STANDARD APPLICATION REPORTS SETUP INSTRUCTIONS

PV 610 SV 100

Contents

OVERVIEW

The Standard Application Reports solution is a set of predefined reports that can be imported into any OneStream application and used for basic application reporting. Examples include:

- Application Analysis
- Intercompany Matching
- Journal Detail
- Metadata Changes
- Transformation Rule Change
- Workflow Status

This solution is based on SQL-based data adapters and all the reports have been designed in OneStream Studio.

Setup & Installation

This section contains important details related to planning, configuring, and installing your solution. Before you install Standard Application Reports, familiarize yourself with these details.

See also: MarketPlace Solution Modification Considerations

Dependencies

Component	Description
OneStream XF 6.1.0 or later	Minimum OneStream platform version required to install this version of Standard Application Reports.

Select the Standard Application Reports Development Location

Before beginning installation, decide whether to build Standard Application Reports directly in the Production OneStream XF application or in a separate Development OneStream XF application. This section provides some key considerations for each option.

Production OneStream XF Application: The primary advantage of building Standard Application Reports in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity and not advised.

Note: OneStream strongly recommends that you implement Standard Application Reports in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream XF Application: As a best practice, use the Development OneStream XF application to build Standard Application Reports.

Create the OneStream XF Development Application

1. Ensure all the OneStream XF artifacts relating to Standard Application Reports such as **workflow profiles** and **entities** are in the Production application.
2. Copy your Production OneStream XF application to your Development environment and rename it. This Development version is used for your Standard Application Reports project.

Application Server Settings

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

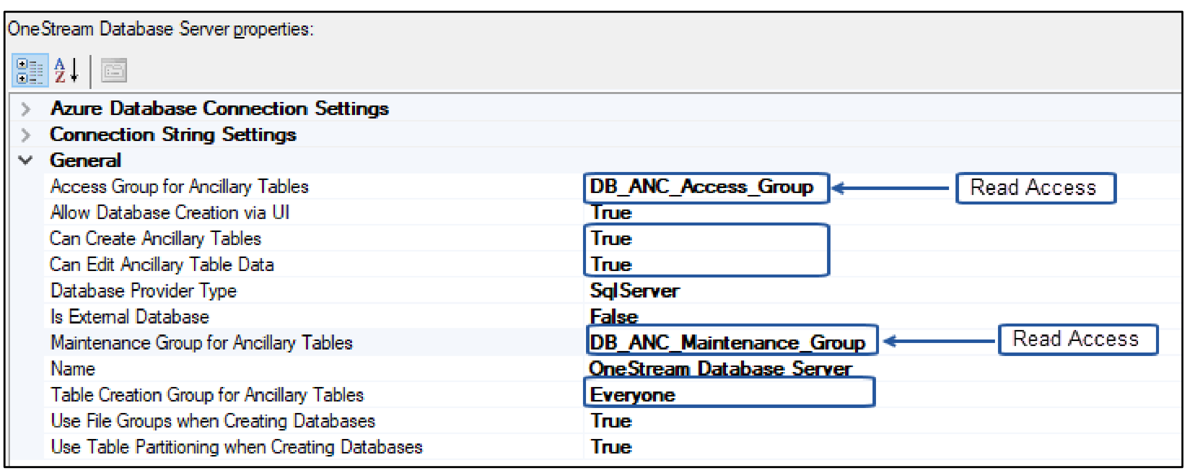
See also: Solution Database Migration Advice

Configure the OneStream XF Application Server

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

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

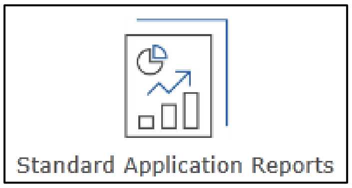
1. Start the OneStream XF Server Configuration utility as an Administrator.
2. Select **Open Application Server Configuration File** > **Database**
3. Edit the following **OneStream Database Server properties**:
   - **Access Group for Ancillary Tables:** Select a group that includes those who access records.
   - **Can Create Ancillary Tables:** True
   - **Can Edit Ancillary Table Data:** True
   - **Maintenance Group for Ancillary Tables:** Select a group who edits and maintains tables.
   - **Table Creation Group for Ancillary Tables:** Select a group who can create tables.



4. Restart Internet Information Server.

Install Standard Application Reports

1. On the OneStream XF MarketPlace Dashboard, click **MarketPlace** > **Standard Application Reports**.

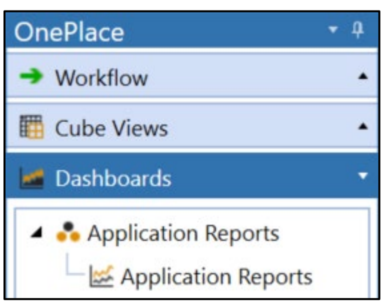


2. On the Standard Application Reports solution page, select the appropriate OneStream XF platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and click **Download**.
4. Log in to OneStream XF.
5. On the **Application** tab, click **Tools** > **Load/Extract**.
6. On the **Load** tab, locate the solution package using the **Select File** icons and click **Open**.
7. When the solution's file name displays, click **Load.**
8. Click **Close** to complete the installation.

Set Up Standard Application Reports

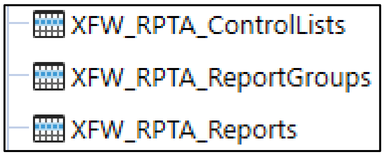
The first time you run Standard Application Reports, a guided table setup process begins.

- In OneStream XF, click **OnePlace** > **Dashboards > Application Reports** > **Application Reports**.



Create Tables

1. Click **Step 1: Create Tables.**
   This step may be necessary when upgrading even if tables are already present. Standard Application Reports does not drop any tables that already exist but modifies table structures and adds any new ones if necessary.

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

Package Contents

The Dashboard Maintenance unit provides the user interface for Standard Application Reports and includes the required dashboard groups, components, data adapters, parameters, and files.

The following business rules are included:

RPTA_HelperQueries
This is a dashboard dataset business rule. This rule provides various dashboard dataset helper functions to generate the reports for Standard Application Reports.

RPTA_SolutionHelper
This is a dashboard extender business rule that provides various helper functions for Standard Application Reports. These helper functions include management of the solution setup, configuration settings and management reporting details.

RPTA_ParamHelper
This is an XFBR String business rule with conditional parameter helper and security access functions for Standard Application Reports.

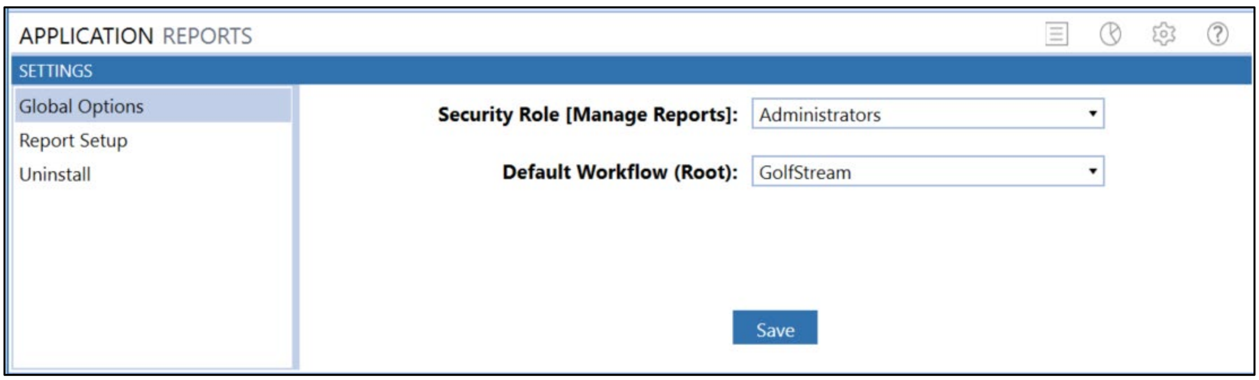
SETTINGS

The **Settings** pages contain key properties that guide administration including global options, report setup, and uninstall options.

Global Options

The **Global Options** page contains settings to guide global Standard Application Reports administration. It should be the first page accessed during Standard Application Reports setup and configuration.

Note: All global option settings are retained during solution upgrades.



Security Role (Manage Reports)

Since security is governed at the global level, it is the assignment of the user group to the security role that determines the global Standard Application Reports Administrators.

Default Workflow (Root)

Sets the default application root workflow for the solution reporting Point of View (POV).

Report Setup

Use the **Report Setup** page in the Application Reports Settings to:

- Set security access by user role for both report groups and individual application reports.
- Set the order in which report groups and their respective reports display in the Report Groups and Reports panes of the **Report Viewer** page.

  See also: Report Viewer Page.

- Customize Report Overview descriptions.

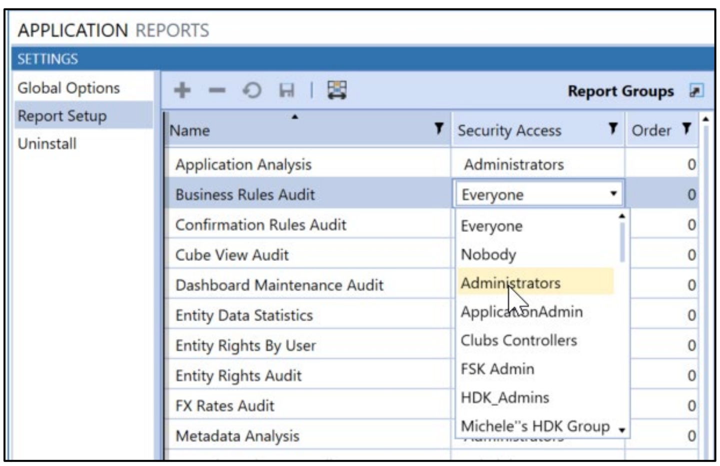
Set Security Access for Report Groups and Reports

You can use the **Report Setup** page to manage who has access to specific report groups and individual reports within report groups. Use the Report Groups pane to set security access for report groups. Use the Reports pane to set security access for reports in the currently selected report group. If a user does not have security access to a report group, they do not see that report group or its reports in the Report Groups or Reports panes of the **Report Viewer** page.

See also: Report Viewer Page.

To set security access for report groups or individual reports:

1. In the Report Groups pane of the **Report Setup** page, click to select a report group. This loads information for the group's reports in the Reports pane.
2. Click the row of the report group or report whose security access you want to change, then click in the Security Access column to enable the Security Access drop-down.
3. Select a security access group from the list, as shown in the following.



4. Click **Save** in the Report Group button bar to save your changes.

Report groups and associated reports display to users based on these security access settings.

