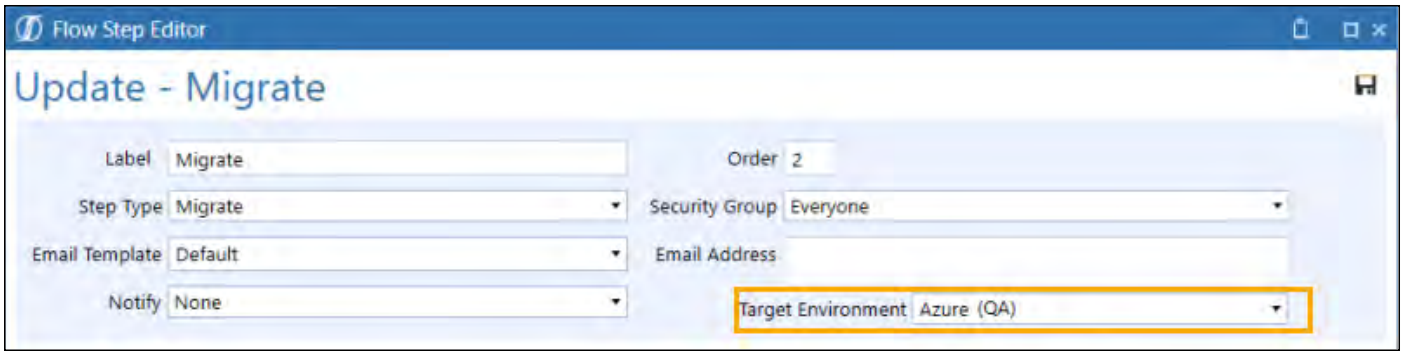


Click Edit:

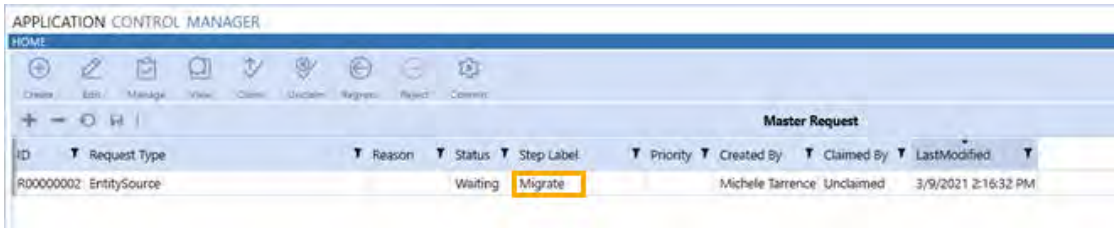


Specify the destination system where you want to commit the request. This was defined in the prior configuration step.

Select the 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 to be “migrate”:



When you manage this request and advance to the next step, the system automatically connects to the target environment’s 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 normally would.

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_PV6.3.0_SV100_PackageContents.zip

Identifier	Description
ACM	Solution ID
PV6.3.0	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.

See also:*Managing a OneStream Environment* in the *OneStream XF Design and Reference Guide*.

1. In the Production OneStream application, install the solution and create the data tables. See Configure the OneStream Application Server 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 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.