



Guided Reporting Solution Guide

PV600 SV100

Copyright © 2022 OneStream Software LLC. All rights reserved.

Any warranty with respect to the software or its functionality will be expressly given in the Subscription License Agreement or Software License and Services Agreement between OneStream and the warrantee. This document does not itself constitute a representation or warranty with respect to the software or any related matter.

OneStream Software, OneStream, Extensible Dimensionality and the OneStream logo are trademarks of OneStream Software LLC in the United States and other countries. Microsoft, Microsoft Azure, Microsoft Office, Windows, Windows Server, Excel, .NET Framework, Internet Explorer, Internet Information Server, Windows Communication Foundation and SQL Server are registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. DevExpress is a registered trademark of Developer Express, Inc. Cisco is a registered trademark of Cisco Systems, Inc. Intel is a trademark of Intel Corporation. AMD64 is a trademark of Advanced Micro Devices, Inc. Other names may be trademarks of their respective owners.

Table of Contents

Overview	1
Setup and Installation	2
Dependencies	2
Application Server Settings	2
Configure the OneStream Application Server	2
Install Guided Reporting	4
Set Up Guided Reporting	5
Create Tables	5
Package Contents	5
Settings	6
Global Parameters	6
User Preferences	8
Home Page Behavior when Auto Update is Disabled	9
Uninstall	11
Dashboard	12
Report Management	13
Security	13
Report Groups	14
Create a Report Group	14

Table of Contents

Reports	15
Add a Dashboard Report	15
Add a Cube View Report	16
Discover Parameters from Cube View Reports	17
Home Page	26
Set Report Options and Filters	28
Select Parameters	29
Change Parameter Selections	31
User Interface for Shared Parameters Sets	32
Use Reports with Parameters from Cube View Templates	34
Help and Miscellaneous Information	35
Display Settings	35
Package Contents and Naming Conventions	35
Solution Database Migration Advice	36
MarketPlace Solution Modification Considerations	37
Appendix: Additional Parameter Details	38
Parameter Types Available from the Discover Process	38
Discover Process for Cube View Templates Using Additional Parameters	39

Overview

The Guided Reporting Solution provides business users with an intuitive and easy to use report viewing experience.

This solution provides:

- A framework for dynamically integrating customer data content into a report viewer workspace for dashboards or cube views as structured within the organization.
- Reports that are tailored to the data available for the specific parameter filters set by the business user across any dimension type.
- The ability to use custom reporting without the need for extra maintenance or duplicating templates.
- Security setting features on a report group and an individual report level which provides additional flexibility needed for any report viewing experience.

Setup and Installation

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

Dependencies

Component	Description
OneStream 6.0.0 or later	Minimum OneStreamPlatform version required to install this version of Guided Reporting.
OneStreamApp for Windows	Guided Reporting is optimized for the OneStream Application for Windows which has all the functionality as the browser-based version of OneStream.

Application Server Settings

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

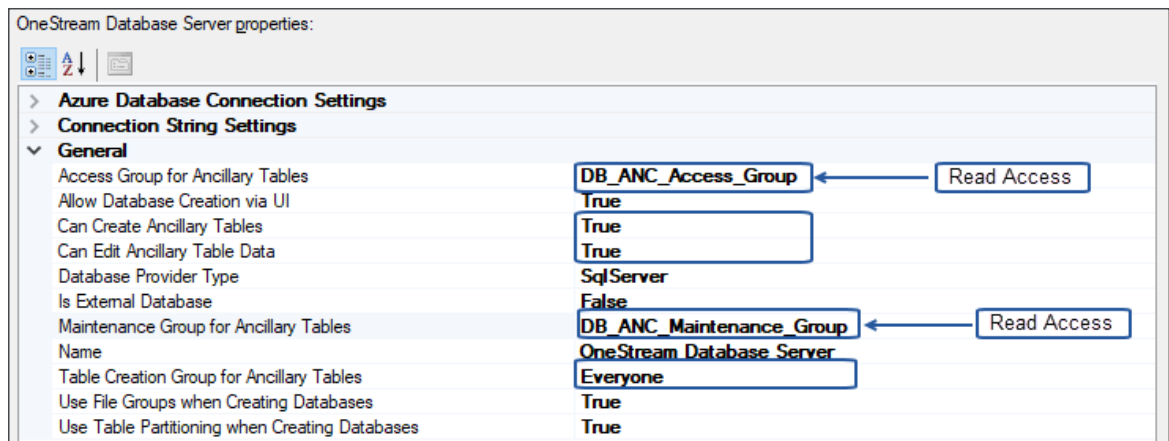
Configure the OneStream Application Server

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

Setup and Installation

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

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



4. Restart Internet Information Server.

Install Guided Reporting

NOTE: You must have administrator security level permissions for the Guided Reporting setup and reporting options to be established.

1. On the OneStream MarketPlace Dashboard, click **MarketPlace > Guided Reporting**.

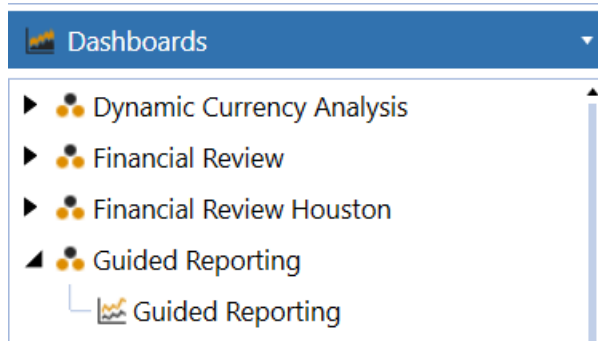


2. On the Guided Reporting solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and then click **Download**.
4. Log in to OneStream.
5. On the **Application**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

Set Up Guided Reporting

The first time you run Guided Reporting, a guided table setup process begins.

In OneStream, click **OnePlace > Dashboards > Guided Reporting > Guided Reporting**.



