Administering Actor Workspace (AWS)

This guide describes the necessary steps to setup and administer the Actor Workspace Solution.

Actor Workspace Overview

The Actor Workspace *(AWS)* Solution is a collection of predefined Dashboards that delivers custom content for different user types which include the Executive, Controller, and Administrator within an organization.

Actor Workspace Components

Actor Workspace contains three main actor home screens including Administrator, Controller, and Executive. Each of these contain different content focused on specific roles, duties, and activities.

Administrator Workspace
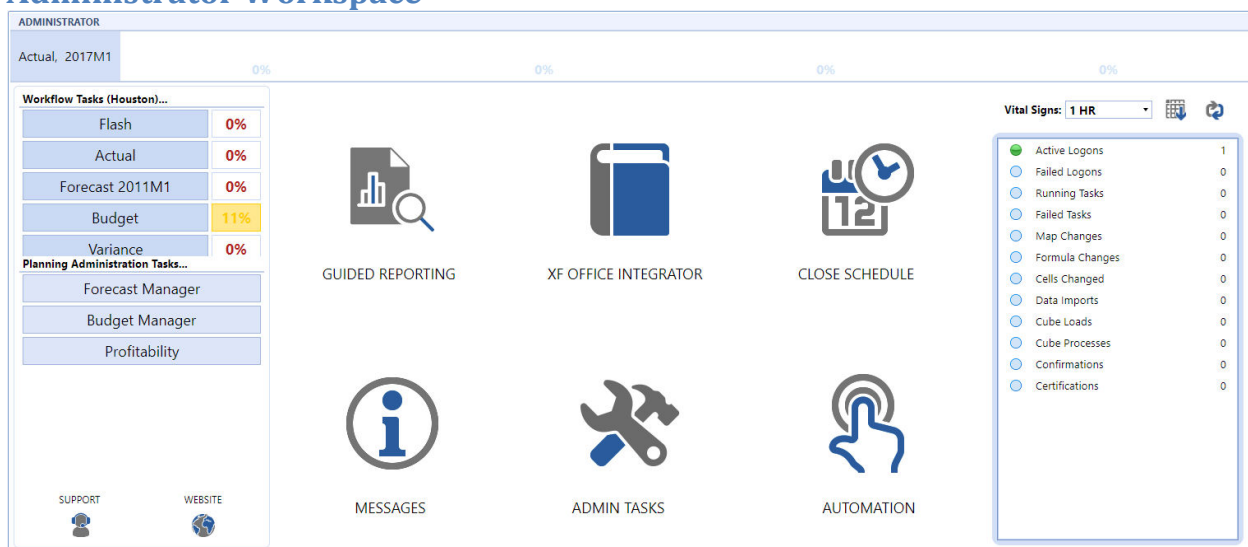
The Administrator Workspace displays Workflow and Calculation Status for multiple Business Units, vital sign details for the current application, enables launching to the users default Workflow Profile for multiple Scenarios, and it allows the administrator to launch tools such as Guided Reporting, Close Schedule and Automation.

