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This guide describes the necessary steps to setup and use the Help Desk (HDK) Solution.

Help Desk (HDK) Overview

The Help Desk (HDK) Solution is used to provide business users with a framework for managing user issues and requests within a company by implementing a simple ticket-based support desk for use within OneStream.

Help Desk Setup

Setting up the Help Desk Solution is broken into the following steps.

Prerequisite: Considerations for Location of HDK Development Work

There are two schools of thought for where to do buildout of your Help Desk Solution:

1. Build in a Production OneStream XF application.
2. Build in a separate Development OneStream XF application.

Below are considerations for each approach:

When Doing HDK Build in a Production OneStream XF Application

There are no significant advantages to building your first HDK solution in your Production application environment since the solution is useful in all environments. The only application specific Metadata for HDK is the Ticket Categories. These are easy to setup and it is recommended that the process be done in each application due to the low volume of work verses the added risk of migrating database tables between applications for this low level of administration effort.

When Doing HDK Build in a Development OneStream XF Application

A Development OneStream XF application is the safest method for building out your HDK solution. It is always recommended to test and configure new MarketPlace solutions like HDK in a Development instance with the latest copy of the Production OneStream XF application. It is recommended that Administrators learn the tool and document their HDK processes in a Development environment rather than generate test tickets in their Production environment. There typically would not be a need to migrate HDK ticket information between Development and Production environments and the only unique setup component is the creation of the Ticket Categories for HDK. This creation of the Ticket Categories is a low level of effort that does not warrant migrating the HDK tables between applications.

See the chapter on *Solution Database Migration Advice* for more details.

Database Server Connections Settings

Changes need to be made to the *OneStream XF Application Server Configuration* in order for users to create and change data in the additional database tables used by this solution.

To edit these settings:

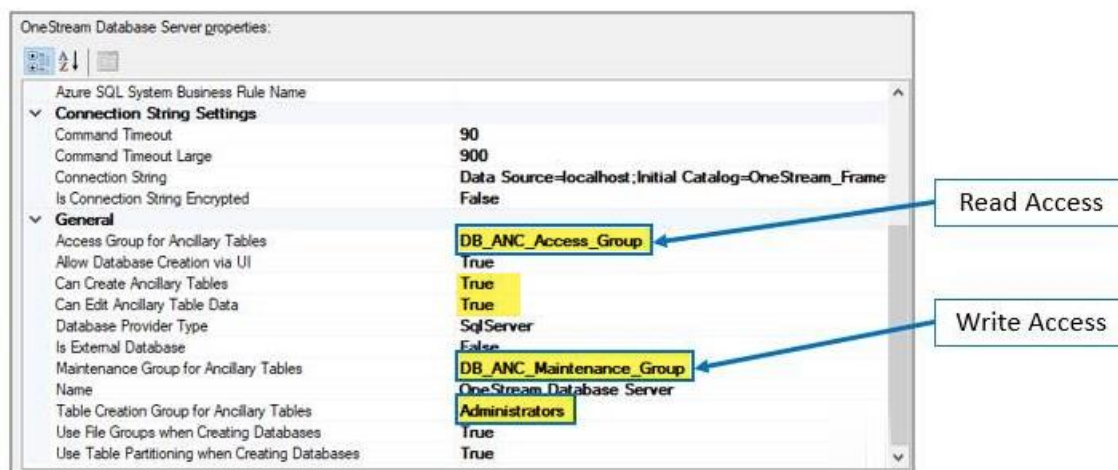
1. Start *OneStream XF Server Configuration Utility* as an Administrator.
2. Select *Open Application Server Configuration File*.
3. Select Database

Note: If other MarketPlace Solutions such as Specialty Planning are already in the application, these setting might already be in place.

If a change is necessary, Internet Information Server must be restarted.

Make the following changes:

- *Access Group for Ancillary Tables* should be a group that includes those that will read the records.
- *Maintenance Group for Ancillary Tables* should include an edit and maintain the tables. This is typically set to Administrators or a group that contains a limited number of users.
- *Table Creation Group for Ancillary Tables* should be a group who will create the tables. This is typically set to Administrators.
- Other settings highlighted need to be set as noted below in order to execute table creation via the User Management Console Dashboards.



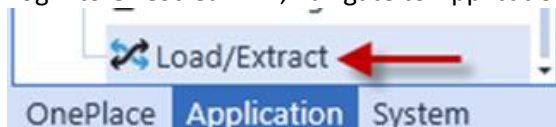
Ensure these security group settings include the people who will be working on and setting up HDK tables.