Create Tables

1. Click **Step 1: Create Tables**

This step may be necessary when upgrading even if tables already exist. Guided Reporting will not drop any tables that already exist but will modify table structures and add new ones if necessary.

2. When setup is complete, click **Step 2: Launch Solution** to open Guided Reporting.

Package Contents

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

Settings

To access the **Settings** page, click **Show Settings Page**.



NOTE: In the Settings page, administrators have access to all functionality while non-administrators can access User Preferences only.

Global Parameters

The Global Options tab allows you to identify which parameters to set up as a Global view within the Global Parameter Definition table. By setting global parameters, a Global view bar displays on the Home page in which you can use those assigned parameters across multiple Cube View reports.

Global parameters display on multiple Cube View reports as long as that parameter is being used on that report.

You can also set the list label and the default value of the global parameter.

If the List Label is blank, the name of the parameter on the Home page reflects the Parameter Name in the Global Parameter Definition table by default. If the List Label is populated, the name placed in that column overrides the Parameter Name on the Home page.

Settings

If the Default Value of a parameter is blank, you will see *No Selection* on that parameter on the Home page. The parameter going forward uses the last selection chosen for current and future sessions. If the Default Value of a parameter is populated, the parameter on the Home page reflects the default value populated in the Global Parameter Definition table and the report renders based on the default value defined. If the value is changed at any time, the last selection chosen remains for current and future sessions.

After you save, the Parameter Name, List Label, and Default Value columns become read-only. Edit Global View Order at any time.

Global Parameter Definition			
Parameter Name	List Label	Default Value	Global View Order
ParamTime	Time	2022M3	5
WorkflowEntityPrompt	Entity	Houston Heights	10

Global View Order

Apply the sort order in the Global Parameter Definition table in the **Global View Order** column. The global view order assigned retains its setting on the Home page.

If the Global View Order column is not used and left blank, the default sort order for the dimensions is the order of the POV (cube, entity, parent, consolidation, scenario, and so on).

When an administrator adds a new parameter as part of the initial setup or includes additional parameters to an existing list on the Global Definition Table and clicks **Save**, a validation displays stating *Changes made to the Global Definition table will be captured during a discover or rediscover process*.

This validation alerts the administrator that any changes made to the Global Definition Table will be available on the Home page of the individual Cube View reports after the Discover process completes. If you already ran a Discover process for a cube view, clicking it again reflects any changes made to parameters in the cube view itself or in the Global Parameter Table.

NOTE: For more information about cube views, the Selector List behavior, and the Discover process, see ["Discover Parameters from Cube View Reports" on page 17](#).

User Preferences

When the Auto Update feature is enabled, the Cube View report automatically updates as each parameter is populated on the Home page.

This feature provides flexibility to establish how you would prefer to interact with cube view parameters and report updates within the Home page and can be modified at any time.

To access the Auto Update feature:

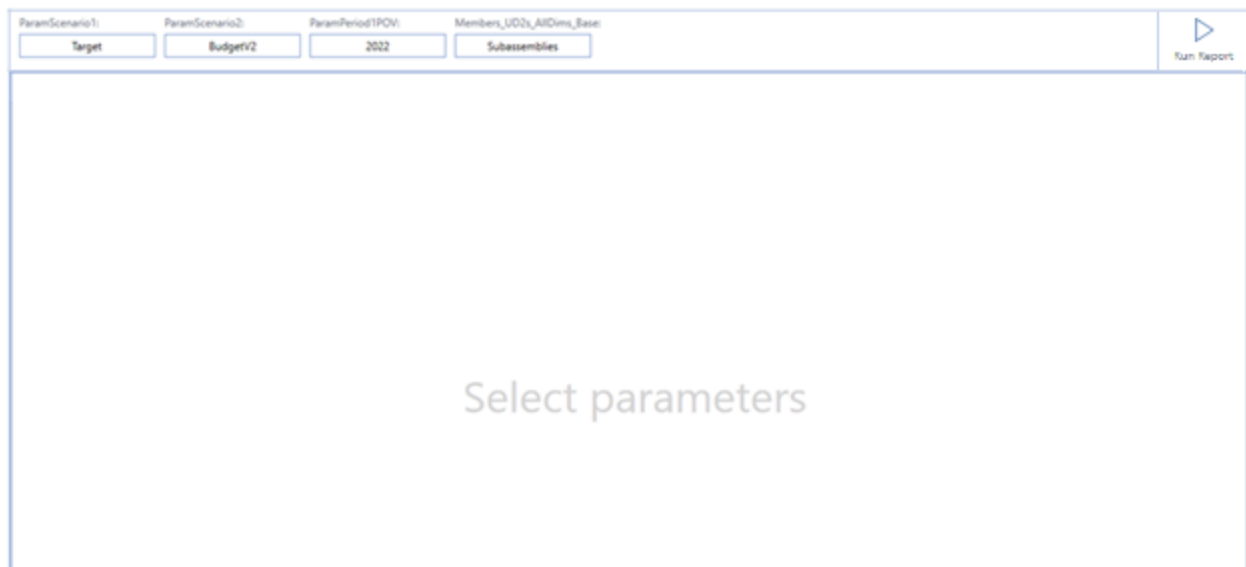
1. On the Settings page, click **User Preferences**.
2. Click **Auto Update Parameter Filters**. This setting is selected by default.

When the Auto Update box is selected, and you are viewing the report for the first time, *Select parameters* text is shown as a reminder to select all of the parameters. When the last parameter is selected, the report automatically displays based on your selections.

When the Auto Update box is selected, and you have already viewed the report, the cube view displays immediately using the last filters selected on the parameters.

Home Page Behavior when Auto Update is Disabled

When the Auto Update box is unchecked, a Run Report button displays in the Selector List view on the Home page. If you are viewing the report for the first time, you will see *Select parameters* in gray text below the parameters as a reminder to make your selections.



