



Support Resources Guide

7.3.0 Release

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Introduction

The purpose of the Support Reference Guide is to provide a central location for information related to OneStream support, such as the support portal, the Marketplace, and Cloud Monitor. We have developed these tools to add to your success and we want to empower you to use them to the fullest.

Support Portal Administrators

At the beginning of your OneStream journey, you designated several users as your OneStream administrators. To add or remove an administrator, have an existing administrator e-mail support@onestreamsoftware.com with the request.

This guide will be most useful to you if you are one of those administrators.

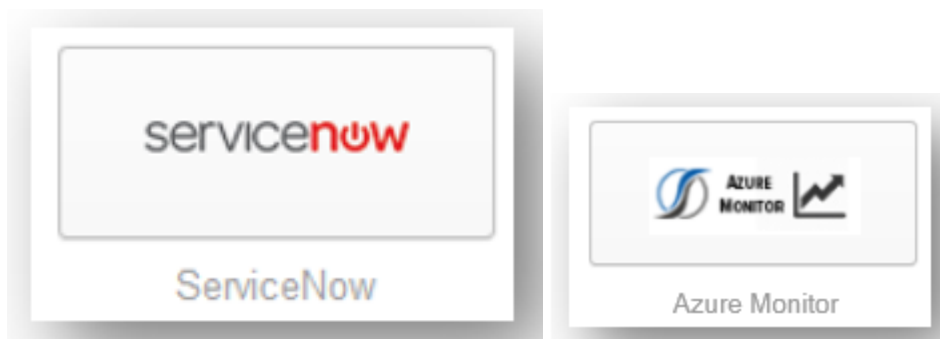
One Stream Okta Portal

This is your gateway to all things OneStream.

Administrators can access the OneStream Okta portal by visiting <https://onestream.okta.com>

You will see the OneStream applications you have access to, such as:

- Service Now for the support portal and knowledge base articles.
- Cloud Monitor for analyzing your Cloud environment resource usage.



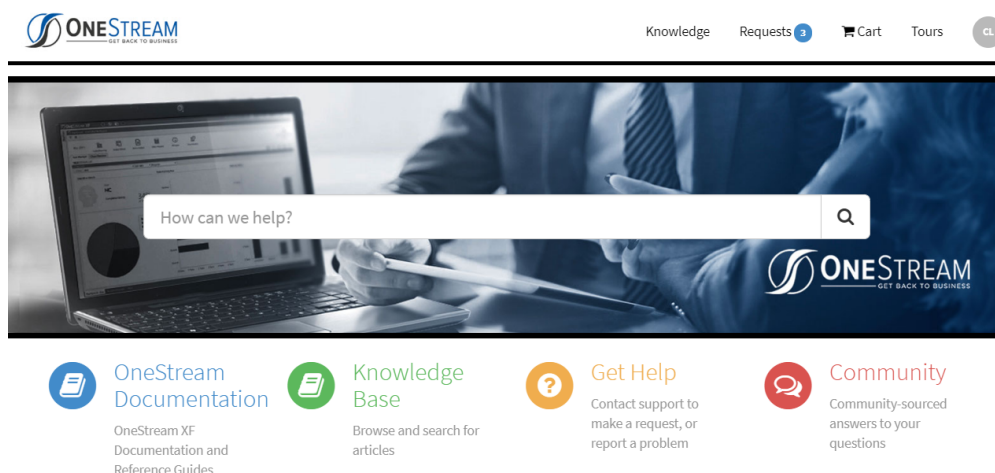
Support Portal

The support portal is full of resources to help you succeed, including documentation and Knowledge Base articles searchable by keyword, so you can easily find what you are looking for.

Access

There are many ways for administrators to access the support portal:

- The Service Now chicklet at <https://onestream.okta.com>
- Directly at <https://support.onestreamsoftware.com>
- Alternatively, you can create a ticket by e-mailing support@onestreamsoftware.com



Navigation

The following section details how to navigate the Support Portal.

How can we help?

Typing a subject in the How can we help? bar shown above will browse our Knowledge Base articles. For example, if you type “Excel Add-In,” you will find a list of instructional guides that reference the Excel Add-In.

Documentation, Knowledge Base, Get Help, Community

Each of these selections will take you to a different section of the Support portal. We will explore each of these in detail below.

Documentation

To access Documentation, navigate to <https://support.onestreamsoftware.com> and click OneStream Documentation.

Here you will find key OneStream reference documentation in one place, including the Design and Reference Guide, API Overview Guide, and Installation and Configuration Guide, among others.

Knowledge Base

To access the OneStream Knowledge Base, navigate to <https://support.onestreamsoftware.com> and click Knowledge Base.

