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Standard System Reports (RPTS)

This guide describes the necessary steps to install the OneStream XF Standard System Reports Solution.

Overview of Standard System Reports

The OneStream Standard System Reports *(RPTS)* Solution is a set of predefined System Dashboards that can be imported into any OneStream application and used for basic system reporting.
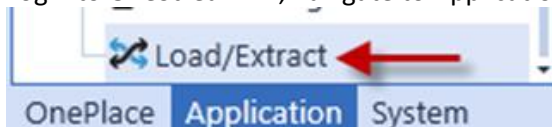
Standard System Reports Setup

How to Install RPTS

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

Download the Standard System Reports Solution from the XF MarketPlace. The package is a zip file named *RPTS_PVxxx_SVzzz_PackageContents.zip* where xxx and zzz represent version numbers for OneStream XF and the solution. The *PVxxx* number (e.g. 430) represents the minimum XF Platform Version (e.g. 4.3.0) required in order to implement this Solution Version (i.e. *SVxxx*).
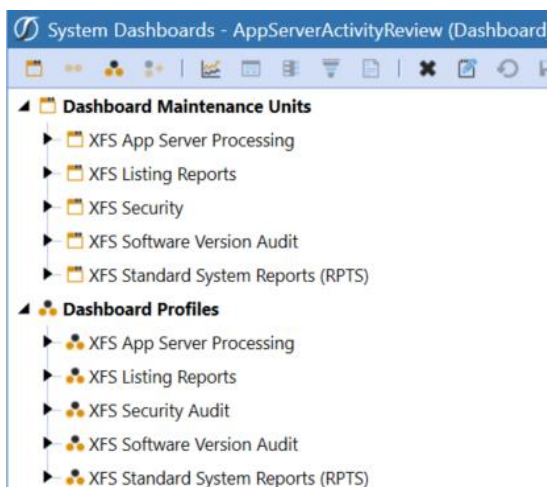
Log into OneStream XF, navigate to Application Tab | Tools | Load/Extract.

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

How to Manually Remove Previous Versions of RPTS

The previously installed release of the Standard System Reports (RPTS) will not be overwritten with the upgrade of RPTS. So, the old Dashboard Profiles and Dashboard Maintenance Units for XFS App Server Processing, XFS Listing Reports, XFS Security Audit and XFS Software Version Audit will still be displayed. These can be manually removed by System Administrators if desired. This is done by deleting the desired Dashboard Profile, the individual Dashboard Components in the related Maintenance Unit and then the related Maintenance Unit.

Package Contents

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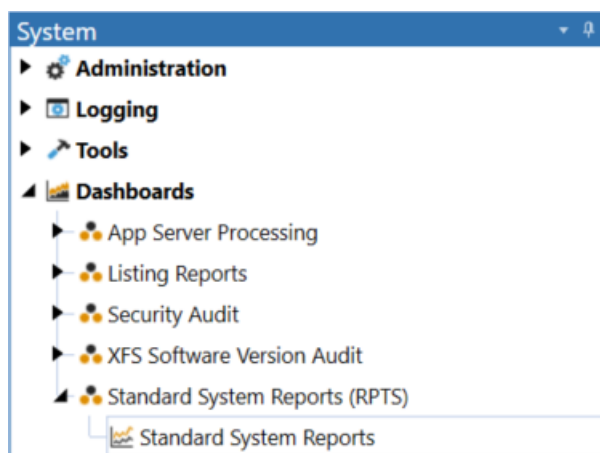
Dashboard Maintenance Unit

XFW Standard System Reports (RPTS)
This is Dashboard Maintenance Unit that provides the user interface for the Standard System Reports solution. It includes the Dashboard Groups, Components, Data Adapters, Parameters and Files used to build the solution.
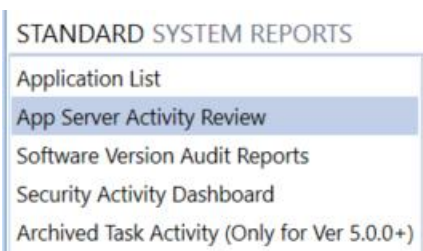
Using Standard System Reports Dashboard -

System Dashboards are predefined Dashboard Workspaces that provide information about the system such as the server, application and security. To access these System Dashboards, navigate to Dashboards under the System Tab.

The new RPTS Dashboard will be displayed in the *Standard System Reports (RPTS)* Dashboard Maintenance Unit.

Select the new *Standard System Reports (RPTS)* Dashboard and click the Show Reporting Page Button - to initialize the Dashboard. The new Standard System Reports list will be displayed.

Select the Report to run. The *App Server Activity Review* and the *Software Version Audit Reports* will run for the selected number of days for the audit review.

Note: *Archived Task Activity (Only for Ver 5.0.0+)* will only work in OneStream XF application environments of version 5.0.0 or higher.

Optimal Display Settings

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

Modifying MarketPlace Solutions

A few cautions and disclaimers when modifying a MarketPlace Solution:

- Major changes to Business Rules or custom tables within a MarketPlace Solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any Dashboard object or Business Rule, first copy the items to be modified to a separate Dashboard Maintenance Unit and then simply reference these items by the commercial MarketPlace solution. Document the references being made for your records. 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. This will help reduce upgrade efforts to reestablishing references to the customized components.
- 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.