The screenshot shows the top section of the Home page interface. It features four input fields for parameters: 'ParamScenario1' with the value 'Target', 'ParamScenario2' with the value 'BudgetV2', 'ParamPeriod1POV' with the value '2022', and 'Members_UDOs_AltDims_Base' with the value 'Subassemblies'. To the right of these fields is a 'Run Report' button with a play icon. Below the parameter fields is a large rectangular area containing the text 'Select parameters' in a light gray font, indicating that the user must select parameters before running the report.

After the initial run, if additional changes are made to the parameters you will see gray text where the cube view was, *Run Report for Modified Parameters*.

Settings

Time 2022M2	Entity Houston Heights	Run Report
Products Parts		

Run Report for Modified Parameters

This is a reminder to run the changes after all filters are populated. When you click **Run Report**, the cube view displays with the updated changes to the parameter filters.

ParamScenario1:	ParamScenario2:	ParamPeriod1POV:	Members_UDOs_AltDims_Base:	
Target	BudgetV2	2022	Subassemblies	Run Report

Income Statement				
	2022 Target	2022 BudgetV2	2022 Variance	
60000 - Operating Sales	1,212,138	1,186,804	25,334	
60200 - Returns & Allowances	303,800	297,450	6,350	
60999 - Net Sales	908,339	889,354	18,985	
41000 - Operating Cost of Goods Sold	645,200	658,149	-12,949	
42000 - IC Cost of Goods Sold	39,458	41,184	-1,726	
43000 - Cost of Goods Sold	684,659	699,333	-14,675	
61000 - Gross Margin	223,680	190,021	33,659	
54400 - Total Operating Exp Before Allocation				
54350 - Total Allocations				
54500 - Total Operating Expenses				
62000 - Total Operating Income	223,680	190,021	33,659	
62999 - Total Other Income (Expense)				
63000 - Earnings Before Interest and Taxes	223,680	190,021	33,659	
64000 - Earnings Before Taxes	223,680	190,021	33,659	
56999 - Total Income Taxes				
69000 - Net Income	223,680	190,021	33,659	

Uninstall

The Uninstall feature allows you to uninstall the Guided Reporting user interface or the entire solution.

There are two uninstall options:

1. **Uninstall UI** removes Guided Reporting, including related dashboards and business rules but leaves the database and related tables in place. For some releases, perform this step before accepting any new version of Guided Reporting because some of the dashboards or other objects may have been modified.
 - Choose this option to accept a Guided Reporting update without removing the data tables.
 - The Guided Reporting Release Notes indicate if an overinstall is supported.
2. **Uninstall Full** removes all the related data tables, all data, Guided Reporting dashboards, and Business Rules.
 - Choose this option to completely remove Guided Reporting or to perform an upgrade that is so significant in its changes to the data tables that this method is required. Only business rules deployed on Guided Reporting during setup and installation are removed.

CAUTION: Uninstall procedures are irreversible.

Dashboard

Guided Reporting provides one dashboard that shows the Guided Reporting main icons based on permission level.

The following users have access to the dashboard components:

- **Home page:** Administrators and non-administrators
- **Report Management page:** Administrators only
- **Settings > Global Options:** Administrators only
- **Settings > User Preferences:** Administrators and non-administrators
- **Settings > Uninstall:** Administrators only
- **Help page:** Administrators and non-administrators

Report Management

The Report Management page is designed to streamline administrative activities needed for the setup of Guided Reporting. Here an administrator can create Report Groups, assign Cube View or Dashboard reports within them, apply security, and discover parameters used in a Cube View report to view them through the Selector List view table.

To access the Report Management page, click **Report Management** page.



Security

When you create Report Groups and Reports in the Report Management page, you can set the Access group for each section from the Access Group drop-down list. The drop-down list reflects the options found in the **System > Security > Groups** section of OneStream.

NOTE: Access Group columns always default to **Everyone**.

In the example below, the FinRptg report group has an Access Group set to Power Users and there are individual reports set to Everyone and GolfStream Controllers. Even though some reports are set to Everyone, the Report Group takes priority for first pass security. If you are not part of the Power Users group, you will not be able to access the report group of FinRptg on the Home page and accessibility to the individual reports set to Everyone is not available.

Report Management

Report Groups			Reports						
Display Name	Description	Access Group	Display Name	Type	Dashboard Name	Cube View Name	Access Group	Enabled	Display Order
AdminRptg		Administrators	Income Statement	Cube View	(Unassigned)	Income Statement	Everyone	■	10
FinRptg		Power Users	Balance Sheet	Cube View	(Unassigned)	Balance Sheet	Everyone	■	20
			Controller Workspace	Dashboard	Q_Frame_Cnt_OnePlace_AltSe2 (Cont	(Unassigned)	Golfstream Controllers	■	30
			Sales Details	Dashboard	Sales Details Dashboard	(Unassigned)	Everyone	■	40
			OpEx Details	Dashboard	Opex Details Dashboard (Opex Details	(Unassigned)	Everyone	■	50

Report Groups

The Report Groups table allows an administrator the flexibility to create groupings of reports based on categories or access groups.

Create a Report Group

1. Click **Insert Row**.
2. Enter a **Display Name**, which is the name for the report group that will appear on the Home page. The Display Name is a required field that must be unique and can contain up to 50 characters.
3. Enter a **Description**, which is a descriptive name for the report group. The Description field may contain up to 200 characters and is optional.
4. Select an **Access Group**. Assign the Access Group based on **System > Security > Group** settings for the Report Group.
5. Click **Save**.

NOTE: You must save the report group before you can add reports.

Reports

You can incorporate previously created Dashboard or Cube View reports into Guided Reporting in a simplified way.

Each report group can contain multiple reports in which each report can have individualized security groups assigned.

NOTE: You can create a duplicate display name for a report that is in a different report group.

Add a Dashboard Report

You can add a Dashboard report to a report group. Each report has its own Access Group settings.