How to Install HDK

First, check the related *Release Notes* to determine if an Uninstall of the User Interface or a Full Uninstall is necessary and then see that chapter for instructions. If the *Release Notes* say that an overinstall is allowed, then proceed with these instructions from here:

Download the Help Desk Solution from the XF MarketPlace. The package is a zip file named *HDK_PVxxx_SVzzz_PackageContents.zip* where xxx and zzz represent version numbers for OneStream XF and the solution. The PVxxx number (e.g. 440) represents the minimum XF Platform Version (e.g. 4.4.0) required in order to implement this Solution Version (i.e. SVxxx).

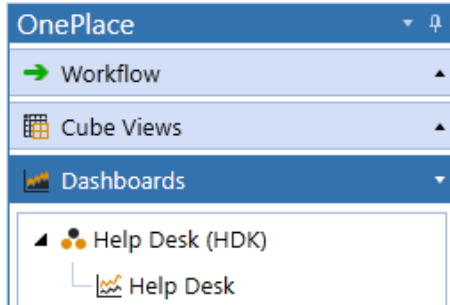
Log into OneStream XF, navigate to Application Tab | Tools | Load/Extract.



Click *Select File*, navigate to the zip file, and click *Load* .

Create Help Desk Tables

- 1.) Go to OnePlace | Dashboards and select the *XFW Help Desk (HDK)* Dashboard.



The first time this solution is run, it will be directed to the Help Desk Setup screen.

Note: Prior to running the setup, ensure that the account being used to access SQL server has table creation rights on the SQL database to create the custom tables.

The first step of the setup creates all of the tables required for the Help Desk Solution.

- 2.) Select Step 1: Setup Tables

This step may be necessary when upgrading even if tables are already present. Click the button if prompted. Help Desk will not drop any tables that already exist but will modify table structures and add any new ones if necessary.

Step 1:



Setup Tables

Note: These tables are now created in the OneStream application database:



Once the setup is complete, the Help Desk Status screen will open upon clicking the Help Desk *Launch Solution* button.

Step 2:



Launch Solution

Package Contents

It is not recommended to rename any included Dashboard, dimension, member, etc. unless specified.

Dashboard Maintenance Unit

HDK_HelperQueries

This is a Dashboard Data Set Business Rule. This rule provides helper queries for report listings, drill queries and reporting statistics that are used to create the Dashboards and provide reporting functionality.

HDK_SolutionHelper

This is a Dashboard Extender Business Rule that provides various helper functions for the HDK solution. These helper functions include management of the solution setup, configuration settings, Email, Ticket Editor, and management of ticket attachments.

HDK_ParamHelper

This is a Conditional Parameter helper functions XFBR String Business Rule. This rule is used to provide conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

Database Tables

XFW_HDK_ControlLists

This database table stores the Global Options settings for the Help Desk solution.

XFW_HDK_SupportTickets

This database table stores the HDK Ticket information.

XFW_HDK_TicketAttachments

This database table stores the Ticket Attachment information.

XFW_HDK_TicketCategories

This database table stores the information for the Ticket Categories created by Administrators for Ticket reporting and analysis.

Settings - ⚙️

The Settings screen contains all of the setup options for the OneStream Help Desk Solution.

The screenshot displays the 'HELP DESK SETTINGS' configuration interface. On the left, a sidebar menu includes 'Global Options', 'Categories', and 'Uninstall'. The main content area contains the following settings:

- Security Role [Manage Tickets Access Group]:** HDK_Admins
- Default Ticket Owner:** HDK_Admin
- Enable Email Notifications:**
- Email Connection:** OneStreamEmail
- Email Distribution Group:** HDK_Admins
- Default Email Title:** New Support Ticket
- Default Email Message:** A new support ticket has been entered that needs review.
- Default Email Priority:** High

A 'Save' button is located at the bottom right of the settings area. The bottom navigation bar shows 'Dashboard - Help' and 'New'.

Global Options

Security Role [Manage Ticket Security Access]

The security group that can access the Manage Tickets and Settings pages.

Default Ticket Owner

The default user assigned as the owner of new tickets. The list of available users is determined by the security group assigned to the Manage Ticket Security Access setting.

Enable Email Notification

On/Off flag to turn on email generation when tickets are added/updated by users. This switch also adds



the Status button - Status to the Support Tickets Dashboard to allow users to send an email request for a status update of a selected ticket to the users in the Email Distribution Group. When *Enable Email Notification* is activated, HDK will send an Email notification to Ticket creators when their Tickets are moved to Closed Status.