Controller Workspace
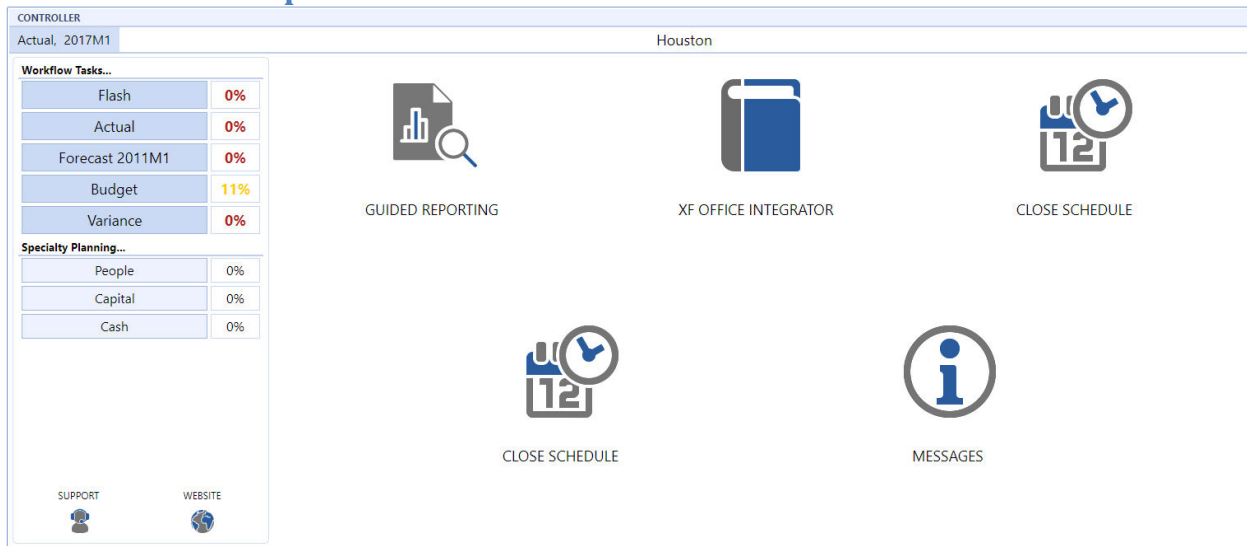
The Controller Workspace displays an icon which launches the close schedule for the current period, the default Workflow status for multiple Scenarios, and the current system notes. This Workspace also allows the controller to launch analysis tools such as Guided Reporting and Excel templates.

Executive Workspace
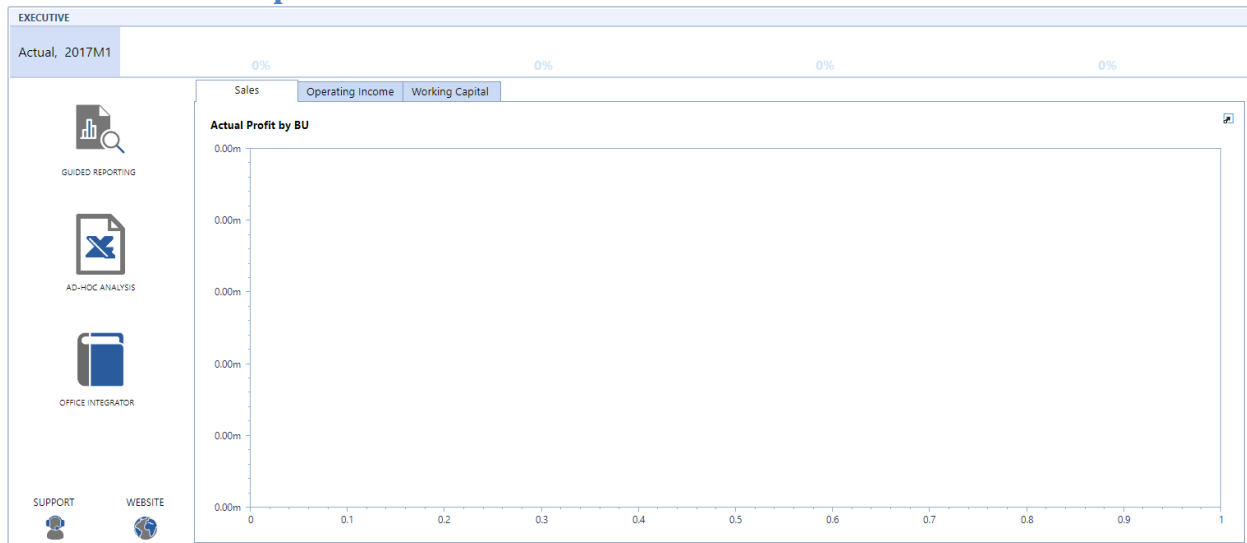
The Executive Workspace displays the default Workflow status for four different Scenarios and customizable flash charts. This Workspace also allows the executive to launch analysis tools such as Guided Reporting and Excel templates.