The Knowledge Base is a fantastic resource with a wide variety of articles on all things OneStream. We add to these articles regularly.

Simply type the subject you are interested in the search bar and the related articles will come up.

The screenshot shows the OneStream Knowledge Base search interface. At the top, there is a search bar with the text "cloud monitor" and a magnifying glass icon. Below the search bar, the page is divided into two main sections. On the left, there is a navigation menu with the following items: "All", "Knowledge Bases" (which is highlighted in blue), "Questions and Answers", and "Catalogs". On the right, the search results are displayed under the heading "Search results for 'cloud monitor'". There are two search results listed. The first result is titled "How to Use the OneStream Cloud Monitor Portal?" and includes a brief introduction: "The following article contains information about the OneStream CloudMonitor portal provided as part of the OneStream managed service. The OneStream Cloud Monitor is a webportal Instruction". Below the introduction, it shows the article ID "Article: KB0010395" and the publication date "Published: 3mo ago". The second result is titled "How to Schedule a Data Management Job on Azure" and includes the introduction: "OneStream Cloud Services to schedule the automation job, please follow the instructions below submitted, the assigned OneStream Cloud engineer will work with you to set up the Data Management the cred". Below the introduction, it shows the article ID "Article: KB0010636" and the publication date "Published: 10d ago".

Get Help – Make a Support Request

To create a request with OneStream Support, navigate to <https://support.onestreamsoftware.com> and click Get Help. Our team will direct your ticket to the department best suited to assist.



CC: Anyone you CC on the ticket will be added as a watcher to receive all ticket updates. They can contribute to the ticket via e-mail reply.

Enable Support Access: Clicking this box will allow Cloud Support to access your environment to troubleshoot or to enact a change, if needed. More on this below.


Severity Level: Select the severity level of your request. A severity level 1 will send an emergency page to Support, 24/7. Please note that only an inaccessible environment qualifies as a severity level 1.



Home > OneStream Software_Customer Service Catalog > How Can We Help? > Create Incident Search

Create Incident

Create an Incident record to report and request assistance with an issue you are having

Request assistance with an issue you are having. An incident record will be created and managed through to successful resolution. You will also be notified of progress via email.


CC 


Please separate multiple emails by a comma (,) (i.e. test@example.com, test2@example.com)  


Enable support access to cloud environment for this incident?

* Subject

* Description

* Severity Level?
 

Type
 

 Add attachments


Enable Support Access

The Enable Support button is a security feature that gives you better control over when Support can access your environment. An administrator will need to check this box before Support is able to access.




You can enable this access upon ticket creation by checking the Enable support access to cloud environment for this incident box, as shown above.


If you did not check the box originally but want to enable support access, navigate to <https://support.onestreamsoftware.com>, select the ticket you need to enable access on, and click the red Enable Support Access button, as shown below.


Support Portal

Example Ticket 

Type your message here... Send

 Just now • Public Reply
Example

 Just now
INC0049927 Created

Environment Access for this Incident

Enable Support Access

Actions

Escalate

Your request has been submitted

Number	State
INC0049927	New
Priority	Created
3 - Moderate	just now
Enable Support Access?	false

Cloud Monitor

Cloud Monitor is a set of dashboards Cloud customers can use to manage the health and usage of their environment resources.

Accessing Cloud Monitor

To access Cloud Monitor, follow the steps below.

1. Navigate to the OneStream Okta portal at <https://onestream.okta.com> and click the Azure Monitor chicklet.



2. Ensure that you see OneStream Cloud CSC in the top right-hand corner. If you see something else, you may need to submit a ticket to Support to troubleshoot this issue.