Email Connection

Select an email connection from the dropdown list. The Email Connections were configured in the OneStream Application Server configuration and contain all of the necessary setup information for the local email provider including the sending email address, server credentials, host, port, etc. The email connections list is pulled from the Database Server Connections list in the Application Server configuration.

For more details on email database connections, see the *OneStream XF Installation and Configuration Guide*.

Note: See *Appendix 1* at the end of that document for information on setting up OneStream encrypted email connections.

Email Distribution Group

User group that contains the users who will receive the email notifications on new Help Desk tickets. Each user in the user group that has an email address assigned in security will be included in the distribution.

Default Email Title

The email title displayed in the new ticket email notifications.

Default Email Message

The email message included in the new ticket email notifications.

Default Email Priority

Ticket priority level required to cause new Ticket email notifications to be sent. If set to High, then only new tickets that have a Priority of High will cause an email to be sent. If set to Medium, then tickets set to Medium & High will cause an email to be sent.

After updating all of the settings, click the *Save Settings* button  in order to save all changes.

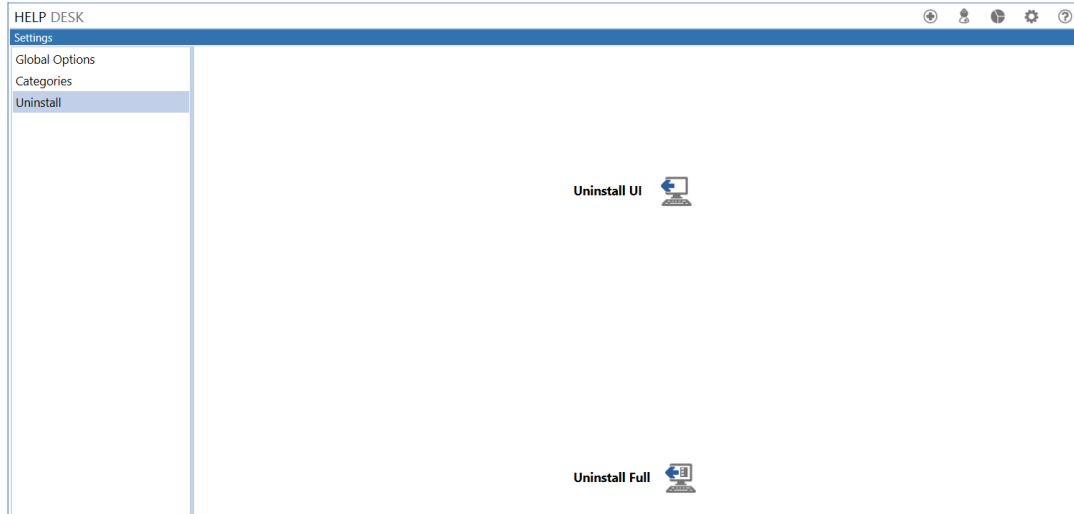
Note: If users have access to maintain packages/distributions, they must be included in the Access Group for Ancillary Tables (*application server setup screen*).

Categories

The Categories screen enables the addition of user defined Ticket Categories for enhanced reporting.

Uninstall

The uninstall screen enables the removal of the Help Desk application UI and custom tables.



Uninstall UI

The Uninstall UI button opens a dialog to confirm removal of the Help Desk solution UI.



Uninstall Full

The Uninstall Full button opens a dialog to confirm removal of the Help Desk solution UI and deletion of all Help Desk custom tables from SQL Server.



Help Desk Tickets

Submit -

Add enables users to enter support tickets to the Help Desk administrators for review and triage.



Note that the Status button - **Status** is only displayed when the Enable Email Notifications switch is turned on in the Global Options of the Settings page. Selecting a ticket and clicking the Status button will send an email, requesting an update on the status of the ticket, to the users in the Email Distribution Group specified in the Global Options.

HELP DESK							
SUBMIT TICKETS							
Tickets for Admin							
Drag a column header and drop it here to group by that column							
Open Time (UTC)	Status	Priority	Category	Issue	Resolution	Closed Time (UTC)	
10/25/2018 1:29:32 PM	Open	High	Enhancement Request	For next year's forecast process, would like to have future periods seeded via revised regression calc.		1/1/1900 12:00:00 AM	
7/2/2019 7:29:21 PM	Open	Medium	Security Request	Create new users for forecast.		1/1/1900 12:00:00 AM	

The Ticket Editor Screen is used to create new tickets. Users can add attachments to their tickets to provide additional information for the ticket. The attachments can be downloaded and reviewed by the support team when managing the ticket.