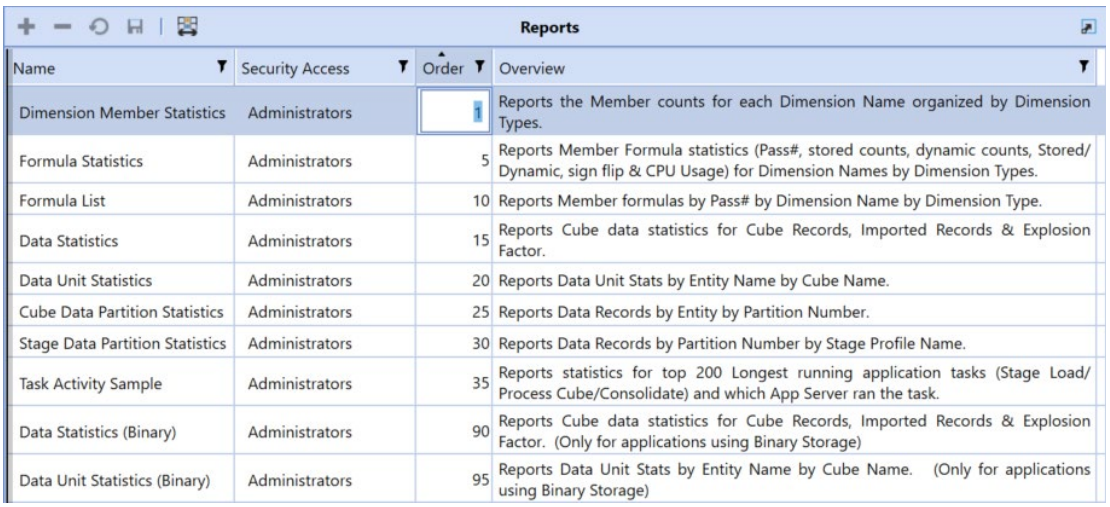
> **Note**: Report level security does not override report group level security. If a user has access to a report but not its report group, neither the report nor report group is visible.

Set Reports Groups and Reports Display Order

You can also use the **Report Setup** page to manage the display order of report groups and reports in the main Standard Application Reports dashboard. This is done by modifying ranking entries in the **Order** field for the report groups and reports and saving the changes. The lower the number, the higher the sequential display ranking, starting with zero. If a display order is not set, report groups and reports display in alphabetical order.

To set display order for report groups or individual reports:

1. In the Report Groups pane of the **Report Setup** page, click to select a report group. This loads information for the group's reports in the **Reports** pane.
2. Click the row of the report group or report whose order you want to set, then click in the **Order** column to highlight the current order value for editing.
3. Enter a number to set the sequential ordering of the report group or report within the report group or report order. For example, the following shows a report given an order of 1, which is the lowest order number for all the reports in the group, so it would appear first in the report display order.



Reports

Name	Security Access	Order	Overview
Dimension Member Statistics	Administrators	1	Reports the Member counts for each Dimension Name organized by Dimension Types.
Formula Statistics	Administrators	5	Reports Member Formula statistics (Pass#, stored counts, dynamic counts, Stored/ Dynamic, sign flip & CPU Usage) for Dimension Names by Dimension Types.
Formula List	Administrators	10	Reports Member formulas by Pass# by Dimension Name by Dimension Type.
Data Statistics	Administrators	15	Reports Cube data statistics for Cube Records, Imported Records & Explosion Factor.
Data Unit Statistics	Administrators	20	Reports Data Unit Stats by Entity Name by Cube Name.
Cube Data Partition Statistics	Administrators	25	Reports Data Records by Entity by Partition Number.
Stage Data Partition Statistics	Administrators	30	Reports Data Records by Partition Number by Stage Profile Name.
Task Activity Sample	Administrators	35	Reports statistics for top 200 Longest running application tasks (Stage Load/ Process Cube/Consolidate) and which App Server ran the task.
Data Statistics (Binary)	Administrators	90	Reports Cube data statistics for Cube Records, Imported Records & Explosion Factor. (Only for applications using Binary Storage)
Data Unit Statistics (Binary)	Administrators	95	Reports Data Unit Stats by Entity Name by Cube Name. (Only for applications using Binary Storage)

5. Click **Save** in the Reports button bar to save your changes.

Customize Report Overview Descriptions

You can also use the **Report Setup** page to manage the report descriptions in the Overview field of the Reports pane. To do this, click the overview description you want to change, then double-click in the cell to edit the description. After editing the description, click **Save** to update the report description.

Report Groups and Reports Panes Button Bar

Insert Row
This button is disabled for Standard Application Reports.

Delete Row
This button is disabled for Standard Application Reports.

Cancel
Removes changes made to the report groups or reports since the last save.

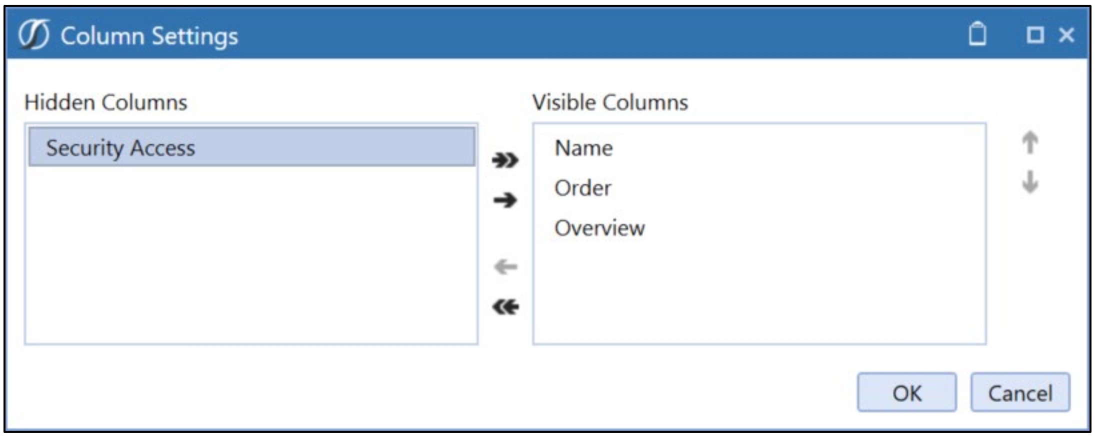
Save
Save changes to report group(s) or reports.

Column Settings
This lets you select the columns to display in the Report Groups and Reports panes of the **Report Setup** page.

See also: Hide and Show Columns

Show and Hide Columns

Click **Column Settings** to specify the columns in the grid that you want to view.



Select column names in either the **Visible Columns** list or the **Hidden Columns** list and use the left-to-right and right-to-left arrows to move the selected columns from one list to the other. You can hold down the SHIFT key to select multiple sequential columns, or you can hold down the CTRL key and select multiple non-sequential columns.

Use the **Add All Items** or **Remove All Items** arrows to move all columns from one list to the other.

The **Visible Columns** list shows the order in which columns display. To reorder a column in the display, select the heading name from the **Visible Columns** list, then use the **Move Up** and **Move Down** buttons to set where the selected column displays.

Uninstall

The Uninstall feature allows the Standard Application Reports user interface or the entire solution to be uninstalled. If done as part of an upgrade, any modifications performed on Standard Application Reports objects are removed. There are two uninstall options:

1. **Uninstall UI** removes Standard Application Reports, including related dashboards and business rules but leaves the database and related tables in place. For some releases, this step should be performed before accepting any new version of Standard Application Reports since some of the dashboards or other objects may have been modified.

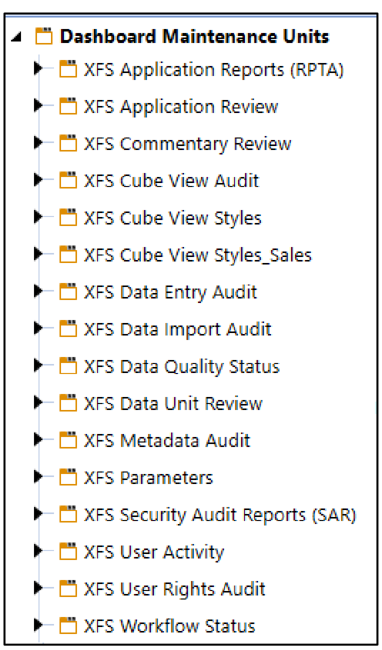
    - **Choose this option** if you want to accept a Standard Application Reports update without removing the data tables.
    - The Standard Application Reports Release Notes indicate if an overinstall is supported.
2. **Uninstall Full** removes all the related data tables, all data, Standard Application Reports dashboards, and business rules.
    - **Choose this option** to completely remove Standard Application Reports or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

Warning: Uninstall procedures are irreversible.

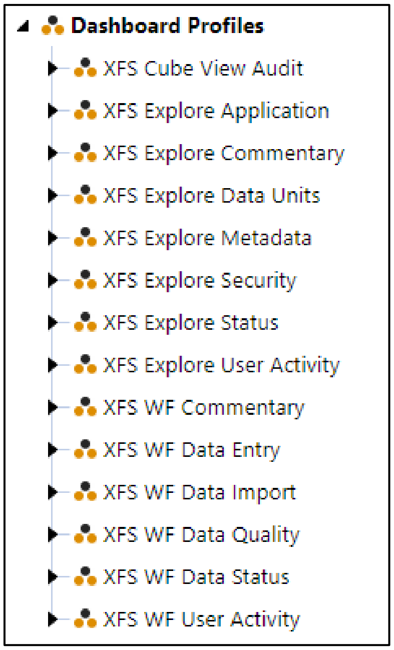
Uninstalling PV430 SV103 or Earlier Versions

To uninstall releases prior to PV440 SV100 of Standard Application Reports**:**

1. In OneStream XL. click **Application > Load/Extract**.
2. To backup existing application dashboards, click the **Extract** tab.
3. In the **File Type** drop-down, select **Application Dashboards**, then click **Extract**.
4. Use the **Save As** dialog box to navigate to the location where you want to save the extracted dashboard file(s). Click **OK** to save the selected dashboard data to an XML file.
5. In OneStream XL, click **Application > Presentation > Dashboards > Dashboard Maintenance Units**.
6. Delete each of the existing legacy RPTA Dashboard Maintenance units (all RPTA dashboard groups starting with XFS except **XFS Cube View Styles** and **XFS Parameters**). When deleting the dashboard maintenance units, select **Delete all child items** for efficiency.



7. Next, delete each of the corresponding dashboard profiles (all Standard Application Reports dashboard profiles starting with **XFS**).



Reports Overview Page

The **Reports Overview** page gives a brief description of each report included in the OneStream Standard Application Reports.

Reports Overview

Application Analysis

Report	Overview
Dimension Statistics	Reports the Member counts for each Dimension Name organized by Dimension Types.
Formula Statistics	Reports Member Formula statistics (Pass#, stored counts, dynamic counts, Stored/Dynamic, sign flip & CPU Usage) for Dimension Names by Dimension Types.
Formula List	Reports Member formulas by Pass# by Dimension Name by Dimension Type.
Data Statistics	Reports Cube data statistics for Cube Records, Imported Records & Explosion Factor.
Data Unit Statistics	Reports Data Unit Stats by Entity Name by Cube Name.
Cube Data Partition Statistics	Reports Data Records by Entity by Partition Number.
Stage Partition Statistics	Reports Data Records by Partition Number by Stage Profile Name.
Task Activity Sample	Reports statistics for top 200 Longest running application tasks (Stage Load/Process Cube/Consolidate) and which App Server ran the task.
Data Statistics (Binary)	Reports Cube data statistics for Cube Records, Imported Records & Explosion Factor. (Only for applications using Binary Storage)
Data Unit Statistics (Binary)	Reports Data Unit Stats by Entity Name by Cube Name. (Only for applications using Binary Storage)

Business Rules Audit

Report	Overview
Business Rules - Added	Report shows a document map to the Business rules type, which Rule was added and the user who made the changes.
Business Rules - Updated	Report shows if the Business Rule name was modified and/of if the Business Rule was updated. It also shows the user that modified it and time it was modified.
Business Rules - Deleted	Report shows the Business Rule that was deleted, the users name and when it was modified.