Actor Workspace Setup
Setting up Actor Workspace is broken into five main steps.

Import Actor Workspace Package
The Actor Workspace package is a zip containing the Actor Workspace application files and is located in the OneStream XF MarketPlace. To add the Actor Workspace, log into XF, open the Application Load/Extract screen, and import the zip file.

Note: The Actor Workspace *(AWS)* Solution integrates content from Close Manager *(CMR),* Help Desk *(HDK)* and Guided Reporting *(GRT)* Solutions which are also available in the OneStream XF MarketPlace. These Solutions MUST be installed in order for the AWS to operate correctly.

Actor Workspace Settings
Parameter settings for the XFW Actor Workspace *(AWS)* are set from the Actor Workspace Settings screen. These settings drive the content for Calculation and Workflow Status. Launch the Settings from the OnePlace dashboard link.

Global Options
Global Options include general settings for running the Actor Workspace

Cube Name
Enter the default Cube name

Corporate Website
Enter the web address for the company's corporate website *(if applicable)*

Budget Year
Enter the current Budget Scenario reporting year

Workflow Selection
Workflows that drive calculation status displayed on the Executive and Administration home pages.

Workflow 1
Enter the first Workflow to display

Workflow 1 Entity
Enter the Entity name / Description associated with Workflow 1

Workflow 2
Enter the second Workflow to display

Workflow 2 Entity
Enter the Entity name / Description associated with Workflow 2

Workflow 3
Enter the third Workflow to display

Workflow 3 Entity
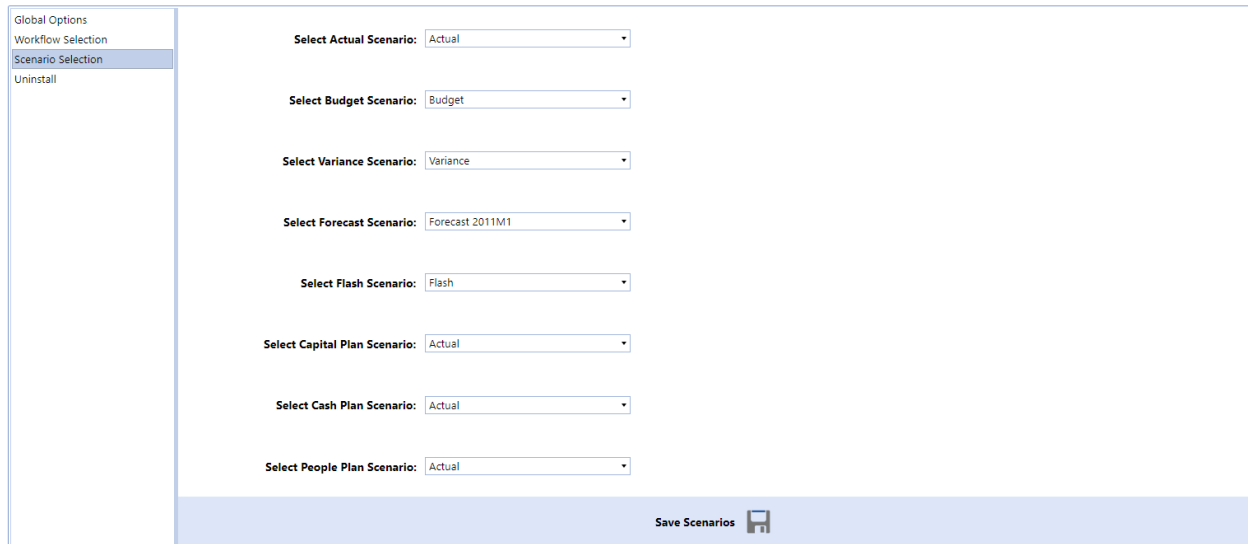Enter the Entity name / Description associated with Workflow 3

Workflow 4
Enter the fourth Workflow to display

Workflow 4 Entity
Enter the Entity name / Description associated with Workflow 4

Scenario Selection
Scenarios that drive Workflow Tasks on the Administrator and Controller home pages.