1 Ticket Info

Priority

Category

2 Ticket Attachments

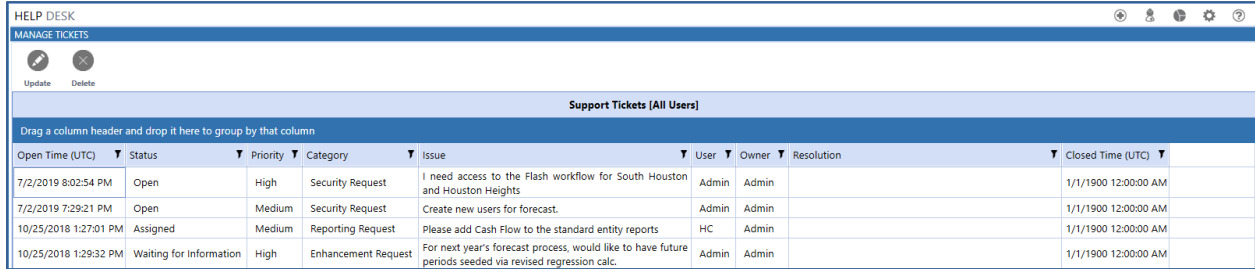
Attach
 Remove
 Download

File Name	User	Time Stamp (UTC)

Save
Cancel

Manage -

The Manage Tickets Screen allows administrators to triage open support tickets by assigning an owner to respond to the ticket, changing ticket priority, and updating the status of tickets. Note that the ticket Closed Time is initially populated with the time stamp set to 1/1/1900 12:00:00 AM.



HELP DESK
MANAGE TICKETS

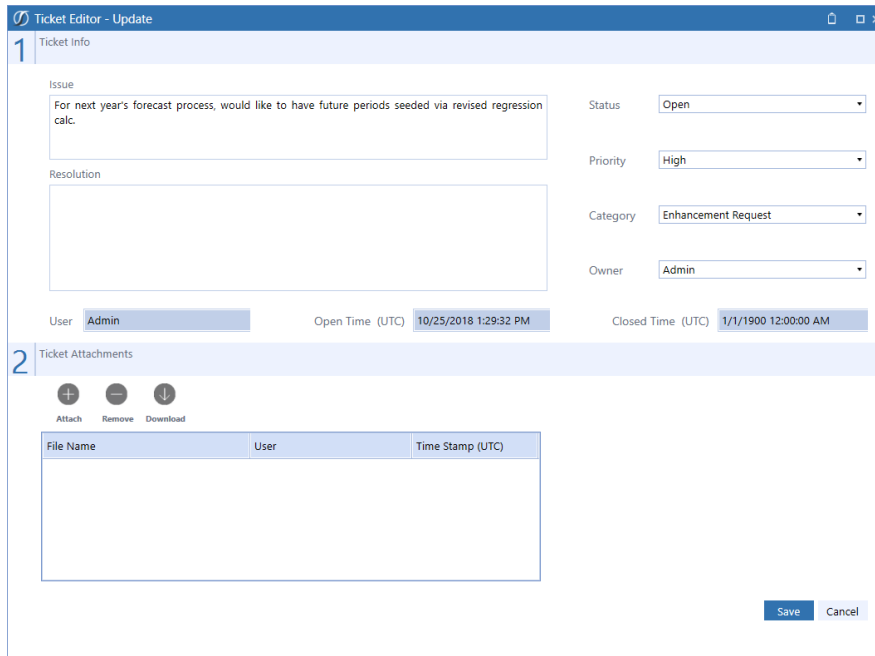
Update Delete

Support Tickets [All Users]

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

Open Time (UTC)	Status	Priority	Category	Issue	User	Owner	Resolution	Closed Time (UTC)
7/2/2019 8:02:54 PM	Open	High	Security Request	I need access to the Flash workflow for South Houston and Houston Heights	Admin	Admin		1/1/1900 12:00:00 AM
7/2/2019 7:29:21 PM	Open	Medium	Security Request	Create new users for forecast.	Admin	Admin		1/1/1900 12:00:00 AM
10/25/2018 1:27:01 PM	Assigned	Medium	Reporting Request	Please add Cash Flow to the standard entity reports	HC	Admin		1/1/1900 12:00:00 AM
10/25/2018 1:29:32 PM	Waiting for Information	High	Enhancement Request	For next year's forecast process, would like to have future periods seeded via revised regression calc.	Admin	Admin		1/1/1900 12:00:00 AM

The Ticket Editor – Update Screen has additional fields for administrators to manage the tickets by Priority, Category, Status and Owner. Attachments can also be added and downloaded from this screen.