1. Select a Report Group from the Report Groups list.
2. In the Reports section, click **Insert Row** to add a report.
3. In Display Name, enter the name of the report. This is the name you will see on the Home page.
4. In Type, select **Dashboard**.
5. In Dashboard Name, select a dashboard from the list of all dashboards available in OneStream.
6. Assign the Access Group, which is based on the **System > Security > Group** setting.
7. **Enabled:** If selected, you will see the report on the Home page. It is selected by default.

8. **Display Order:** Order in which you can select the reports from a list view within the Report Group.

NOTE: If the default remains at 10, reports on the Home page will be in alphabetical order.

1. Click **Save**.

A Dashboard report will be part of the Report Group.

Add a Cube View Report

You can add a Cube View report to a report group. Each report has its own Access Group settings.

1. Select a Report Group from the Report Groups list.
2. In Reports, click **Insert Row** to add a report.
3. In Display Name, enter the name of the report.
4. In Type, select **Cube View**.
5. In Cube View Name, select a cube view from the list of all cube views available in OneStream.
6. Assign the Access Group, which is based on the **System > Security > Group** setting.
7. **Enabled:** If selected, you will see the report on the Home page. It is selected by default.

8. **Display Order:** Order in which you can select the reports from a list view within the Report Group.

NOTE: If the default remains at 10, reports on the Home page will be in alphabetical order.

1. Click **Save**.

A Cube View report will be part of the Report Group.

2. Go to "[Discover Parameters from Cube View Reports](#)" below.

Discover Parameters from Cube View Reports

When Cube View reports are added to a report group, you can view parameters and their respective setups in the Selector List and Parameter Details table of the Report Management page. For these to appear, see "[Discover Parameters](#)" below.

Discover Parameters

To view parameters in a cube view report, ensure a cube view report is selected in the Reports section. Once its selected, you see a Discover icon located in the table below. Clicking on this icon initiates a job that gathers parameters used in various areas of a cube view report, compiles them into a Selector List table, and provides information on how those parameters render on the Home page.

IMPORTANT: You must click the Discover icon for cube view reports for you to interface with the cube view on the Home page.

Report Management

The image below shows the *Perform Discovery of Parameters* prompt that displays after you first create a cube view.

The screenshot displays the 'Report Management' interface. It features two main tables: 'Report Groups' and 'Reports'. The 'Report Groups' table has columns for Display Name, Description, and Access Group. The 'Reports' table has columns for Display Name, Type, Dashboard Name, Cube View Name, Access Group, Enabled, and Display Order. Below these tables, a large blue box contains the text 'Perform Discovery of Parameters'.

Display Name	Description	Access Group
AdminPkg		Administrators
ReportGroup1		Power Users
ReportGroup3		Everyone

Display Name	Type	Dashboard Name	Cube View Name	Access Group	Enabled	Display Order
Income Statement	Cube View	(unassigned)	Income Statement	Everyone	☒	10
Balance Sheet	Cube View	(unassigned)	Balance Sheet	Everyone	☒	20
Controller Workspace	Dashboard	0_Frame_Ctrl_OnePlace_AWSt2 (Cont	(unassigned)	Goldstream Controllers	☒	30
Sales Details	Dashboard	Sales Details Dashboard	(unassigned)	Everyone	☒	40
OpEx Details	Dashboard	Opex Details Dashboard (Opex Details	(unassigned)	Everyone	☒	50

1. In the Reports list, select a cube view and click **Discover**. OneStream scans the parameters assigned to the selected cube view and populates the Selector List table. The Selector Lists table opens.

The screenshot shows the 'Selector List' table, which is populated with parameters. The table has columns for Parameters, List Label, Default Value, Home Page Interface, and Selector List View Order. The 'Parameters' column lists various system parameters, and the 'Selector List View Order' column shows their respective order values.

Parameters	List Label	Default Value	Home Page Interface	Selector List View Order
ColumnSet		None		10
Default_options		None		10
Default_header		None		10
Members_LOD2_AltDims_Base		Selector List View		10
ParamPeriodPOV		Selector List View		10
ParamPeriodPOV		Selector List View		10
ParamScenario1		Selector List View		10
ParamScenario2		Selector List View		10
ParamTime		Global View		10
WorkRouteOnlyPrompt		Global View		10

NOTE: If you add parameters to the cube view and then click **Discover** the new parameters display in this list. If you delete a parameter from a cube view, you must perform the Discover process again for it to be removed from the Home page selections.

2. View or populate the Selector List properties:

- **Parameter:** Populated based on parameters assigned to the cube view.
- **List Label:** When you populate the label, it updates on the Home page. If you do not populate this value, the Home page displays the parameter name.
- **Default Value:** If assigned, this is the first filter shown by default on the Home page. If you do not populate this value, the Home page displays *No Selection*.
- **Home Page Interface:** Indicates if the parameter is set in the Global view, Selector List, or None. The Discover process not only identifies parameters that are being used in the cube view, it also scans the Global Parameter Definition table to identify what parameters (if any) are being used as a global parameter. If none are used, the default is Selector List view or None.
- **Selector List View Order:** As an administrator, you have the flexibility to choose the order in which parameters display on the Home page. Apply the sort order in the Selector List table on the Cube View reports in the **Selector List View Order** column. The sort order assigned is retained on the Home page. If the Selector List View Order column is unchanged, the default sort order for the dimensions is the order of the POV (cube, entity, scenario, and so on).

NOTE: Apply the sort order of the parameter in its designated area of the Home page. If you apply the sort order of a Global View item on the Selector List View Order column, you receive a message that redirects you to the Global Parameter Definition table and your modifications on that global parameter are not saved.

3. If you highlight a Cube View report and click **Discover** again, the list of parameters updates to reflect additions, removals, or updates of parameters made to the cube view.

The right pane resets to the *Select Parameter* prompt.
4. Go to "[View Parameter Details](#)" on the next page.