Actual Scenario
Enter the name of the Actual Scenario

Budget Scenario
Enter the name of the Budget Scenario *(if applicable)*

Variance Scenario
Enter the name of the Variance Scenario *(if applicable)*

Forecast Scenario
Enter the name of the Forecast Scenario *(if applicable)*

Flash Scenario
Enter the name of the Flash Scenario *(if applicable)*

Capital Plan Scenario
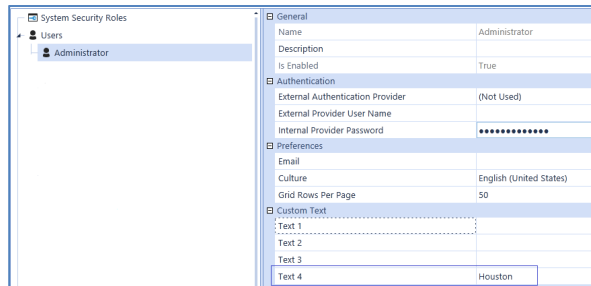Enter the name of the Capital Plan Scenario *(if applicable)*

Cash Plan Scenario
Enter the name of the Cash Plan Scenario *(if applicable)*

People Plan Scenario
Enter the name of the People Plan Scenario *(if applicable)*

Set Users Default Workflow

Setting the default Workflow for a user allows the Actor Workspaces to open a specified Workflow. To setup a default Workflow for a user, navigate to the user under Security and enter the name of the Workflow in the *Text 4* field. This value needs to be entered for users with the Controller and Administrator View Dashboards.


Setup Automation Tasks

The Automation button on the Administrator View Actor Workspace launches an Automation interface. This screen allows administrators to run Data Management Sequences from the Actor Workspace Dashboards, however Actor Workspace *(AWS)* does not install any Data Management Sequences. To enable these buttons, Data Management Sequences need to be created in the XF Data Management screen and then assigned to the buttons for this Dashboard.

Once the sequences have been defined, they can be linked to the automation buttons.
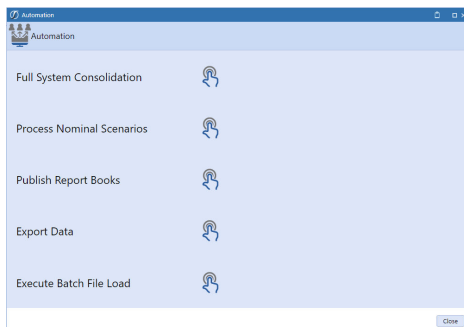
To set these links, update the following Parameter Components:

- btn_FullConsolidation_AWSe1
- btn_NominalizeScenarios_AWSe1
- btn_PublishReports_AWSe1
- btn_ExportData_AWSe1
- btn_ExecuteBatchLoad_AWSe1

Update the *Selection Changed Server Task Arguments* with the name of the Data Management Sequence called by each button.

Component Properties	
General (Component)	
Name	btn_FullConsolidation_AWS
Description	
Maintenance Unit	XFT Actor Workspaces (AWS)
Component Type	Image Button
Formatting	
Text	
Tool Tip	Full System Consolidation
Display Format	BackgroundColor = Transparent, BorderThickness =
Image Button	
File Source Type	Dashboard File
Url Or Full File Name	NavAutomationTask_AWS.png
Action	
Bound Parameter	
Parameter Value For Button Click	
Apply Selected Value To Current Dashboard	True
POV Action	
Selection Changed POV Action	No Action
Selection Changed POV Arguments	
Server Task	
Selection Changed Server Task	Execute Data Management Sequence
Selection Changed Server Task Arguments	{Full Consolidation}{}

Setup the Cube Views Used in Actor Workspace

In XF, select the Application tab and navigate to Cube Views. Actor Workspace Cube Views are located under XFT Workspace Executive *(AWS)* and XFT Workspace General *(AWS).* The Cube Views listed below need to be updated with the correct POV, the correct Entities under the Rows tab, and Accounts under the Columns tab.