Ticket Editor - Update

1 Ticket Info

Issue
For next year's forecast process, would like to have future periods seeded via revised regression calc.

Resolution

Status: Open

Priority: High

Category: Enhancement Request

Owner: Admin

User: Admin Open Time (UTC): 10/25/2018 1:29:32 PM Closed Time (UTC): 1/1/1900 12:00:00 AM

2 Ticket Attachments

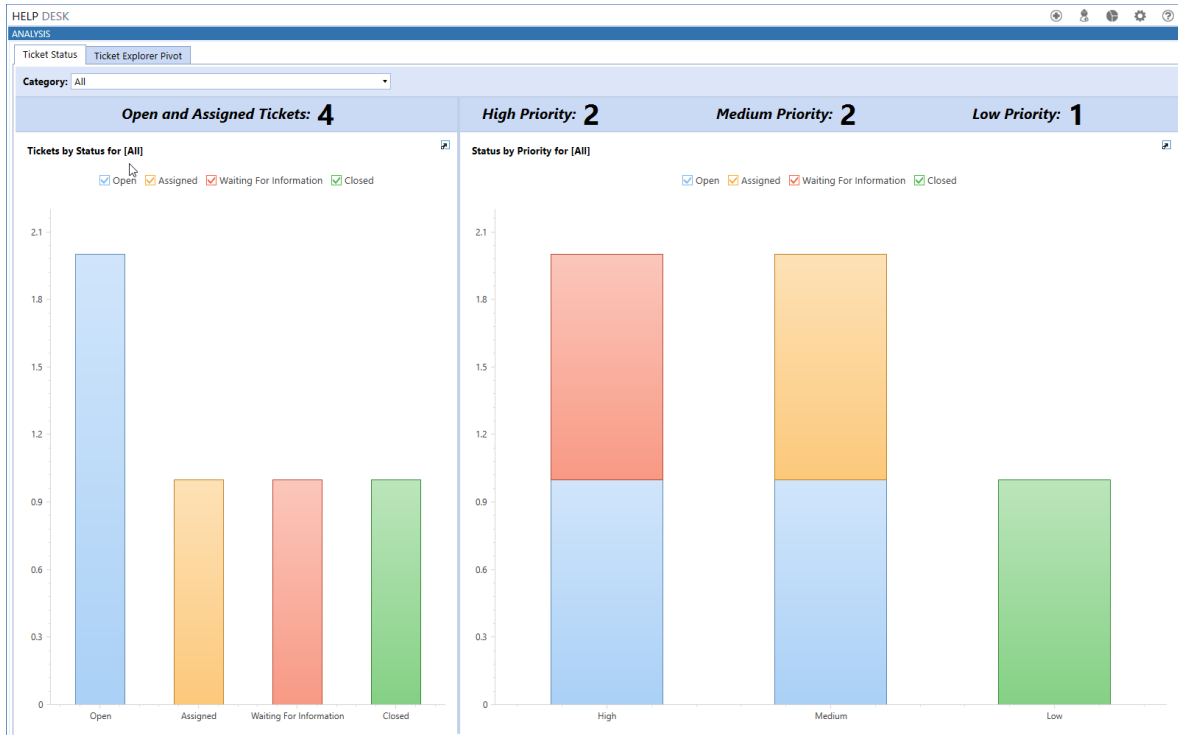
Attach Remove Download

File Name	User	Time Stamp (UTC)