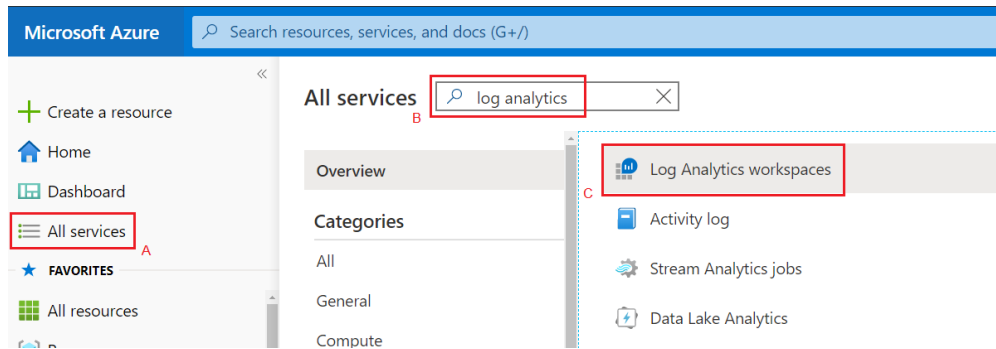


3. Once you see OneStream Cloud CSC in the top right, navigate to Log Analytics as shown below.

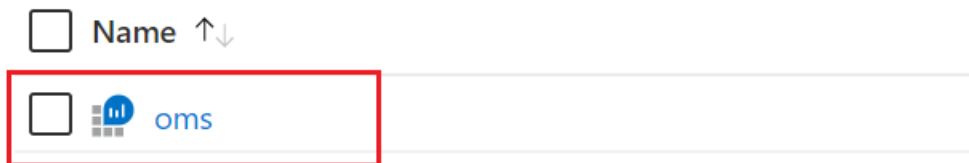
- a. Click All Services.
- b. Search for Log Analytics.
- c. Select Log Analytics Workspace.

TIP: If you hover over Log Analytics Workspaces and select the star, it will be added to the menu on the left as a shortcut.