NOTE: If you go back to Reports and replace a cube view name on a Cube View report you have already saved, the Selector List resets to *Perform Discovery of Parameters*.

NOTE: When you click **Discover**, the original cube view name is removed from the Dynamic Dashboard group and those changes are dynamically updated through the parameter.

Home Page Interface Assignments within the Selector List

The Discover process determines if a parameter name matches the parameter name in the Global Parameter Definition table. If it exists in the table, the default for the Home page on the Selector List is Global view and if it does not exist in the table, the default is Selector List view.

If you click **Discover** again, the default Discover process begins. If the parameter no longer exists in the Global Parameter Definition table, and is still being used in the cube view, the Home page updates to the Selector List view for that parameter.

You can override the Global view and assign a parameter to the Selector List view in a specific Cube View report. If you choose to change the Global view parameter to Selector List view, then anything populated as the List Label and Default Value for that Global view parameter overrides what is in the Global Options table. To change a Selector List view to a Global view, navigate to the Global Parameter Table and add that parameter.

NOTE: If you chose not to update the Global Parameter Table to include a new parameter, the change of a Home page interface from Global view to Selector List view on a parameter resets back to Global view when you run the Discover process on a Cube View report. For the Home page interface on a parameter to change from a Selector List view to a Global view, you must add the parameter in the Global Parameter Definition Table.

See ["Home Page" on page 26](#) for more information.

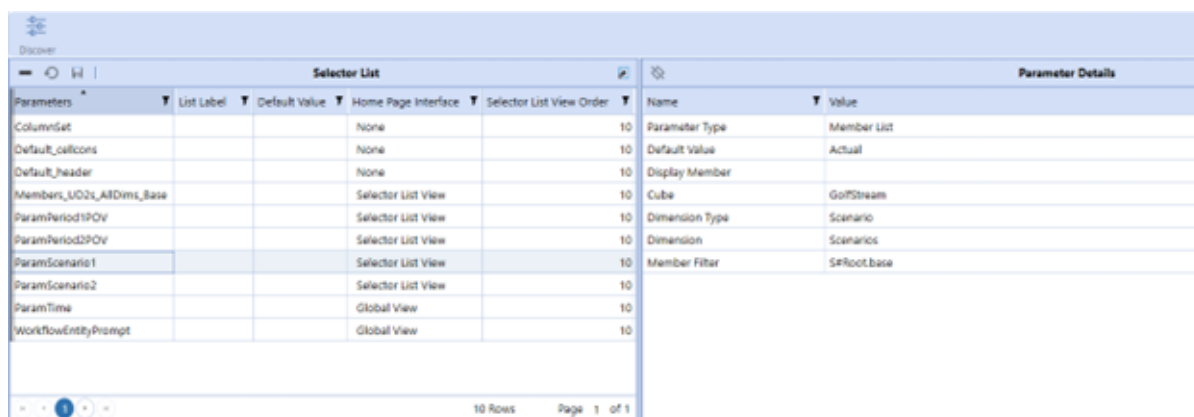
View Parameter Details

In Selector List, select a parameter to view the details established upon creation. Any changes made to the parameter details on the Application tab are automatically updated in the Parameter Details section of Guided Reporting without the need to click Discover again.

This information is read-only, but it tells you what information is included in the report for this parameter.

The default value of a parameter is the initial view for the parameter filter. When the default value of a parameter is modified, the next time the parameter is viewed it will use the last value selected and not the default value that was initially displayed.

You can choose to use a different default value than what is listed in the Parameter Details by using the Default Value column within the Selector List table on the left.



Selector List					Parameter Details	
Parameters	List Label	Default Value	Home Page Interface	Selector List View Order	Name	Value
ColumnSet			None	10	Parameter Type	Member List
Default_cellcons			None	10	Default Value	Actual
Default_header			None	10	Display Member	
Members_UD2i_AllDims_Base			Selector List View	10	Cube	GolfStream
ParamPeriod1POV			Selector List View	10	Dimension Type	Scenario
ParamPeriod2POV			Selector List View	10	Dimension	Scenarios
ParamScenario1			Selector List View	10	Member Filter	Selfroot.base
ParamScenario2			Selector List View	10		
ParamTime			Global View	10		
WorkflowEntityPrompt			Global View	10		

Where Parameters are Discovered

After you click **Discover**, parameters are found in these areas of a cube view:

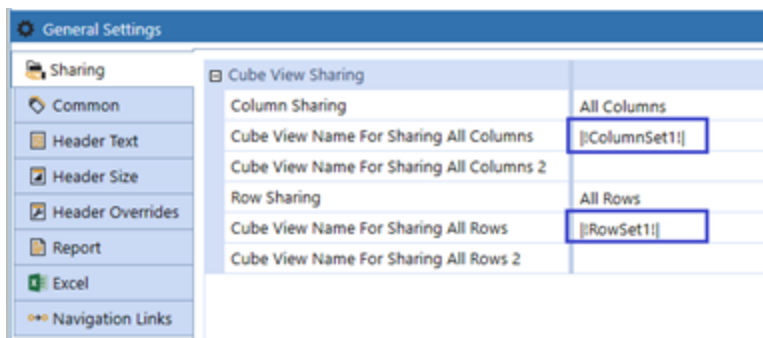
- Cube View > POV
- Cube View > General Settings > Sharing
 - If row or column is sharing a cube view, the Discover process searches for parameters in that cube view in the Member filter area of the shared cube view.
 - If row or column is sharing a parameter, up to two parameters can be used for row set or column set and will appear in a different area of the Home page.
 - If a row or column set parameter has a cube view that is using additional parameters, the parameters shown in the Member Filters section of that cube view are also included in the Global or Selector List view of the Home page. See ["Discover Process for Cube View Templates Using Additional Parameters"](#) on [page 39](#) for more information.