Confirmation Rules Audit

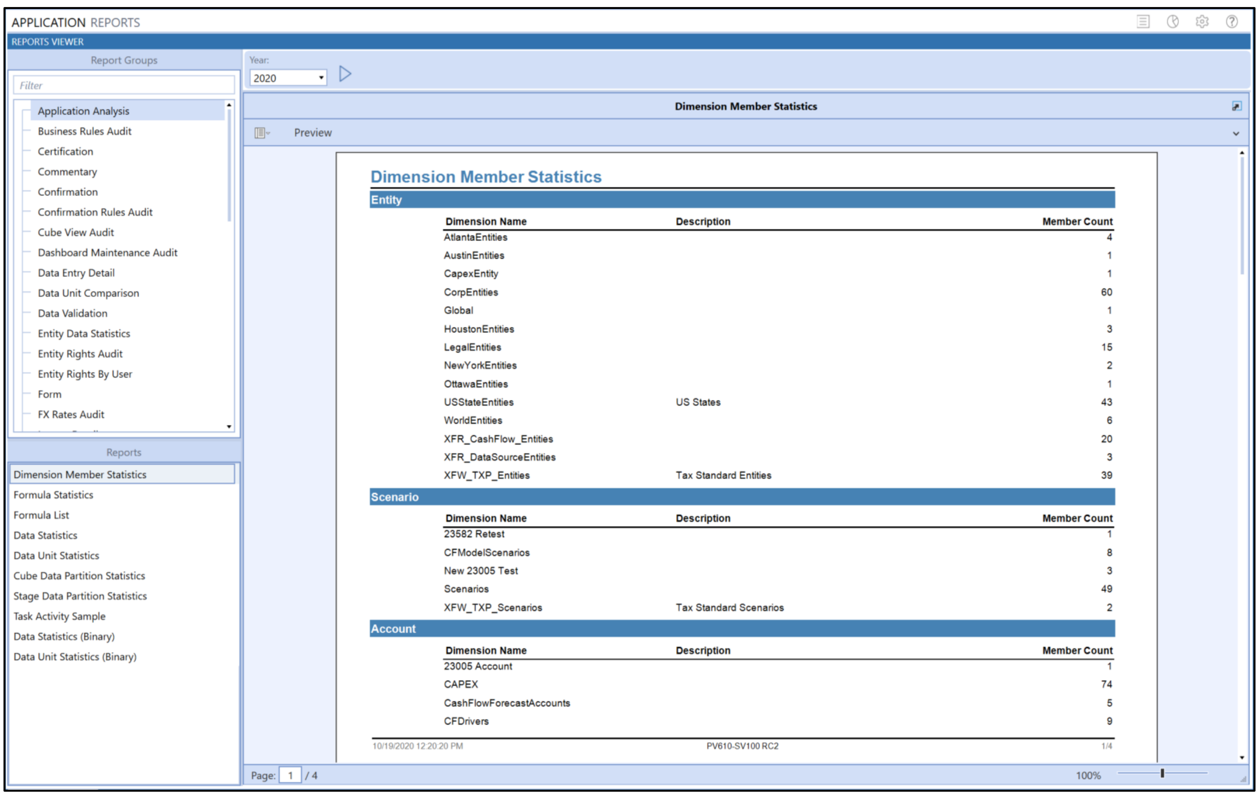
Report	Overview

REPORT VIEWER PAGE

The **Report Viewer** page is the main page where you specify inputs to produce all reports in the Standard Application Reports solution. Reports are logically categorized into report groups.

Standard Application Reports is a self-contained solution, so it is ready to be used after it is imported into the application. To start the Application Reports solution dashboard in OneStream, click **OnePlace > Dashboards > Application Reports > Application Reports**.

The **Report Viewer** Page displays by default. This is the page where you specify inputs to produce all reports in the Standard Application Report solution.

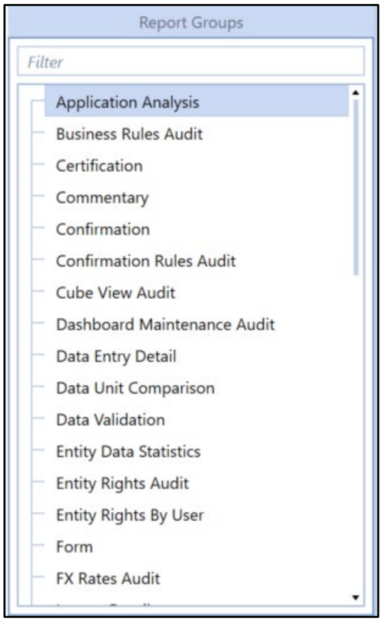


The Application Reports dashboard contains the following panes.

Report Groups Pane

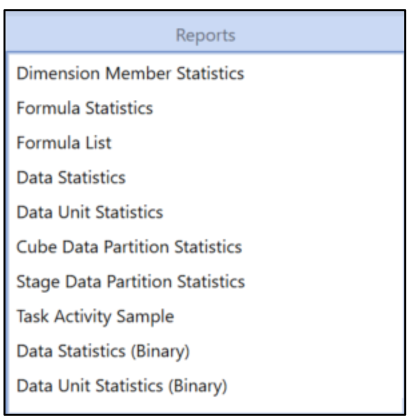
The **Report Groups** pane is the top left pane of the Standard Application Reports dashboard. It lists the report groups you can access based on security access settings made in the **Report Setup** page. Click a report group to see its list of reports in the **Reports** Pane.

See also: Set Security Access for Report Groups and Reports



Reports Pane

The **Reports** pane lists each of the reports available for the currently selected report group in the **Report Groups** pane.



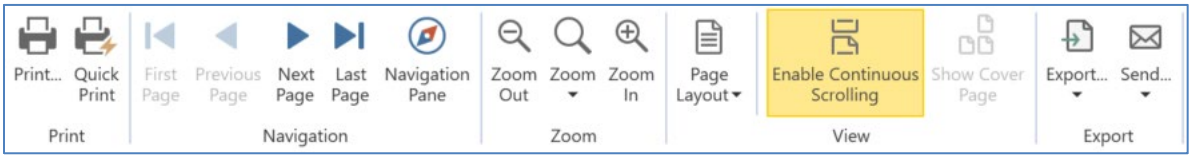
Report Viewer Pane

The **Report Viewer** pane is where reports display. When you select a report group and select a report in the Reports pane, filters display at the top of the pane for most reports. Use the filters to customize the report, then click **Run Report** to display the report. At any time, you can also change filter criteria and click **Run Report** again to update the data that displays in the report.

See also: Reports Overview Page, which contains a brief description of the reports in each group.

Report Viewer Button Bar

While viewing a report, you can use buttons in the Report Viewer button bar to navigate through the report, set viewing options, zoom in and out of parts of the report, and print or export the report.



Print

Use the **Print** and **Quick Print** buttons to control report printing. The **Print** button displays the Windows **Print** dialog box. Set the printer and other print settings for precise printing. Click **Quick Print** to send the report to your default printer with specified print settings.

Navigation

Use these buttons to control navigation through the report.

Click **Previous Page** and **Next Page** to navigate through the document one page at a time. Click **First Page** and **Last Page** to go to the first and last pages in the document.

For some reports you can click **Navigation Pane** to display a navigation pane next to the Report Viewer, which lets you find specific data in the report.

See also: Report Navigation

Zoom

Use these buttons to control the magnification for the report. The **Zoom In** and **Zoom Out** buttons increment or decrement the magnification. Use the **Zoom** button to view the report at a specific magnification, view the entire page, or display pages using the entire Report Viewer pane width.

View

Use the **Page Layout** button to specify the number of pages to display within the Report Viewer pane, or to select the number of pages to show side-by-side. The **Enable Continuous Scrolling** button lets you control scrolling between pages in single or double-page view. Click **Show Cover Page** to navigate to the first page of the current report.

Export

The Export buttons let you export the document for sharing with others. Click **Export** and select an output type to export the document in the specified file format, using the **Export Document** dialog box to specify the location for the output file. Click **Send** to export the document in an available format and send the document in an email.

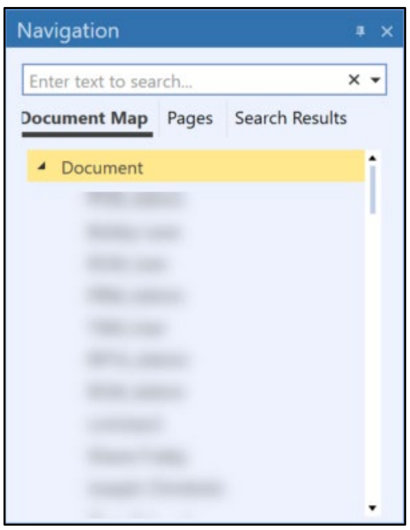
Report Navigation

You can use the **Report Navigation** pane in the Report Viewer to further refine or locate data on your report. This is especially useful when working with very long reports, or when you need to quickly find specific data in a report.

Tabs in the **Report Navigation** pane are as follows.

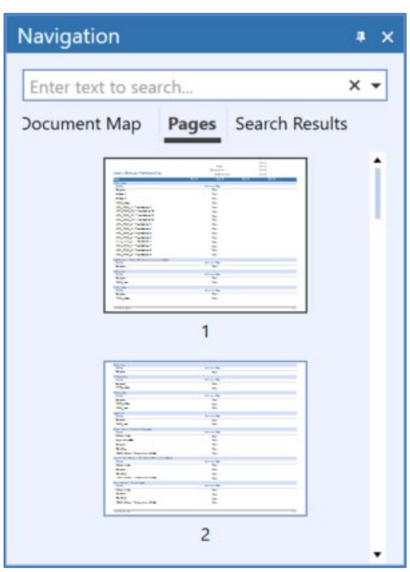
Document Map Tab

Use this tab to view a heading outline of the report and to navigate to specific headings in the current report. To navigate to a specific header, click the name of the header in the Document Map tab. All levels of headings display in the tab, so you can quickly move between headings in the report.



Pages Tab

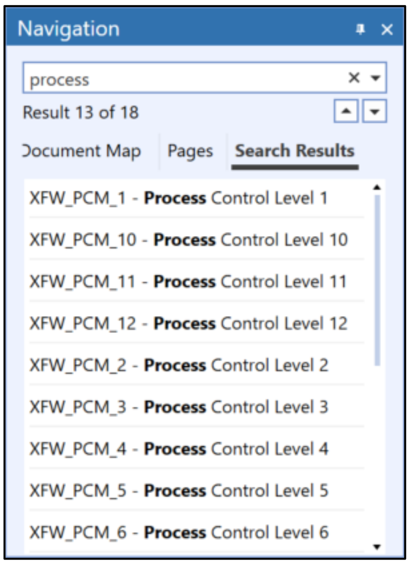
Click this tab to view thumbnail sketches of each page in the current report. You can click on any page in the thumbnails to navigate to that page.



Search Results

The **Navigation** pane lets you search for specific data and see the number of matches in the document. Use the up and down arrows in the search results to navigate through the search matches. The **Search Results** tab shows each match in the document. As you go through search results, the **Search Results** tab highlights the current match, and the report automatically navigates to the page containing the match.

> **Note**: Pages and Search Results features are only available in the OneStream Windows application.



Application Reports

This section:

- Describes the report groups in the Standard Application Reports solution.
- Describes the filters available for each report group. When you select a report group and a report within the group, most reports display filters that let you customize the data that displays in the report.
- Summarizes the reports in each report group.