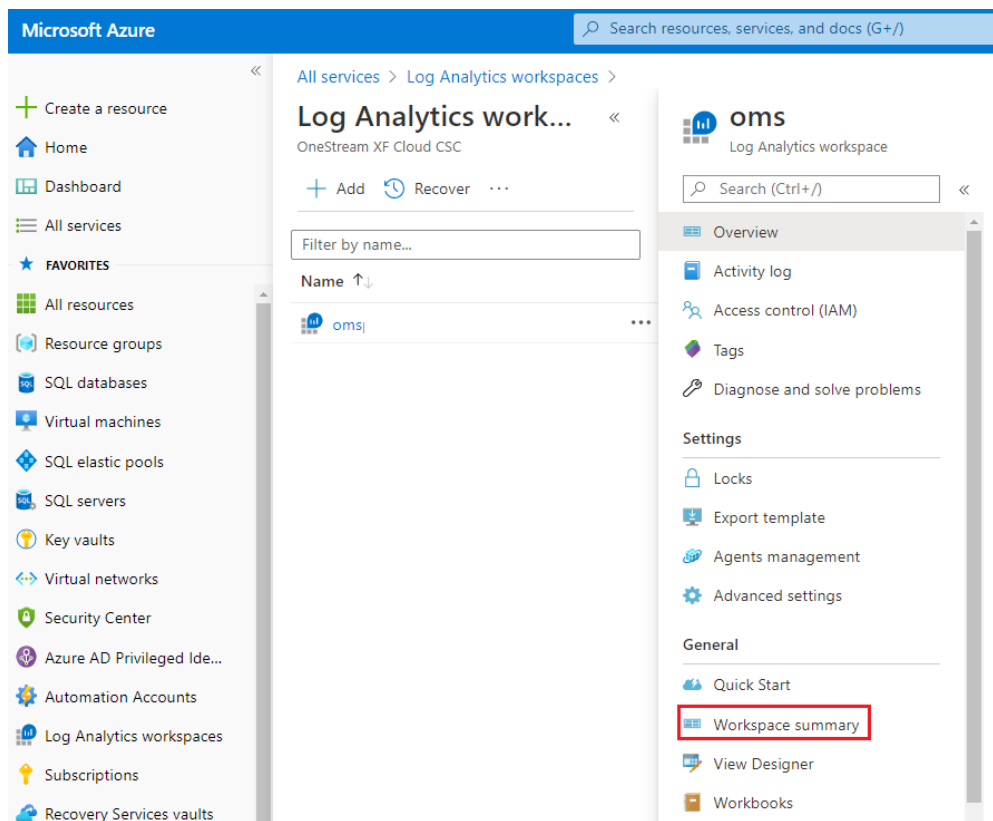
Cloud Monitor



4. In Log Analytics Workspaces, select the only available workspace, omsYourCompanyName.



5. On the next page, select Workspace Summary.



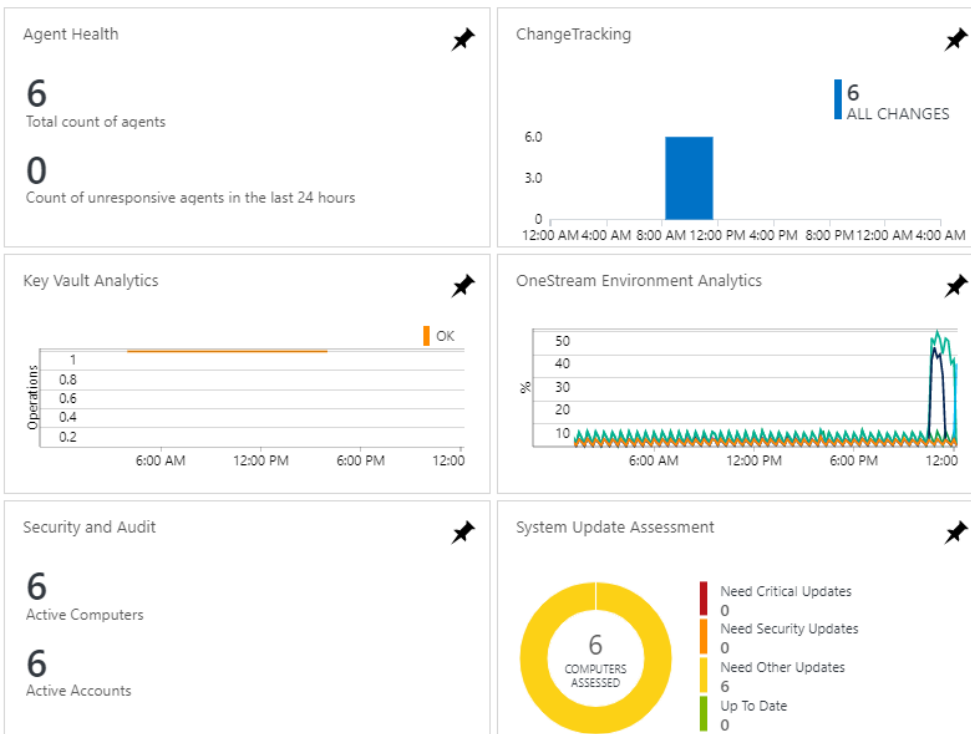
Using Cloud Monitor

In this section you will learn how to use Cloud Monitor.

Overview

The OneStream Cloud Monitor consists of several dashboards showing near real-time views as Alerts, Environment Health, Activity Logs, Performance Statistics, and an array of other information.