- Cube View > Rows and Columns > Member Filters > Row
- Cube View > Rows and Columns > Member Filters > Column

Discover Process for Shared Column and Row Sets

The Discover process includes the following shared column and row set parameters.

- **Discover column and row sets:** Any shared parameters on the column or row set are part of the Discover process and display in the Selector List table. The search includes an option to select up to two column parameters and two row parameters if they are in the **Cube View Sharing** section of the cube view.



- **Discover column or row sharing for the cube view:** Any cube view under the **Column Sharing** section or **Row Sharing** section of a cube view prompts the discover and rediscover process to go one level deeper and return any parameters listed in the Member Filters section of the columns or rows.

Report Management

The screenshot shows the 'General Settings' dialog box with the 'Cube View Sharing' section expanded. The 'Column Sharing' is set to 'All Columns' and the 'Row Sharing' is set to 'All Rows'. The 'Cube View Name For Sharing All Rows' is highlighted with a red box and contains the text 'Rows_Income Statement'.

Cube View Sharing	
Column Sharing	All Columns
Cube View Name For Sharing All Columns	ColumnSet
Cube View Name For Sharing All Columns 2	
Row Sharing	All Rows
Cube View Name For Sharing All Rows	Rows_Income Statement
Cube View Name For Sharing All Rows 2	

Those also appear in the Selector List table. The search includes an option to select up to two column sets or row sets if they are in the cube view.

The screenshot shows the 'Designer' window with the 'Rows and Columns' section expanded. The 'Layout' tab is selected, showing a table with columns 'Default' and 'Time'. The 'Member Filters' tab is also visible, showing a table with columns 'Row' and 'Column'.

Default	Time
Net Sales_D	9,999.99
Net Sales_T	9,999.99
COGS_D	9,999.99
COGS_T	9,999.99
Gross Income_T	9,999.99

Row	Column
Account	Time
(Not Used)	(Not Used)
(Not Used)	(Not Used)
(Not Used)	(Not Used)

- Column and row sets on the Home page: See ["User Interface for Shared Parameters Sets"](#) on page 32.

Parameters for Member Filters

Parameters assigned in the Member Filters section of a cube view for rows and columns are included in the Discover process and appear in the Selector List table with the default of Global view or Selector List view.

Delete a Row

From the Selector List table, if you click **Delete Row** and then **Save**, the parameter is removed and will not be available on the Home page. Removing the parameter from the Selector List does not remove the parameter from the cube view itself.

If you rediscover, the parameter will redisplay in the Selector List table.

Home Page

The Home page interface of Guided Reporting offers dynamic views of the established report groups and reports as set by the administrator. This includes accessibility of what you are permitted to see as each report group can be established for a variety of viewing purposes. The options to select from are a reflection of how your cube view or dashboard are established in your application, as well as any additional setup for labels and default values within the solution itself.

Guided Reporting is designed to provide parameters in a Global view or a Selector List view for you to work with and reference when reviewing chosen filters.

On the Guided Reporting Home page you can do the following:

- Select report groups
- Select reports
- Review Dashboard reports
- Define parameters available for selected Cube View reports (global parameters, selector list view parameters, shared column or row set parameters)

Below is an image that represents a cube view that is using global and selector list parameters as well as a shared column set parameter.

Home Page

The screenshot displays the 'GUIDED REPORTING ANALYSIS' interface. The 'Define Global Parameter' section at the top shows 'WorkflowEntityPrompt' set to 'Total GolfStream' and 'ParamTime' set to '2022M2'. Below this, the 'Report Options' section shows 'Members_UDOs_AltDims_Base' set to 'Subassemblies'. The main area displays an 'Income Statement' report for 'Feb 2022' and 'Feb 2021'. The report includes a list of line items with their respective values for the two periods. A left sidebar contains a 'Report Groups' list with 'FinRptg' selected, and a 'Column Set To' dropdown set to 'Same Period Last Year'.

	Feb 2022	Feb 2021
60000 - Operating Sales	229,704	222,047
60200 - Returns & Allowances	57,571	55,652
60999 - Net Sales	172,133	166,395
41000 - Operating Cost of Goods Sold	133,281	128,838
42000 - IC Cost of Goods Sold	28,080	0
43000 - Cost of Goods Sold	161,361	128,838
61000 - Gross Margin	10,772	37,557
54400 - Total Operating Exp Before Allocation		
54350 - Total Allocations		
54500 - Total Operating Expenses		
62000 - Total Operating Income	10,772	37,557
62999 - Total Other Income (Expense)		
63000 - Earnings Before Interest and Taxes	10,772	37,557
64000 - Earnings Before Taxes	10,772	37,557
56999 - Total Income Taxes		
69000 - Net Income	10,772	37,557

The Define Global Parameter Header and the Global Parameter bar only display on the Home page if the Global Parameter Definition table is used.