See also: Reports Overview Page, which contains a brief description of the reports in each group.

Application Analysis Group

Use Application Analysis group reports to get an idea of how effectively the data entities in OneStreamXF (such as dimensions and cubes) are implemented to suit your organization's needs.

Application Analysis Group Report Filters

Year

The year for data in the report. Click the **Year** drop-down to select the year, then click **Run Report**.

Application Analysis Reports

Dimension Member Statistics

This report provides a quick overview of the number of dimension members defined in OneStream XF. It shows the member counts for each dimension name, organized by dimension type for the specified year.

Formula Statistics

This report shows member formula statistics (pass#, stored counts, dynamic counts, ratio of stored and dynamic accounts, sign flip, and CPU usage) for dimension names. Formula statistics are shown in the report by dimension type.

Formula List

This report shows the contents of member formulas. For each dimension name, formula contents display by dimension name and dimension type. This report lets you quickly see the contents of each defined formula to assess if improvements or changes to a formula are needed.

Formulas provide intuitive formula organization and promote reusability of dimensions with their associated calculation across multiple cubes. They also enable parallel processing for performance optimizations using advanced multi-threading that executes multiple formulas at the same time.

Data Statistics

Reports cube data statistics for cube records, imported records, and explosion factor. Explosion factor is automatically calculated. It is the number of cube rows divided by the number of imported staging rows.

Data Unit Statistics

Reports the number of data records by entity name for each cube name. You can see additional Data Unit details in OneStream XF by right-clicking on a cell in a cube view (**OnePlace > Cube Views**) and clicking **Data Unit Statistics**.

See also: *Data Unit* section in the *Workflow* chapter of the *OneStream XF Design and Reference Guide* for more information on data units.

Cube Data Partition Statistics

Reports cube data records by entity, sorted by partition number.

Stage Data Partition Statistics

Reports data records for each stage profile, sorted by partition number.

Task Activity Sample

Reports statistics for the top 200 longest running application tasks by stage load, process cube, and/or consolidate, and the name of the application server that ran the task.

Data Statistics (Binary)

Reports cube data statistics for cube records, imported records, and explosion factor. This report is only for applications using binary storage.

Explosion factor is automatically calculated. It is the number of cube rows divided by the number of imported staging rows.

Data Unit Statistics (Binary)

Reports data unit statistics grouped by entity name, then by cube name. This report is only for applications using binary storage.

Business Rules Audit Group

Use reports in the Business Rules Audit group to monitor business rule activity for audits.

Business Rules Audit Group Report Filters

These filters apply to all reports in the Business Audit Report group.

Business Rule Type

Select a business rule type from the list or select (All) to include all business rule types in the report.

See also: *Business Rule Types* section in the *Application Tools* chapter of the *OneStream Design and Reference Guide* for a detailed description of each business rule type.

Business Rule Name
All business rules belonging to the specified business rule type. If you specify (All) as the business rule type, all business rules for any selected business rule type are included in the report. Click this drop-down list to include only a specific business rule in the report.

Rule Text
Enter a text string to use as a match string to include business rules whose formula contains that text.

> **Note**: Any encrypted business rules are excluded from the report when using a rule text string

User
The name of a specific user whose business rule activity you want to see. Select a specific user from the drop-down or select (All) to include all users in the report.

Start Date/End Date
Enter a start/end date range to include only business rules modified within the specified time range in the report.

Business Rule Audit Reports

Use the reports in the Business Rule Audit report group to understand all activity related to business rules. This includes information on when each business rule was created and updated information on deleted business rules.

Business Rules – Added

This report shows a document map to the business rules type, which business rule was added, the user who made the changes, and the UTC time stamp when the rule was added.

Business Rules – Updated

This report shows if a business rule's name was modified. A checked box indicates if the business rule is updated. It also shows the user that modified the rule and the UTC time stamp of the modification.

Business Rules – Deleted

This report lists business rules deleted from the system. Each deleted rule also shows the modified time/date, and the user that deleted the rule. Deleted rules are grouped by rule type, then by rule name.

Certification Group

Use reports in the Certification group to help understand the relationships between workflows and the certification question sets that are used in the workflow's confirmation steps, and to see certification details for workflow descendants.

Certification Group Report Filters

There are no filters for this report group. Reporting is for all workflows or the current workflow.

Certification Reports

Certification Check List

This report lists each workflow and the associated certification profile, with current workflow POV status and all workflow profile descendants.

Certification Status

Grouped by workflow, this report lists the certification groups assigned to each workflow with status for the current workflow and all descendants.

Certification Detail

This report shows the certification status history for the current workflow and all its descendants.

Commentary Group

Reports in the Commentary report group provide details on data attachments (also known as comments) added to the currently selected workflow either at the cell level or to an entire data unit within a workflow. Reports show attachments by account within the workflow.

Commentary Group Report Filters

Entity

The name of the entity for which you want to view commentary. Select an entity from the list or leave blank to include all entities within the currently selected workflow.

Account

A named account within the currently selected workflow. Select an account from the list or leave blank to include all accounts within the currently selected workflow.

Attachment Type

Select a specific attachment type or commentary within the currently selected workflow or select (All) to include all attachment types in the report.

Commentary Reports

Commentary Detail

Lists comments attached to the entities for the current workflow POV. Detailed POV information is listed for each comment. The report is grouped by entity, then by account. The report shows the selected account in each entity, and information for each entity includes cube view POV information, flow, IC, and user defined dimension type origin, along with a list of the comments. Information for each comment includes the user who created the comment and the time the comment was created.

Commentary By Entity & Account

A list of all comments attached to the entities for the current workflow POV. This report is grouped by entity, then by account. Information for each commentary includes the user who created the commentary and the time the commentary was created.

Confirmation Group

Reports in the Confirmation group show status information related to the data confirmation process, which is controlled by the OneStream XF Data Quality engine.

See also: *Data Quality Engine* section in the *Foundation Guides* chapter of the *OneStream Design and Reference Guide* for more information about confirmation rules.

Confirmation Group Report Filters

There are no filters for this report group. Reports are based on the currently selected scenario and time period.

Confirmation Reports

Confirmation Check List

This report lists the confirmation profile assigned to each workflow with status for the current workflow POV and all workflow profile descendants.

Confirmation Status

This report shows the confirmation groups assigned to each workflow profile, with status for the current workflow and all descendants.

Confirmation Detail

This report shows the confirmation status history for the current workflow and all descendants.

Confirmation Rules Audit Group

The Confirmation Rules Audit reports show confirmation rule activities for added, updated, and deleted rules for a selected audit period.

Confirmation Rules Audit Group Report Filters

Confirmation Rule Group

Select a confirmation rule group from the list or select (All) to include all confirmation rule groups in the report.

See also: *Confirmation Rules* section in the *Foundation Guides* chapter of the *OneStream Design and Reference Guide* for more information about confirmation rules.

Confirmation Rule Name

All confirmation rules belonging to the specified confirmation rule group. If you specify (All) as the confirmation rule name, all confirmation rules for any confirmation rule group are included in the report. Click the drop-down list to include only a specific confirmation rule in the report.

Rule Text

Enter a text string to use as a match string to include confirmation rules whose formula contains that text.

User

The name of a specific user whose confirmation rule activity you want to see. Select a specific user from the drop-down or select (All) to include all users in the report.

Start Date/End Date

Enter a start/end date range to include only confirmation rules modified within the specified time range in the report.

Confirmation Rules Audit Reports

Confirmation Rules – Added

This report shows the confirmation rules added over a specified time range. Information for each rule includes the rule name, rule text, the user who added the rule, and the UTC time stamp showing when the rule was added.

Confirmation Rules – Updated

This report shows confirmation rules that were updated over a specified time range. Information for each rule includes the original and updated rule name, whether the rule text or rule formula has been updated, the name of the user, and the date/time the rule was last updated.

Confirmation Rules – Deleted

This report lists all the confirmation rules deleted over a specified time range. Information for each rule includes the rule name, rule text, the user who deleted the rule, and the UTC time stamp showing when the rule was deleted.

Cube View Audit Group

The Cube View Audit reports show cube view maintenance activities for updated, added, and deleted cube views for the specified audit period.

Cube View Audit Group Report Filters

Start Date/End Date

Enter a start/end date range to include only cube views within the specified time range in the report.

CV Group Filter (Contains)

Enter a text string that matches a string in the name of one or more cube view groups you want in the report. For example, entering Process would include all cube view groups in the report with Process in the group name, such as Process (Flash) and Process (Budget). Leave this field blank to include all cube views and cube view groups in the report.

Cube View Audit Reports

Cube Views – Added

This report lists cube views (reports/forms) added over a specified time range. Information for each rule includes the user who added the cube view, the cube view name, the group it is in, and the UTC time stamp when the cube view was added.

Cube Views – Updated

This report lists cube views (reports/forms) updated over a specified time range. Information for each rule includes the user who last updated the cube view, the cube view name, the group it is in, and the UTC time stamp of the update action.

Cube Views – Deleted

This report lists cube views (reports/forms) deleted over a specified time range. Information for each rule includes the user who deleted the cube view, the cube view name, the group it is in, and the UTC time stamp when the cube view was deleted.

Dashboard Maintenance Audit Group

Dashboard maintenance units enable sharing of key dashboard artifacts like parameters, data adapters, common files, and components across multiple dashboard groups.

See also:

- *Presentation Guides* chapter in the *OneStream XF Design and Reference Guide* for more information on dashboard maintenance units.
- *Foundation Guides* chapter in the *OneStream XF Design and Reference Guide* for more information on dashboard maintenance units.

Use the reports in the Dashboard Maintenance Audit report group to see all activity related to dashboard maintenance units. This includes information about the creation of each dashboard maintenance unit, any record on dashboard maintenance units that were updated or deleted.

Dashboard Maintenance Audit Group Report Filters

Maintenance Unit
The name of a specific dashboard maintenance unit to show in the report. Select (All) to include all dashboard maintenance units in the report.

Maintenance Group
Select a defined maintenance group to show only dashboard maintenance activity for the selected group within the specified dashboard maintenance unit.

Start Date/End Date
Enter a start/end date range to include only dashboard maintenance records that were created, updated, or deleted within the specified time range.

Dashboard Maintenance Audit Reports

> **Note**: The Dashboard Maintenance Audit – Updated report shows values that have been updated in the **New Value** column. Values that cannot be retrieved by the system display as (Unavailable Value) in those reports. Values that display as (Unassigned) have been set back to their default value.

Dashboard Maintenance – Added

This report shows all activity for dashboard maintenance units that have been added to OneStream XF during the specified time period. The total number of records in the report displays on the left side of the report header. Selected report filters display on the right side of the report header.

Dashboards with add activity in the specified date range display in alphabetical order by specified maintenance unit. Each add record also shows the name of the user who performed the add and the UTC time stamp of when the record was created.

Dashboard Maintenance – Updated

This report shows all activity for dashboard maintenance units that have been updated to OneStream XF during the specified time period. The total number of records in the report displays on the left side of the report header. Specified report filters display on the right side of the report header.

Dashboards with update activity in the specified date range display in alphabetical order by specified maintenance unit. Each update record shows the dashboard group and the attribute being changed with the old and new values. Each update record also shows the name of the user who performed the update and the UTC time stamp of when the record was updated.