Cube Views Executive

The Executive Cube Views need to be updated with the appropriate POV and account list in order to correctly integrate with the host application. These Cube Views drive the charts shown on the Executive home page.

- **ActualProfitByBU_Exec_AWSe1**
  Displays profit by Business Unit where the Business Unit information is pulled from variables *(BU1Name_AWSe1 - BU3Name_AWSe1)*
- **ActualSalesByBU_Exec_AWSe1**
  Displays sales by Business Unit where the Business Unit information is pulled from variables *(BU1Name_AWSe1 - BU3Name_AWSe1)*
- **ActualWorkingCapital_Exec_AWSe1**
  Displays Working Capital by Business Unit where the Business Unit information is pulled from variables *(BU1Name_AWSe1 - BU3Name_AWSe1)*

Cube Views General

The General Cube Views need to be updated with the appropriate POV to correctly integrate with the host application. These Cube Views drive the status reports and indicators shown on the Executive and Administrator home pages.

- **CSActual_Gen_AWSe1**
  Used to drive the Calculation Status report
- **CSActualForStateIndicator_Gen_AWSe1**
  Used to drive the Calculation Status indicators

Uninstall

The uninstall screen enables the removal of the Actor Workspace application.
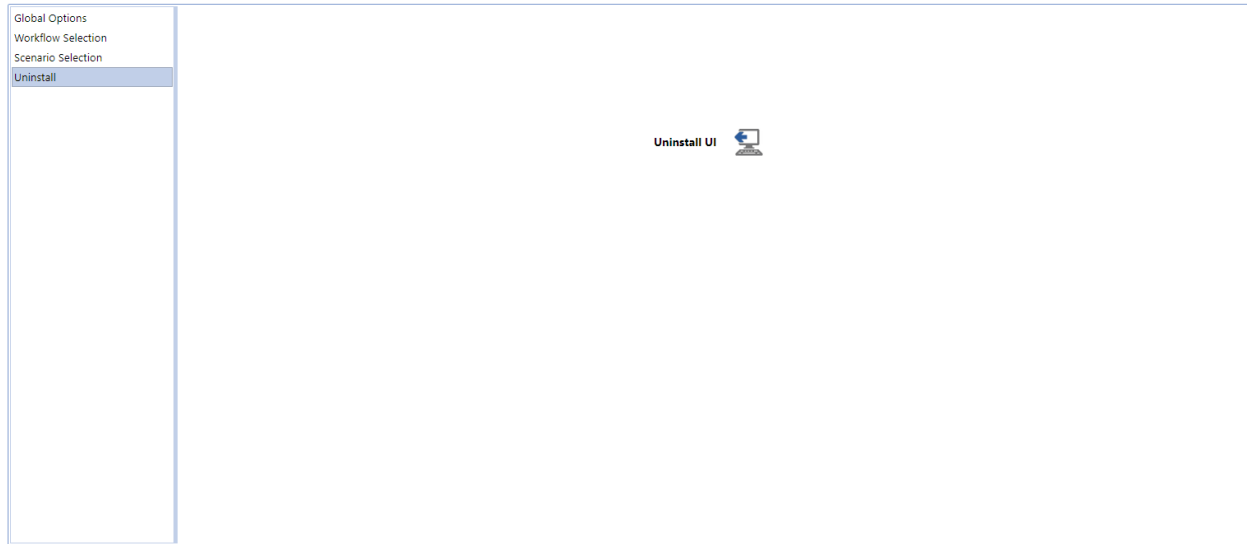
Uninstall UI

The Uninstall UI button opens a dialog to confirm removal of the Actor Workspace solution UI.

Modifying MarketPlace Solutions

A few cautions and disclaimers when modifying a MarketPlace Solution:

- 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.