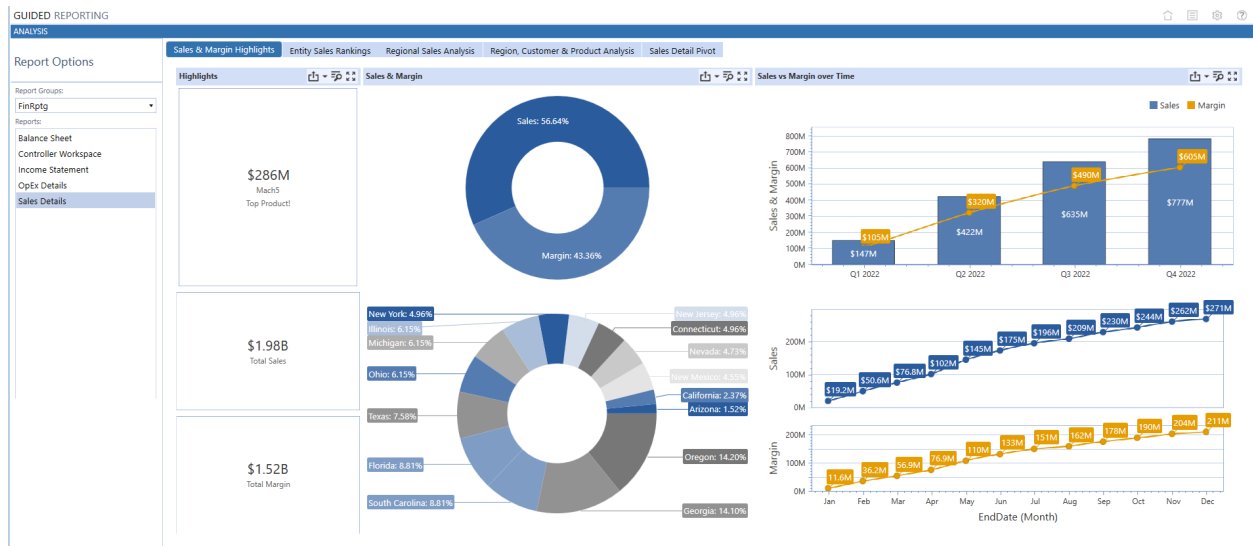
If the Global Parameter Definition table is being used, the Home page will reflect as such if the Cube View report is using those parameters in the Global view.

NOTE: The Global Parameter Definition table is used for Cube View reports only. There is no impact on this table for Dashboard report types.

When you toggle between report groups and reports, the right side of the Home page updates with a new cube view or dashboard based on new filtered selections.

Home Page

Below is an example of how a Dashboard report would render. Notice that the global parameter bar and selector list bar are not present. If parameters are defined and used in a Dashboard report, they remain within that dashboard itself as they are not part of the Discover process established for cube views within Guided Reporting.



Set Report Options and Filters

1. On the Home page, in Report Groups, select a report group.
2. In Reports, click a report.

The report generates and populates the right side of the screen.

3. For reports specific to cube views, see ["Select Parameters" on the next page](#).

Select Parameters

When viewing Cube View reports, parameters display based on what is used for that report which may include multiple parameters for a single dimension.

A maximum of 15 parameters may be shown on the Home page. If more than 15 are used in a cube view, you have the option on the Selector List to choose how the parameter is used on the Home page. For example, *None* will not show that parameter.

1. In the example below, there is a global parameter defined and two Selector List view parameters in the Selector List bar that state *No Selection*. Click the **No Selection** text box at the top of the screen.

GUIDED REPORTING	
ANALYSIS	
Define Global Parameter	WorkflowEntityPrompt: Total GolfStream
Report Options	ParamScenario1: No Selection ParamScenario2: No Selection
Report Groups: FinRptg	
Reports: Income Statement Balance Sheet Controller Workspace Sales Details OpEx Details	

2. In the Item Selector dialog box, select a parameter and click **OK**.

The screenshot displays the 'GUIDED REPORTING' application window, specifically the 'ANALYSIS' tab. The interface is divided into several sections:

- Define Global Parameter:** A text box labeled 'WorkflowEntityPrompt:' contains the value 'Total GolfStream'.
- Report Options:** Two text boxes labeled 'ParamScenario1:' and 'ParamScenario2:' both contain the value 'No Selection'.
- Report Groups:** A dropdown menu shows 'FinRptg' selected.
- Reports:** A list of report types is shown, with 'Income Statement' highlighted. Other reports include 'Balance Sheet', 'Controller Workspace', 'Sales Details', and 'OpEx Details'.

An 'Item Selector' dialog box is open in the foreground, overlapping the 'Report Options' section. It features a search bar and a list of items:

- Actual
- ActualLegal
- BudgetV2
- ActualBud - Actual at Budget Rates
- Flash
- BudgetWorking
- Target (highlighted)

At the bottom of the 'Item Selector' dialog, there are 'OK' and 'Close' buttons.

The report populates with your parameter selections.

GUIDED REPORTING

ANALYSIS

Define Global Parameter

Report Options

Report Groups:
FinRptg

Reports:
Income Statement
Balance Sheet
Controller Workspace
Sales Details
OpEx Details

WorkflowEntityPrompt:
Total GolfStream

ParamScenario1:
Target

ParamScenario2:
BudgetV2

ParamPeriod1POV:
2022

Members_UD2s_AllDims_Base:
Subassemblies

Income Statement

	2022 Target	2022 BudgetV2	2022 Variance
60000 - Operating Sales	1,212,138	1,186,804	25,334
60200 - Returns & Allowances	303,800	297,450	6,350
60999 - Net Sales	908,339	889,354	18,985
41000 - Operating Cost of Goods Sold	645,200	658,149	-12,949
42000 - IC Cost of Goods Sold	39,458	41,184	-1,726
43000 - Cost of Goods Sold	684,659	699,333	-14,675
61000 - Gross Margin	223,680	190,021	33,659
54400 - Total Operating Exp Before Allocation			
54350 - Total Allocations			
54500 - Total Operating Expenses			
62000 - Total Operating Income	223,680	190,021	33,659
62999 - Total Other Income (Expense)			
63000 - Earnings Before Interest and Taxes	223,680	190,021	33,659
64000 - Earnings Before Taxes	223,680	190,021	33,659
56999 - Total Income Taxes			
69000 - Net Income	223,680	190,021	33,659

Change Parameter Selections

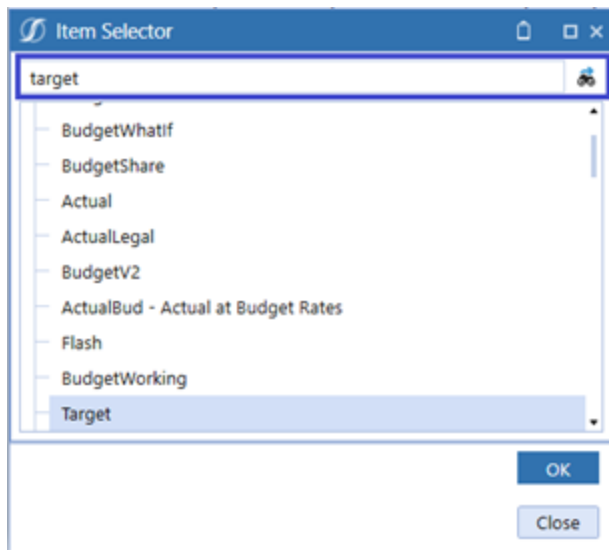
When viewing a Cube View report for the first time, parameters that have a default value will populate the filter. If a default value is not assigned to the parameter, No Selection will display. Once the parameter filter is selected, it will remain for future sessions where that parameter is used. You may choose to update a parameter at any time. For more information on rendering reports based on auto update features, see ["User Preferences" on page 8](#).