Dashboard Maintenance – Deleted

This report shows all activity for dashboard maintenance units that have been deleted in OneStream XF during the specified time period. The total number of records in the report displays on the left side of the report header. Specified report filters display on the right side of the report header.

Dashboards with delete activity in the specified date range display in alphabetical order by specified maintenance unit. Each delete record also shows the name of the user who performed the update and the UTC time stamp of when the record was updated.

Data Entry Detail Group

The Data Entry report group contains a single report, named the Data Entry Detail report.

Data Entry Detail Group Report Filters

There are no filters for this report group. The report shows all data entry detail for the current workflow scenario.

Data Entry Detail Reports

Data Entry Detail

Shows data manually entered by form. Records are sorted in alphabetical order by workflow profile, then by cube view.

Data Unit Comparison Group

The Data Unit Comparison report group has a single report, named the Data Unit Comparison report.

Data Unit Comparison Report Group Filters

Cube
The cube containing the data units to be compared.

Scenario
Select the scenario you want to use for the comparison.

Variance Scenario
Select a scenario you want to use as the variance for the comparison.

Time
The month and year for which you want to view records in the report.

View
Specify a numeric view member used for calculations to display data unit comparisons. Value is YTD (year-to-date) or Periodic.

Cons Member
Specify the consolidation member for which to compare data units.

Entity
The name of the entity for which you want to compare data units. Select an entity from the list or leave blank to include all entities within the currently selected workflow.

Suppress Matches
Determines if data units with Intercompany suppressed matches display in the report (Yes/No).

Data Unit Comparison Reports

Data Unit Comparison

Report that shows any variance between two scenarios for the specified entity.

Data Validation Group

Reports in the Data Validation group provide data validation statistics information for source and target account mappings in workflows.

Data Validation Group Report Filters

Dimension (Unmapped by Dimension Report only)
The dimension type to report on. This can be an entity, account, flow, or a user-defined dimension.

Workflow Profile
The workflow profile within the current workflow to use for the report.

Data Validation Reports

Intersection Errors

Intersection errors indicate something is incorrect with an entire data intersection, such as if a customer dimension is mapped to a salary grade account. This report displays any intersection validation errors that exist within the current workflow and current workflow time period.

See also: *OnePlace Workflow* chapter of the *OneStream XF Design and Reference Guide* for more information on intersection errors.

Unmapped By Dimension

Report shows unmapped areas within a dimension and workflow profile. It shows profile, time, entity, account and the account description.

All Stage Source and Target Data

Report displays all the imported source data and the OneStream targeted account for the source data.

All Unmapped Dimensions

Report displays all the unmapped dimensions and shows the profile name, source/target time, entity, account, description and which dimension they are currently mapped to.

Entity Data Statistics Group

The Entity Data Statistics report group contains a single report, called the Entity Data Statistics report.

Entity Data Statistics Group Report Filters

Entity

The name of the entity for which you want to view data statistics. Select an entity from the list.

Entity Data Statistics Reports

Entity Data Statistics

This report shows total cells of data, input cells, journal cells, calc cells, no data cells, and zero data cells for every scenario in the specified entity. Data in the report is grouped by workflow profile and scenario within each year.

Entity Rights Audit Group

This report group contains a single report, called the User Entity Rights by Cube report.

Entity Rights Auditing Group Report Filters

User
The name of the user whose entity rights you want to include in the report. The value defaults to the user currently logged in. Select a defined user from the list.

Display Data, Read Data, Read and Write Data
Select Yes to show all read and read/write permissions for the specified user. Select from the following values:

Yes: Display read and read/write permissions set to **Yes**.
No: Display read, and read/write permissions set to **No**.
(Not Restricted): Display all permissions set for the specified user.

Entity Rights Audit Reports

User Entity Rights By Cube

This report shows security rights for a specific user for all entities, grouped by cube, then by entity name in alphabetical order. This report shows read access, read/write access, and cube data access permissions.

Entity Rights By User Group

This report group contains a single report, called the User Entity Rights by Cube report.

Entity Rights by User Group Report Filters

Cube
The name of the cube for which you want to view user's entity rights.

Entity
The name of the entity for which you want to view entity rights. Select an entity from the list.

Display Data, Read Data, Read and Write Data
Select from the following values:

Yes: Display read, and read/write permissions set to **Yes**.
No: Display read, and read/write permissions set to **No**.
(Not Restricted): Display all permissions set for the specified user.

Entity Rights By User

This report lists security rights by user for a specified cube/entity. Displays read access, read/write access, and cube data access.

Form Group

The Form group contains a single report, called the Form Checklist.

Form Group Report Filters

There are no filters for this report group. Data in the report is based on the currently selected workflow profile, scenario, and time period.

Form Reports

Form Checklist

Shows all input forms in the currently selected workflow, scenario, and time period. Items in the report are sorted by Form type (such as Optional or Required) then by form name. Each form includes the form description (if any), the form completion status with associated cube view, comments, and audit information. The currently selected scenario and time period display on the side of the report header.

FX Rates Audit Group

Reports in the FX Rates Audit Group provide modification and status information related to currency exchange rates in OneStream XF.

See also: *Foreign Exchange* Rates section in the *Cube* chapter of the *OneStream XF Design and Reference Guide* for more details about FX rates in OneStream XF.

FX Rates Audit Group Report Filters

Rate Type

The name of a specific FX rate type. Select a specific rate type from the list or select (All) to include all users in the report.

Rate Period

Enter a monthly or yearly period (for example, 2020M11) to display only FX rate changes made in that period or leave blank to report on modifications made in all periods.

Status

The lock status of the FX rate modifications you want to display in the report. Select Locked, Unlocked, or (All) to include all modifications regardless of lock status.

User

The name of a specific user whose FX rate modification activity you want to see. Select a specific user from the drop-down or select (All) to include all users in the report.

Start Date / End Date (FX Rates Lock/Unlock Audit only)

Enter a start/end date range to include only FX rate information modified within the specified time range in the report.

FX Rate Audit Reports

FX Rate Lock/Unlock Audit

This report displays all FX rates that were locked or unlocked, the user, and the date/time modified.

FX Rate Current Status

This report displays the current status of the FX Rates for a specified time period.

Import Detail Group

Reports in the Import Detail group provide source and target mapping information for a specified workflow profile. This data is pulled from the transformation rules and imported stage data found on the specified workflow profile. Use these reports to get an understanding of the state of imported and derived data in OneStream XF.

Import Detail Group Report Filters

Workflow Profile

The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow display in the list.

Import Detail Reports

Import Detail (All Both Signs)

This report shows imported source data (imported and derived) with original (source) sign and sign after (target) mapping for the specified workflow import profile. The currently selected time period and scenario display on the right side of the report header. Import detail displays in entity alphabetical order for the specified workflow profile. For each entity in the workflow profile displays with account number, account description, currency type, and source and target amounts.

Import Detail (All Data)

Shows all source data (imported and derived) with source sign convention for the selected workflow import profile. The currently selected time period and scenario display on the right side of the report header. For the specified workflow profile, each target entity and related target accounts are listed with their source accounts and source amounts. Each includes the account number, account description and amounts.

Import Detail (Imported Data)

This report shows only the imported source data with source sign convention for the selected workflow import profile. The currently selected time period and scenario display on the right side of the report header. For the specified workflow profile, each target entity and related target accounts are listed with account number, account description and amounts.

Import Detail (Derived Data)

This report shows only the derived source data with source sign convention for the selected workflow import profile. The currently selected time period and scenario display on the right side of the report header. For the specified workflow profile, each target entity and related target accounts are listed with account number, account description and amounts.

Import Detail (Account Mapping) Group

The Import Detail (Account Mapping) group contains one report, called Import Detail (Account Mapping).

Import Detail (Account Mapping) Group Report Filters

Workflow
The name of a workflow which you want to view import mapping data. Select a workflow from the list.

Scenario
The scenario within the specified workflow for which you want to view account mappings.

Time
The month and year for which you want to view records in the report.

Import Detail (Account Mapping) Reports

Import Detail (Account Mapping)

This report shows the account mapping from import accounts to target account for the specified workflow, scenario, and time period. The selected workflow and time period display on the right side of the report header. For each OneStream account target, the report shows the source and target account mappings with the source and target account descriptions.

Import Detail (All Dims) Group

This report group provides insights into the state of stage data imported into OneStream XF by dimension, based on a specified workflow profile within the currently selected workflow. The scenario and time period for the currently selected workflow profile display on the right side of the report header.

Import Detail (All Dims) Group Report Filters

Workflow Profile
The name of a workflow profile in the currently active workflow. Only workflow profiles from the current workflow display in the list.

Import Detail (All Dims) Reports

Import Detail (All Dims, All Data)

This report lists target imported and derived data showing all dimensions (including user defined dimensions) for the current workflow POV. Data displays in alphabetical order by workflow profile, then by target entity and target account.

Import Detail (All Dims, Imported Data)

This report shows all target imported data showing all import detail for all dimensions for the current workflow POV. Source sign convention is included for all amounts. Data is grouped by workflow profile, then by target entity and target account. Each target entity also displays its source entity.

Import Detail (All Dims, Derived Data)

This report shows all derived data showing import detail for all dimensions for the current workflow POV. Source sign convention is included for all amounts. Data is grouped by workflow profile, then by target entity and target account.

Import Detail (All Imports) Group

This report group provides insights into the state of all data imported into OneStream XF import accounts. For each report, the scenario and time period for the currently active workflow profile display on the right side of the report header.

Import Detail (All Imports) Group Report Filters

There are no filters for this report group. Report data is based on import data from the currently active workflow POV.

Import Detail (All Imports) Reports

Import Detail (All Imports, All Data)

This report shows all imported source data (including bypassed mapped rows) for all workflow imports combined. For each target entity and target account, the report shows account number, account description, account amounts, and the associated workflow profile. Source sign convention is included for all amounts.

Import Detail (All Imports, All Dims, All Data)

This is a full report of all imported data for all dimensions and all workflow imports combined, including bypassed mapped rows. The report is grouped by workflow profile, target entity, and target account. Source sign convention is included for all amounts.

Import Detail (Source Id) Group

Reports in the Import Detail (Source Id) group provide several views into imported and derived data based on source ID of the imported data.

Import Detail (Source Id) Group Report Filters

Workflow Profile

The name of a workflow profile in the current workflow POV. Only workflow profiles from the current workflow display in the list.

Import Detail (Source Id) Reports

Import Detail, SID (All Both Signs)

This report shows all imported source data with original sign and sign after mapping (source and target sign) for the specified workflow import profile. Report data is grouped by workflow profile, then by source ID, target entity, and target account. Import detail for each workflow profile includes the source ID, account number and description, currency type for the account, and source and target amounts. Bypass values are noted.

Import Detail, SID (All)

This report shows all imported source data with sign convention for the specified workflow import profile. Imported source data is grouped by workflow profile, then by source ID, target entity, and target account within the workflow profile. Import detail for each workflow profile includes the source ID, account number and description. Bypass values are noted.

Import Detail, SID (Imported)

This report shows imported source data with sign convention for selected workflow import profile. The report data is grouped by workflow profile, then by source ID, target entity, and target account within the workflow profile. Import detail for each workflow profile includes the source ID, account number and description. Bypass values are noted.

Import Detail, SID (Derived)

This report is much like the Import Detail, SID (Imported) report, but for derived source data with sign convention for selected workflow import profile. The report data is grouped by workflow profile, then by source ID, target entity, and target account within the workflow profile. Derived detail for each workflow profile includes the source ID, account number and description. Bypass values are noted.