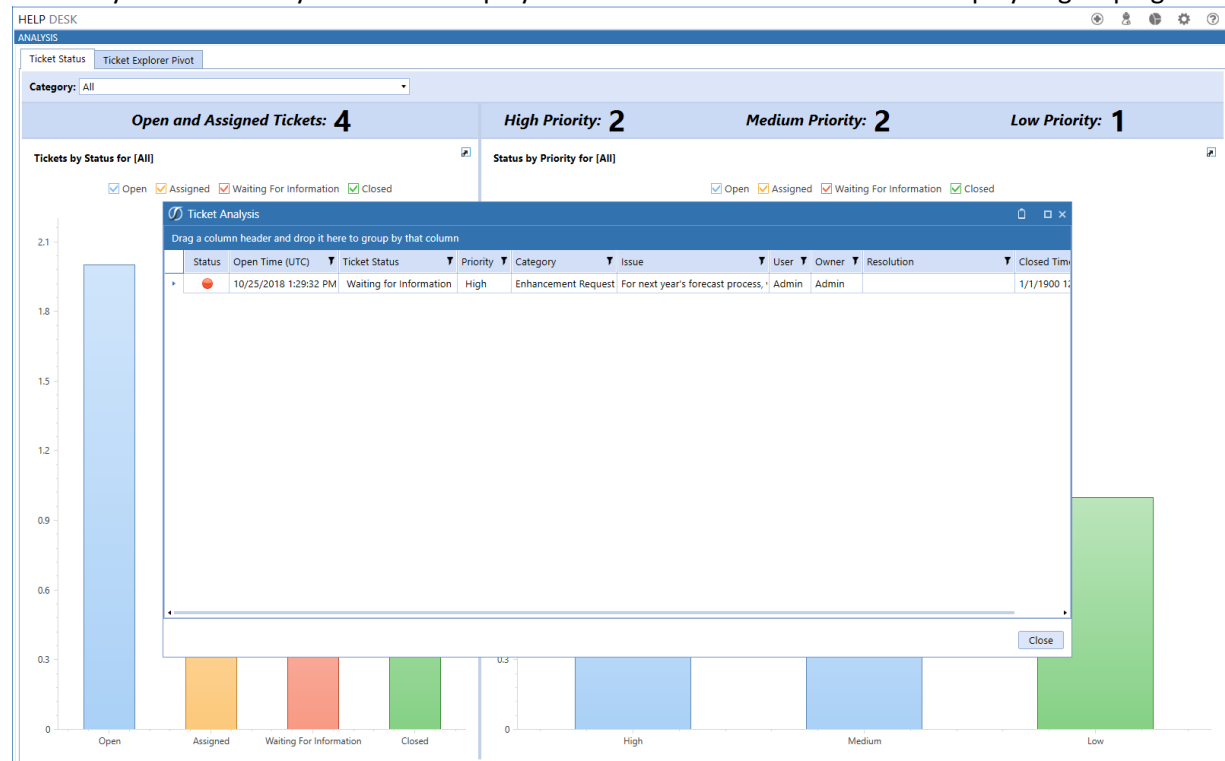
Save Cancel

Analysis -

Analysis allows users to view their opened and closed tickets and allows administrators to do so for all tickets using the Ticket Analysis Dashboard and Ticket Explorer Pivot Report.



The Analysis Chart is fully drillable to display the source tickets for each of the displayed grouping.



The Ticket Explorer Pivot report provides a filtered grid view to review ticket details.

HELP DESK

ANALYSIS

Ticket Status: Ticket Explorer Pivot

Status: All Priority: All Category: All Owner: All

Ticket Pivot

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

	Status	Open Time (UTC)	Ticket Status	Priority	Category	Issue	User	Owner	Resolution	Closed Time (UTC)
•	Open	7/2/2019 7:29:21 PM	Open	Medium	Security Request	Create new users for forecast.	Admin	Admin		1/1/1900 12:00:00 AM
•	Open	7/2/2019 8:02:54 PM	Open	High	Security Request	I need access to the Flash workflow for South Houston and Houston Heights	Admin	Admin		1/1/1900 12:00:00 AM
•	Assigned	10/25/2018 1:27:01 PM	Assigned	Medium	Reporting Request	Please add Cash Flow to the standard entity reports	HC	Admin		1/1/1900 12:00:00 AM
•	Waiting for information	10/25/2018 1:29:32 PM	Waiting for information	High	Enhancement Request	For next year's forecast process, would like to have future periods seeded via revised regression calc.	Admin	Admin		1/1/1900 12:00:00 AM
•	Closed	7/2/2019 8:06:27 PM	Closed	Low	Bug Report	Cannot add attachments.	Admin	Admin		7/2/2019 8:06:49 PM

Solution Database Migration Advice

A Development OneStream XF Application is the safest method for building out a solution with custom tables such as this one. Help Desk tickets typically tend to be unique to the application/environment that they are generated in, so there would not be a need to migrate the ticket information between applications/environments. Therefore, the recommended approach is a clean install in each application/environment that requires unique Help Desk ticket tracking.

Optimal Display Settings

OneStream XF and XF 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.

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.