1. Click a parameter at the top of the screen.
2. In Item Selector, select a parameter and then click **OK**.

The parameter and report update to the selection you made.

Home Page

If the parameter provides a large list of values to choose from, type the value you want in the Search bar and click the icon to the right. Using the search bar will take you directly to the value you are looking for.



User Interface for Shared Parameters Sets

On the Home page, when you select a report that has shared column or row sets, you will see a drop-down list for each column and row set below the report listing.

NOTE: There is a maximum of two column set and two row set lists.

These fields are dynamic based on the number of column sets or row sets being used in your main cube view. If shared column or row sets are not being used for that Cube View report, you will not see anything below the reports section on the Home page.

Home Page

1. In Report Groups, select a report group.
2. In Reports, select a Cube View report that uses one or more shared parameter sets.
3. In the image below, there is a Cube View report that is using one column set parameter. Select a column set cube view for your data to render to. In this example, select Same Period Last Year which rendered Feb 2022 and Feb 2021 results.

The screenshot displays the 'GUIDED REPORTING ANALYSIS' interface. On the left, the 'Report Groups' dropdown is set to 'FinRptg', and the 'Reports' list includes 'Income Statement', 'Balance Sheet', 'Controller Workspace', 'Sales Details', and 'OpEx Details'. The 'Column Set 1:' dropdown is set to 'Same Period Last Year'. The main area shows the 'Income Statement' report with parameters: 'WorkflowEntityPrompt: Total GolfStream' and 'ParamTime: 2022M2'. The 'Members_UD2s_AllDims_Base' dropdown is set to 'Subassemblies'. The report table displays data for Feb 2022 and Feb 2021.

	Feb 2022	Feb 2021
60000 - Operating Sales	229,704	222,047
60200 - Returns & Allowances	57,571	55,652
60999 - Net Sales	172,133	166,395
41000 - Operating Cost of Goods Sold	133,281	128,838
42000 - IC Cost of Goods Sold	28,080	0
43000 - Cost of Goods Sold	161,361	128,838
61000 - Gross Margin	10,772	37,557
54400 - Total Operating Exp Before Allocation		
54350 - Total Allocations		
54500 - Total Operating Expenses		
62000 - Total Operating Income	10,772	37,557
62999 - Total Other Income (Expense)		
63000 - Earnings Before Interest and Taxes	10,772	37,557
64000 - Earnings Before Taxes	10,772	37,557
56999 - Total Income Taxes		
69000 - Net Income	10,772	37,557

4. Continue to make your selections based on the number of column sets and row sets the main Cube View report is using.

The report populates with the parameters you selected.

Use Reports with Parameters from Cube View Templates

If the main cube view uses a parameter for column or row sharing, the Discover process for the main cube view scans the member filter sections of the template cube views and includes those additional parameters to select from on the Home page. These parameters display when the template cube view that it resides in is selected from the column or row set drop-down list.

They are dynamic in that parameters for each Cube View report (main or shared) only show the parameters assigned to it.

If the template parameter is the same as a parameter used in the main cube view, it updates using the single parameter shown.

If the template parameter for a single dimension is different from the main cube, the template parameter renders in the main Cube View report.

1. In Report Groups, select a report group.
2. In Reports, select the main Cube View report.
3. In Column Set or Row Set, select a Cube View report with a template where an additional parameter is used within it.

This template parameter dynamically appears in the Global view or the Selector List view.

Help and Miscellaneous Information

 This page contains solution documentation.

Display Settings

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

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any Custom Scaling options.

Package Contents and 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: GDR_PV6.0.0_SV100_PackageContents.zip

Identifier	Description
GDR	Solution ID
PV6.0.0	Minimum Platform version required to run solution

Identifier	Description
SV100	Solution version
PackageContents	File name

Solution Database Migration Advice

A development OneStream application is the safest method for building out a solution with custom tables such as this one. The relationship between OneStream objects such as workflow profiles and custom solution tables is that they point to the underlying identifier numbers and not the object names as seen in the user interface. Prior to the solution configuration and to ensure the identifiers match within the development and production applications, the development application should be a recent copy of the production application. Once the development application is created, install the solution and begin design. The following process below will help migrate the solution tables properly.

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

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.

Appendix: Additional Parameter Details

Parameter Types Available from the Discover Process

Member List	Selector List or Global View	Flat List of Members to Choose
Member Dialog	Both	Similar to Member Dialog but with search capabilities
Literal	None	Value is hard-coded and cannot be used on the Home page.
Input	Both	Value can be updated on the Home page.
Delimited List	Both	Valid values to choose from are populated in the parameter type.
Bound	Both Shown in the Reports section of the Home page	Members available to choose from are in the Command type.

Discover Process for Cube View Templates Using Additional Parameters

When you add a Cube View report to the report group that is using a shared parameter for the column or row set, and then click **Discover**, the process also scans all of the template parameters within the shared parameter for any dimension to see if any template parameters exist and are included in the Selector List table. Like any other parameter in the Selector List table, they default to the sort order of 10 and are designated to the proper Home page interface (the Selector List view, Global view, or None).