Import Detail (Source to Target) Group

The Import Detail (Source to Target) report group contains a single report, called the Import Detail (Source to Target) report.

Import Detail (Source to Target) Report Group Filters

Workflow
The name of a workflow for which you want to view source to target mapping data. Select a workflow from the list.

Scenario
The scenario within the specified workflow for which you want to view source to target mappings.

Time
The month and year period for which you want to view records in the report.

Import Detail (Source to Target) Reports

Import Detail (Source to Target)

This report lists trial-balance type accounts showing source accounts with corresponding target accounts and values. Filtering criteria used for the report displays on the right side of the report header.

This report lists the source to target mappings, showing the source account and entity with corresponding target account and entity with ledger descriptions and account amounts.

Import Trace Group

Reports in this report group show imported and derived data traced back to the source account data. The scenario and time period for the currently selected workflow profile display on the right side of the report header.

Import Trace Group Report Filters

Account
The account number for which to view rule trace data.

Import Trace Reports

Trace (Target Account)

This report shows all imported and derived source data records that were mapped to the selected target account for descendants of the current workflow POV. Data is grouped by workflow profile, then by target account. Each target account in the report shows the source entity, account number and description, the currency type if known, and amount in the account.

Trace (Target Account Rule)

List of transformation rules that mapped either imported or derived data to the selected account for descendants of the current workflow. Data in the report is sorted by workflow, with the specified account number displaying under the report header. For each record, the report displays all rule trace information including rule group name, rule name, the rule expression and output, whether account data can be flipped from positive to negative and vice versa, and any logical operator or logical expression.

Import Var (WF vs Preserved) Group

Reports in this group reveal variances between data in the currently active workflow and preserved data. Data in these reports comes from transformation rules and imported stage data found in a specified workflow profile.

Import Variance (WF vs Preserved) Group Report Filters

Workflow Profile

The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow display in the list.

Import Var (WF vs Preserved) Reports

WF vs Preserved Detail (All, Sign Flip)

This report compares preserved data and current stored data (with mapped sign change) for the specified import workflow and current workflow time and scenario.

WF vs Preserved Detail (All)

This report compares preserved data and current stored data for the specified import workflow and current workflow time/scenario.

Import Var (WF vs Prompt) Group

Reports in this report group look at the variances between preserved data and actual data in the currently active workflow. Data in the reports are grouped by workflow profile, then target entity and target account. Each record shows the entity and account within the entity with the account description, currency types and the variance.

Import Variance (Workflow vs Prompt) Group Report Filters

Workflow Profile

The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow display in the list.

Variance Scenario
Select a scenario you want to use as the variance for the comparison.

Time
The month and year for which you want to view records in the report.

Import Var (WF vs Prompt) Reports

WF vs Prompt Detail (All)

This report compares current workflow data and the specified workflow import data, the specified time, and the specified scenario.

WF vs Prompt Detail, SID (All)

This report compares current workflow data and specified workflow import (by Source ID), specified time, and specified scenario.

Intercompany Group

Reports in the Intercompany group show various slices of intercompany matching data available from OneStream XF cube views.

Intercompany Group Report Filters

Plug Account
Select the intercompany plug account used to handle any non-eliminating transactions.

Intercompany Reports

Intercompany Matching Checklist

This report shows the currently selected workflow's intercompany balances in the specified intercompany plug account. It displays the intercompany matching parameters at the top of the report, and lists each entity using the plug account at their current balances. The currently selected scenario and time period display on the right side of the report header.

See also: *Intercompany Matching Settings* section in the *Workflow* chapter of the *OneStream XF Design and Reference Guide* for more information about setting up intercompany matching data.

Intercompany Matching Status

This report displays the current workflow's intercompany matching detail information for the specified plug account. Plug account information for each entity includes the reporting, entity, and partner currency, the entity intercompany payables and receivables, and their differences. The currently selected scenario and time period display on the right side of the report header.

Intercompany Matching Detail

The Intercompany detail report contains the same data as the Intercompany matching status report, but also includes comments for the selected plug account.

Intercompany Detail (Overrides) Group

Reports in the Intercompany Detail (Overrides) group focus on Intercompany account matching detail from intercompany override plug accounts viewable in Cube Views.

Intercompany Detail (Overrides) Group Report Filters

Plug Account
Select the intercompany plug account used to handle any overrides.

View
Specify a numeric view member used for calculations to display intercompany overrides. Value is YTD (year-to-date) or Periodic.

Entity
The name of the entity for which you want to view intercompany details. Select an entity from the list.

Intercompany Detail (Overrides) Reports

Intercompany Detail (Overrides)

Provides intercompany override details for the specified plug account/view/entity using the current workflow profile POV.

Intercompany Detail (All Plug Accounts)

Provides intercompany details for the specified view and all plug accounts using the current workflow profile POV. Plug account and entity selections are not applied to this report.

Intercompany Detail (All Periods In Workflow Year)

Provides intercompany details for the specified plug account/view and all time periods in the current workflow profile POV. Entity and view selections are not applied to this report.

Journal Group

Reports in the Journal group provide details on the status of journals in a specified workflow profile. Use these reports to see progression and account detail of the currently selected workflow profile's journals.

Journal Group Report Filters

Journal Status

Select a status for the journals to display in the report. Only journals currently in the selected status display in the report. Journal statuses are:

- Working
- Submitted
- Approved
- Rejected
- Posted

Entity Name (Starts With)

You can specify only certain journals in specific entities to be included in the report by typing a common string for the specific entities. Use this filter in conjunction with the account name feature to further filter the journal entries in the report.

Account Name (Starts With)

You can specify only certain accounts in specific entities to be included in the report by typing a common string for the specific account numbers.

Journal Reports

Journal Checklist

Provides a check list of journals for the current workflow POV. You can filter the report by journal status, entity name, and account name. All optional and required journal entries matching the filtering criteria display in the report. For each journal, the report shows the current status and the journal type. Each journal also shows the dates for each journal status if that status has been attained. Otherwise the date is blank. For reference, the scenario and time period for the currently selected workflow display in the right side of the report header along with the workflow name.

Journal Detail List

Provides details of all journals for the current workflow POV. You can filter the report by journal status, entity name, and account name. Journal information is detailed for each entity with the account listed with dimension data, account description, debit and credit balances.

Journal Publishing Group

This report group contains a single report, called Single Journal Detail.

Journal Publishing Group Report Filters

Journal Name (Starts With)
You can specify a string to include only journal names matching the string in the report.

Journal Publishing Reports

Single Journal Detail

This report provides details for each journal in the currently selected workflow POV. You can filter the report by journal name. For each journal, the report shows the current status and the journal type. Each journal also shows the dates for each journal status if that status has been attained. Otherwise the date is blank. For reference, the scenario and time period for the currently selected workflow display in the right side of the report header along with the workflow name.

Map Change Group

This group of reports provides general and audit information on transformation rule mappings from source systems to the OneStream XF financial model. Use these reports to see historical data on transformation mapping change activity for transformation rule profiles during a specified date range. You can find transformation rules in OneStream XF under **Application > Data Collection > Transformation Rules**.

Map Change Group Report Filters

Transformation Rule Profile
The name of a specific transformation rule profile whose mapping information you want to include in the report. Select a transformation rule profile from the list or select (All) to include all transformation rule profiles.

Change Type
You can specify one change type whose mapping changes you want to include in the report. Select Added, Updated, or Deleted, or select (All) to include all change types in the report.

User
The name of a specific user whose transformation rule change activity you want to see. Select a user from the drop-down or select (All) to include all users in the report.

Start Date/End Date
Enter a start/end date range to include only map changes made within the specified time range in the report.

Map Change Reports

Transformation Rule Changes Audit

This report contains all mapping changes that have occurred in the system over a selected time frame for the specified transformation rule profile(s). Data in the report is grouped by change type, then by rule group. Rule profile selection and all other report specifications are based on the current workflow. Each change shows the rule type and name, the rule expression, the name of the user, and the time the change was made.

Transformation Rule Changes History

Shows all mapping changes that have occurred in the system over a specified time frame for a specified transformation rule profile. The report is grouped by rule group. Transformation rule profiles that you can specify are based on the current workflow.

Map Change For User Group

The Map Change For User group contains a detailed audit report on transformation rule mapping changes made by a specific user, or by all your OneStream XF users.

See also: *Transformation Rules* section in the *Data Collection* chapter of the *OneStream XF Design and Reference Guide* for more information about transformation rules.

Map Change For User Group Report Filters

User

The name of a specific user whose transformation rule activity you want to see. Select a user from the drop-down or select (All) to include all users in the report.

Change Type

You can specify one change type whose mapping changes you want to include in the report. Select Added, Updated, or Deleted, or select (All) to include all change types in the report.

Start Date/End Date

Enter a start/end date range to include only map changes made within the specified time range in the report.

Map Change For User Reports

Transformation Rule Changes Audit For User

Lists all map changes over a specified time range for a specified user. Each change shows the rule type and name along with the rule expression, the name of the user, and the time the change was made. Changes listed by change type. The filter criteria used in the report displays on the right side of the report header.

Map Transformation Listing Group

This group contains a single report that displays all the transformation rules defined in OneStream XF based on the specified map rule group.

Map Transformation Listing Group Report Filters

Map Rule Group

The name of the group containing the map rules you want listed in the report. Select a rule group in the list or select (All) to include all transformation mapping rule groups in the report.

Map Transformation Listing Reports

Transformation Rule Listing

Shows transformation rule details for all transformation rule groups or a single specified group. Rule group information in the report is sorted alphabetically by rule group name. Information for each rule group includes all the rules belonging to the group. Each rule shows its rule description and rule expression when available, the rule output, logical operator (if used), and any logical expression for the rule. A blank rule description means a rule description is not entered for the rule in the transformation rule settings. NA means the rule description does not apply to that rule.

Each rule in the report also includes a flip sign indicator (FS). If selected, the display value is flipped from positive to negative or vice-versa. This is typically done with expense numbers stored as positive or negative that need to be reversed on reports such as a trial-balance.

Metadata Analysis Group

Reports in this group provide general information regarding the metadata and metadata members in OneStream XF.

Metadata Analysis Group Report Filters

There are no filters for this report group. Report data is based on cube dimension data in OneStream XF.

Metadata Analysis Reports

Orphaned Members

This report shows any members that exist in a dimension that are currently not assigned to any dimension hierarchy, based on data in the dimension library. Dimension types with orphaned members list the orphaned members in alphabetical order, along with the member description and member ID.

Parent Count For Members

A list of dimension members by member ID, member description, and number of parent members for each.

Cube Maintenance Dashboard (30 Days)

This report displays in a graph format and does not have any filters.

The left pane shows the cube dimension assignment changes that occurred in the last 30 days. The top right pane shows the dimension member changes that occurred in the last 30 days. The bottom right pane displays the dimension node changes that occurred in the last 30 days (also known as the Custom Dimensions, for example UD1 and UD2).

Metadata Change Audit Group

Metadata Change Audit reports show different types of metadata additions, updates, and deletions made in OneStream XF dimensions over a specified date range.

Reports in this group display the filtering criteria on the right side of the report header.

Metadata Change Audit Group Report Filters

Change Type
Specify the types of metadata changes to include in the report. Select Added, Updated, or Deleted, or select (All) to include all metadata changes in the report.

Dimension
You can report on a specific dimension by selecting it from the list or select (All) to include all dimensions in the report.

Start Date/End Date
Enter a start/end date range to include only metadata changes made within the specified time range in the report.

Metadata Change Audit Reports

Member Changes Audit

This report shows changed dimension member metadata made over a specified time frame. Changes are listed by change type, then by dimension. Each change shows the dimension name with the member name and description, the user who made the change, and the time stamp of when the change was made.

Member Formula Changes Audit

This report is like the Member Changes Audit report, but for formula metadata. This report shows changed member formulas over a specified time frame. Changes are listed by change type, then by dimension type. Each change shows the dimension member name and description, the user who made the change, and the time stamp of when the change was made. Under each change, the actual change made to the formula is displayed.

Member Changes Detail Audit

This report details each change made to dimension members (including property changes) over a specified time frame. Changes are listed by dimension type, then by change type within the dimension. Each change shows the dimension member name and description, the dimension name, the user who made the change, and the time stamp of when the change was made. For property changes in dimension types, the report shows the type of change made and the member name, with the changed property name and value. Property changes also show the user who made the change and the time stamp of when the change was made.

Member Property Changes Audit

This report shows a detailed list of member property changes over a specified time frame. Changes are listed by dimension type, then by the time stamp when the change was made. Each change shows the change type, the dimension member name and description, the name of the property that changed and the value that changed, the user who made the change, and the time stamp of when the change was made.

Metadata Changes During Task Execution

Because metadata change can occur as part of task execution, this report shows metadata changes made during task processing during a specified time frame. Tasks are always shown, even if no metadata changes occurred during the specified time frame.

This report is similar in structure to the Member Changes Detail Audit report. Changes are listed by dimension, then by change type within the dimension. Each change shows the dimension member name and description, the dimension name, the user who made the change, and the time stamp of when the change was made. For property changes in dimension types, the report shows the type of change made and the member name, with the changed property name and value. Property changes also show the user who made the change and the time stamp of when the change was made.

Relationship Detail Audit

This report shows changed member relationships over a specified time frame. Changes are grouped by dimension type, then change type. Each change in the list includes the type of change and member name, the parent member, the dimension name and sort order. Changes also show the user who made the change and the time stamp of when the change was made.

Metadata Entity Property Change Audit Group

This report group consists of the Entity Relationship Property Audit report. Filter criteria for the report displays on the right side of the report header.

Metadata Entity Property Change Group Audit Report Filters

Change Type

Specify the types of metadata changes to include in the report. Select Added, Updated, or Deleted, or select (All) to include all metadata changes in the report.

Start Date/End Date

Enter a start/end date range to include only metadata entity property changes made within the specified time range on the report.

Metadata Entity Property Change Audit Reports

Entity Relationship Property Audit

This report lists all entity relationship property changes by user for a specified time range. Changes are sorted by dimension type. Data for each change includes the change type, member name, the member's parent, the property that changed, the changed value, the user who made the change, and the time stamp of when the change was made.

Slice Data Cell Rights Group

Data slices are used to protect the main data of a cube against changes. This protection affects input-ready queries and all planning functions that use a cube. If you want to ensure that certain plan versions can no longer be changed after a certain point in time, for example, and current data is not overwritten, you can use a data slice that contains these plan versions.

The Slice Data Cell Rights report group has a single report called Slice Cell Data Rights.

Slice Data Cell Rights Group Report Filters

User

The name of a specific user whose data access security rights you want to see. Select a specific user from the drop-down or select (All) to include all users in the report.

Slice Data Cell Access

Determines the user records to show in the report.

- Yes: Show data rights on sliced cells where the user has data rights.
- No: Show data rights on sliced cells where the user does not have data rights.

Slice Data Cell Rights Reports

Slice Data Cell Rights

This report shows any slice level data security for a specified user. The report lists the selected user and shows slice cell data rights by workflow. This includes the data cell access security level, the member filter expression (if defined), and the order in which the data rights are evaluated.

See also: *Member Filters* in *Chapter 7: Cube* of the *OneStream XF Design and Reference Guide* for more details on Member Filters Expressions and how to use the Member Filter Builder to build member filter expressions.

User Data Entry Detail Group

The User Data Entry Detail group contains a report that details a single user's manual data entry activity. Use the report in this group to inventory a specific user's manual data entry in a specific scenario during a specific time period.

User Data Entry Detail Group Report Filters

Scenario

The scenario within the specified workflow for which you want to view data entry details.

Time

The month and year for which you want data entry records included in the report.

User

The name of a specific user whose data entry activity you want to see. Select a user from the drop-down or select (All) to include all users in the report.

User Data Entry Detail Reports

Data Entry Audit (Single User)

This report shows all data manually entered into the system by the specified user for a scenario and time period. The report is grouped by workflow profile. The filter criteria for the report displays on the right side of the report header, including the specified user whose data entry activity is displayed. Each record shows the date and time of the change, dimension information (including user-defined dimensions) of the change, and the amount.

User Log Activity Group

This report group provides user activity for logons, tasks, and errors related to OneStream XF sessions. User log activity data is taken from activity in **System > Logging** in OneStream XF.

Filter criteria used for the report displays on the right side of the report header for all reports.

User Log Activity Group Report Filters

Number of Days
The number of days from the current day for which log activity is included. Select the number of days from the list. You can go as far back as 365 days to view log activity.

User
The name of a specific user whose log activity you want to see. Select a user from the drop-down or select (All) to include all users in the report.

User Log Activity Reports

User Logon Activity

This report shows user logon activity over the last specified number of days. All logon activity and log off activity is included, whether done by the user or by the system. This includes all failed logons. Each activity record shows the logon/logoff activity, application details, UTC activity time stamps, and the primary application server, and client IP where the activity took place. The report header shows the total number of records in the report, and the filter criteria on the right side.

User Task Activity

This report shows user task activity over the last number of specified days. Each task record shows the task type and description and the task's completion percentage, UTC task activity time stamps, and the primary application server, and client IP where the task activity took place. The report header shows the total number of records in the report, and the filter criteria on the right side.

User Error Activity

This report shows user error activity over a specified number of days. Each error record shows the user who incurred the error, the time of the error, the application where the error occurred, and the error description. Application tier and the application server and version also display for each record. The report header shows the total number of records in the report, and the filter criteria on the right side.

Workflow & Entity Status Group

Reports in the Workflow & Entity Status report group provide various insights into the completion status of specific workflow entities. Each report displays the filtering criteria on the right side of the report header.

Workflow & Entity Status Group Report Filters

Workflow
The name of a workflow for which you want to view workflow status. Select a workflow from the list.

Scenario
The scenario within the specified workflow for which you want to view workflow status data.

Time
The month and year for which you want to view records in the report.

Completion Status
Specify the workflow completion statuses to include in the report. Select Complete, Incomplete, Has Errors, or select (All) to include all statuses in the report. Incomplete statuses include Not Started and InProcess statuses.

Workflow & Entity Status Reports

Entity & Workflow Status

A summary report that shows the workflow status for all entities in the specified top-level workflow. Entries in the report are grouped by entity. The calculation and workflow status display for each entity.

Workflow & Entity Status

A summary report that flips the data from the Entity & Workflow Status report. It shows the workflow status for all entities in the specified top-level workflow, along with the calculation status of each entity. Entries in this report are grouped by workflow.

Entity & Workflow Status (With Data Status)

A summary report that shows the workflow status for all entities (with data status) in the specified top-level workflow. Entries in this report are grouped by entity. For each entity, data statuses indicate whether stage and cube data has been loaded, and whether cube view or Microsoft Excel forms data exists.

Workflow & Entity Status (With Data Status)

A summary report that shows the workflow status for all entities (with data status) in the specified top-level workflow. The report is grouped by workflow.

Workflow & Entity Status (Current WF) Group

Reports in the Workflow & Entity Status (Current WF report group provide various insights into the completion status of the currently active workflow. Each report displays the filtering criteria on the right side of the report header.

Entity & Workflow Status (Current Workflow) Group Report Filters

Completion Status
Specify the workflow completion statuses to include in the report. Select Complete, Incomplete, Has Errors, or select (All) to include all statuses in the report. Incomplete statuses include Not Started and InProcess statuses.

Workflow & Entity Status (Current WF) Reports

Entity & Workflow Status (Current Workflow)

A summary report that shows the workflow status for all entities in the current workflow. This report is grouped by entity.

Workflow & Entity Status (Current Workflow)

This is a summary report that shows the workflow for all entities in the current workflow. The report is grouped by workflow.

Entity & Workflow Status (With Data Status)

A summary report that shows the workflow status for all entities (with data status) in the current workflow. This report is grouped by entity.

Workflow & Entity Status (With Data Status)

A summary report that shows the workflow status for all entities (with data status) in the current workflow. The report is grouped by workflow.

Workflow Channel Audit Group

Use the reports in the Workflow Channel Audit report group to see all activity related to your workflow channels during a specific date range. This includes information on when each workflow channel was created and deleted, and information on data that has been updated for workflow channels.

Each report in this group displays the report's filtering criteria on the right side of the report header, and the total number of records displays on the left side of the report header.

Workflow Channel Audit Group Report Filters

Workflow Channel

The workflow channel for which you want to see add, delete or update activity. Select a workflow channel from the list or select (All) to see activity for all workflow channels.

User

A user for which you want to see add, delete or update activity. Select a user from the list or select (All) to see activity for all users.

Start Date/End Date

Enter a start/end date range to include only workflow channel changes made within the specified time range on the report.

Workflow Channel Audit Reports

Workflow Channel Audit – Added

This report shows workflow channels added within a specified time range. You can filter the report to include all or a single workflow channel and user. For each workflow channel in the report the following information displays: the workflow channel name and description, the user who made the change, and the UTC time stamp of the change.

Workflow Channel Audit – Updated

This report shows data updated in workflow channels within a specified time range. You can filter the report to include all or a single workflow channel or user. For each workflow channel in the report the following information displays: the workflow channel name, the original and new value of the property that was changed, the user who made the change, and the UTC time stamp of the change.

Workflow Channel Audit – Deleted

This report shows data deleted from workflow channels within a specified time range. You can filter the report to include all or a single workflow channel or user. For each workflow channel in the report, the following information displays: the workflow channel name and description, the user who made the change, and the UTC time stamp of the change.

Workflow Commentary Group

Reports in the Workflow Commentary group provide details on data attachments (also known as comments) added to accounts in the currently selected workflow either at the cell level or to an entire data unit within a workflow. Reports show attachments by account within the workflow.

See also: *Data Attachments for Selected Cell/Data Unit* in the *OneStream XF Design and Reference Guide* for more information on data units.

Workflow Commentary Group Report Filters

Account

The account within the currently selected workflow. Any entity using the specified account that has an attachment displays in the report.

Attachment Type

Attachment Types are part of the View dimension, which makes them available for a variety of reporting and explanation needed within the information delivery process. This allows them to be included within Cube View results.

You can specify whether to see all attachments associated with an account. Select an attachment type from the list or select (All) to display all attachment types in the report.

Workflow Commentary Reports

Workflow Commentary Detail

This report lists all comments attached to the entities for the current workflow POV. Detailed POV information is listed for each comment. The report is grouped by entity, then by account. The report shows the selected account in each entity, and information for each entity includes cube view POV information, flow, IC, and user defined dimension type origin, along with a list of the comments. Information for each commentary includes the user who created the commentary and the time the commentary was created.

Workflow Commentary By Entity & Account

This is a list of all comments attached to the entities for the current workflow POV. This report is grouped by entity, then by account. Information for each commentary includes the user who created the commentary and the time the commentary was created.

Workflow Profile Audit Group

Use the reports in the Workflow Profile Audit report group to understand all data activity related to your workflow profiles. This includes information on when each workflow profile was created and updated, and information on deleted workflow profiles.

Each report in this group displays the report's filtering criteria on the right side of the report header, and the total number of records displays on the left side of the report header.

Workflow Profile Rights Group Report Filters

Workflow Profile
The name of a workflow profile.

Scenario Type
Select a scenario type from the list.

User
A user for which you want to see add, delete or update activity. Select a user from the list or select (All) to see activity for all users.

Start Date / End Date
Enter a start/end date range to include only workflow profile rights changes made within the specified time range in the report.

Workflow Profile Audit Reports

The following information applies to the Workflow Profile Audit reports:

- The Workflow Profile Audit – Updated reports show values that have been updated in the **New Value** column. Values that cannot be retrieved by the system display as (Unavailable Value) in the report. Values that display as (Unassigned) have been set back to their default value.
- For a (Default) scenario, setting a property back to its default value (Unassigned) creates an update record for the Workflow Profile Audit – Updated report.
- First-time changes made to properties in any scenario other than (Default) display on the Workflow Profile Audit - Added report. Subsequent changes to the same properties display on the Workflow Profile Audit – Updated report.
- For any scenario other than (Default), setting a property back to its default value creates a record in the Workflow Profile Audit – Deleted report to indicate the previous value was deleted.

Workflow Profile Audit – Added

This report shows data added to workflow profiles within a specified time range. You can filter the report to include all or a single workflow profile, scenario type, and user. For each workflow profile in the report the following information displays: the property that was changed, the changed value, the user who made the change, and the UTC time stamp of the change.

See also: Workflow Profile Audit – Updated

Workflow Profile Audit – Updated

This report shows data updated in workflow profiles within a specified time range. Updates made to any scenario display on the Workflow Profile Audit - Updated report. You can filter the report to include all or a single workflow profile, scenario type, and user. For each workflow profile in the report the following information displays: the property that was changed, the changed value, the user who made the change, and the UTC time stamp of the change.

> **Note**: Updating the **Profile Active** property that is not in the `(Default)` scenario from `True` to `False` creates a record that can be viewed in the Workflow Profile Audit – Deleted that indicates the `True` value was deleted. Changing this property from `False` back to `True` creates a record that can be viewed in the Workflow Profile Audit – Added report.

Workflow Profile Audit – Deleted

This report shows data deleted from workflow profiles within a specified time range. You can filter the report to include all or a single workflow profile, scenario type, and user. For each workflow profile in the report, the following information displays: the property that was changed, the changed value, the user who made the change, and the UTC time stamp of the change.

Workflow Profile Rights Group

The Workflow Profile Rights group contains a single report called Workflow Profile Rights.

Workflow Profile Rights Group Report Filters

User
The name of the user whose workflow profile rights you want to include in the report. This defaults to the user for the current session. Select a defined user from the list.

Execute Workflow, **Certify Workflow**, **Process Journals**, **Approve Journals**, **Post Journals**
These filters let you include/exclude records in the report based on whether the rights for the permission sets are set to Yes, No, or (Not Restricted). Use these filters to determine the profile rights permissions that display in the report.

- **Yes** = Show only records in the report where the entity's profile permission is **Yes**.
- **No** = Show only records in the report where the entity's profile permission is **No**.
- **(Not Restricted)** = Show all permission records (**Yes** and **No**)

- **Execute Workflow**: Specified user has workflow execution permission for the workflow profile.
- **Certify Workflow**: Specified user has certification permission for the workflow profile.
- **Process Journals**: Specified user can process journals in the workflow profile.
- **Approve Journals**: Specified user can approve journals in the workflow profile.
- **Post Journals**: Specified user can post journals to the workflow profile.

Workflow Profile Rights Reports

Workflow Profile Rights

This report shows the workflow permission rights for the specified user. For each cube, the report is sorted by workflow profile, then by profile property.

Workflow Profiles Rights By Type Group

A workflow profile is the basic building block of a workflow management structure. This includes a task list that should be performed by a group of users in relation to a group of entities. Common sets of task lists are known as workflow profile types.

Reports in this group show permission rights for users based on those workflow profile types.

Workflow Profile Rights By Type Group Report Filters

Workflow Profile Type
Select the workflow profile type to include permissions in the report.

See also:

- *Presentation* chapter of the *OneStream XF Design and Reference Guide* for more information and a listing of workflow profile types.
- *Using Workflow Profiles* section of the *OneStream XF Design and Reference Guide* for detailed descriptions of the workflow profile types

Scenario Type
Select a scenario type from the list for which you want to view profile rights in the report.

Execute Workflow, **Certify Workflow**, **Process Journals**, **Approve Journals**, **Post Journals**
These filters let you include/exclude records in the report based on whether the rights for the permission sets are set to Yes, No, or (Not Restricted). Use these filters to determine the profile rights permissions that display in the report.

- **Yes** = Show only records in the report where the entity's profile permission is **Yes**.
- **No** = Show only records in the report where the entity's profile permission is **No**.
- **(Not Restricted)** = Show all permission records (**Yes** and **No**).

- **Execute Workflow**: Specified user has workflow execution permission for the workflow profile.
- **Certify Workflow**: Specified user has certification permission for the workflow profile.
- **Process Journals**: Specified user can process journals in the workflow profile.
- **Approve Journals**: Specified user can approve journals in the workflow profile.
- **Post Journals**: Specified user can post journals to the workflow profile.

Workflow Profiles Rights By Type Reports

Workflow Profile Rights By Type

This report shows workflow rights for all users for the specified workflow profile type and scenario type within the workflow profile. The specified workflow profile type and scenario type display on the right side of the report header. The report displays users with workflow rights and their permission rights for each of the workflow profile types. For each workflow, data displays in alphabetical order by user ID.

Workflow Profile Rights Entities / No Admin

This report shows workflow rights for all non-Administrator users for the specified workflow profile type and scenario type within the workflow profile. The specified workflow profile type and scenario type display on the right side of the report header. The report displays users with workflow rights and their permission rights for each of the workflow profile types. For each workflow, data displays in alphabetical order by user ID.

Workflow Profiles Rights by User Group

The Workflow Profiles Rights by User report group contains a single report called Workflow Profiles Rights by User.

Workflow Profile Rights by User Group Report Filters

Workflow Profile
The name of a workflow profile in the current workflow. Only workflow profiles from the current workflow display in the list.

Scenario Type
Select a scenario type from the list for which you want to view profile rights in the report.

Execute Workflow, **Certify Workflow**, **Process Journals**, **Approve Journals**, **Post Journals**
These filters let you include/exclude records in the report based on whether the rights for the permission sets are set to Yes, No, or (Not Restricted). Use these filters to determine the profile rights permissions that display in the report.

- **Yes** = Show only records in the report where the entity's profile permission is **Yes**.
- **No** = Show only records in the report where the entity's profile permission is **No**.
- **(Not Restricted)** = Show all permission records (**Yes** and **No**)

- **Execute Workflow**: Specified user has workflow execution permission for the workflow profile.
- **Certify Workflow**: Specified user has certification permission for the workflow profile.
- **Process Journals**: Specified user can process journals in the workflow profile.
- **Approve Journals**: Specified user can approve journals in the workflow profile.
- **Post Journals**: Specified user can post journals to the workflow profile.

Workflow Profiles Rights by User Reports

Workflow Profile Rights By User

This report shows workflow rights for all users in the specified workflow profile. The report is grouped by workflow profile entity. Each workflow profile entity in the report lists the entity type and the cube to which it belongs.

Each entity listed displays all users with workflow rights on each line, that user's workflow profile rights for workflow execution, certification sign off, and if they have journal processing, approval, and posting rights.

Workflow Status Group

Reports in the Workflow Status Group provide status information for a selected workflow and various workflow profiles and entities belonging to a workflow.

Workflow Status Group Report Filters

Workflow

The name of a workflow for which you want to view workflow status. Select a workflow from the list.

Scenario

The scenario within the specified workflow for which you want to view workflow status data.

Time

The month and year for which you want to view records in the report.

Completion Status

Specify the workflow completion statuses to include in the report. Select Complete, Incomplete, or Has Errors, or select (All) to include all statuses in the report. Incomplete statuses include Not Started and InProcess statuses.

Workflow Status Reports

Workflow Status

This is an audit report that shows the completion status information for the workflow profiles and entities belonging to the specified top-level workflow. Each shows the completion status with the last executed step in the completion process, the time of the last completion status execution, and the completion percentage of the workflow profile or entity. If the workflow profile or entity status is Not Started, the last executed time defaults to 1/1/1900 12:00:00 AM.

Import Channel Status

This report is like the Workflow Status report but shows completion status of all import channel workflows under the specified top-level workflow.

Form Channel Status

Shows the status of all form channel workflows for the specified top-level workflow.

Journal Channel Status

Shows the status of all journal channel workflows for the specified top-level workflow.

Workflow Status (Current WF) Group

Reports in the Workflow Status (Current WF) group provide quick summaries of work progress done for the entities in the currently selected workflow.

Workflow Status (Current Workflow) Group Report Filters

There are no filters for this report group. Report data is for the currently selected workflow.

All reports in this report group show the current selected scenario and time period for the currently selected workflow on the right side of the report header.

Workflow Status (Current WF) Reports

Workflow Status (Current Workflow)

This report shows the completion status of all workflow profiles under the current workflow. For each workflow profile listed, the report shows the profile's completion status, the last step executed in the workflow profile, the time that step was executed, and the completion percentage.

Import Channel Status (Current Workflow)

This report shows the status of the child import channel workflow profiles for the currently selected workflow. For each import channel listed, the report shows the completion status, the last step executed in the import channel, the time that step was executed, and the completion percentage.

See Also: *Managing Sibling Imports* section in the *Workflow Guides* chapter of the *OneStream XF Design and Reference Guide* for more information about import channels.

Form Channel Status (Current Workflow)

This report shows the status of all form channel workflow profiles for the current workflow. For each form channel listed, the report shows the completion status, the last step executed in the form channel, the time that step was executed, and the completion percentage.

Journal Channel Status (Current Workflow)

This report shows the status of all journals for the current workflow. For each journal listed, the report shows the completion status, the last step executed in the journal, the time that step was executed, and the completion percentage.

Help & Miscellaneous Information

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.

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: RPTA_PV6.1.0_SV100_PackageContents.zip

Identifier	Description
RPTA	Solution ID
PV6.1.0	Minimum XF Platform version required to run solution
SV100	Solution version
PackageContents	File name

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. 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. After the development application is created, install the solution and begin design. The following process properly migrates the solution tables properly.

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

1. In the production OneStream XF application, install the solution and create the data tables. See Configure the OneStream XF Application Server for Database Server Connection settings and installation details.
2. Data tables were created in the OneStream XF development application during the solution installation. Copy the data from the tables to the production Microsoft SQL Server Database using the Microsoft SQL Migration Utility. This utility should only be run by the Microsoft SQL Administrator.

   The Microsoft SQL Migration Utility and instructions can be downloaded online from: https://sqlazuremw.codeplex.com

! **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.