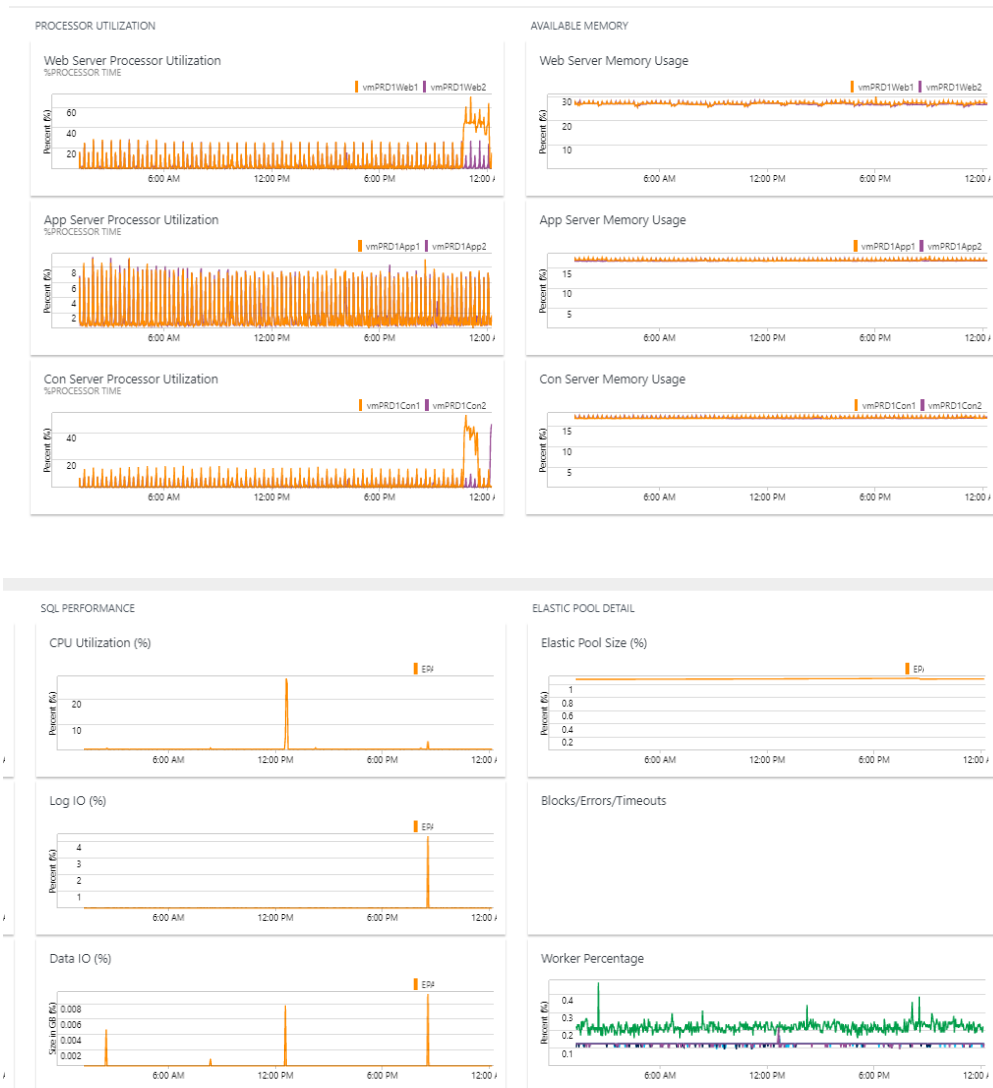
Cloud Monitor



OneStream Environment Analytics

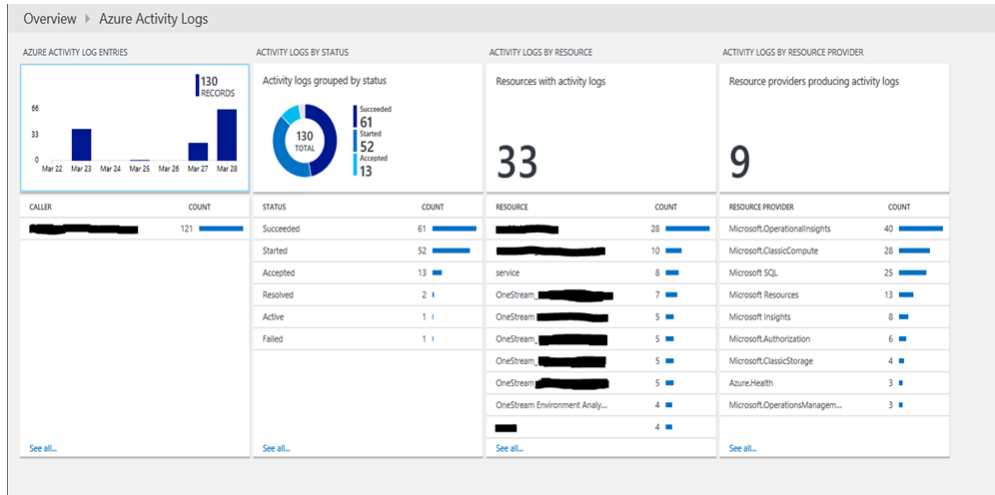
This is the heart of Cloud Monitor; a detailed overview of the performance of your servers running in Azure. Displayed is the current status of system resources, resource utilization, and any SQL errors. These performance statistics are updated in 1 to 2.5 minute intervals.

You can use Environment Analytics as part of your testing to understand which resources are being utilized during which tasks. OneStream Support can flexibly accommodate your OneStream design by assigning certain tasks to specific servers, to maximize and streamline your resource usage. Environment Analytics can give you valuable insight to optimize those choices.



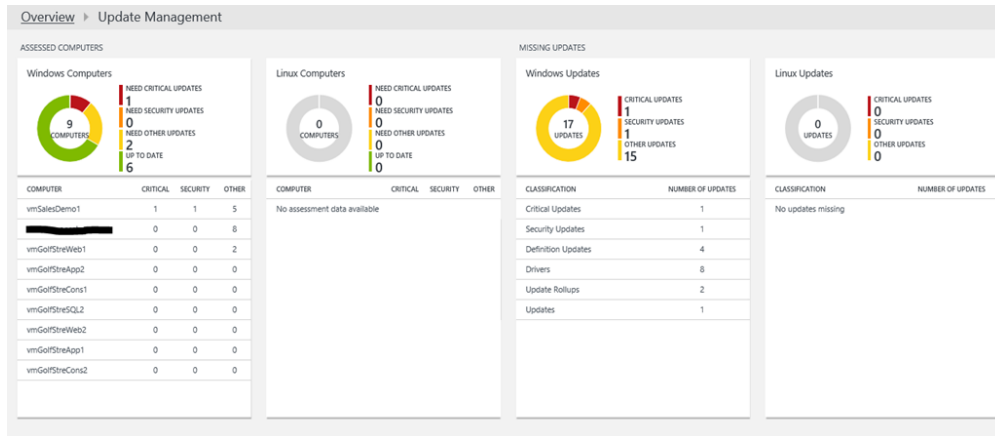
Azure Activity Logs

Azure Activity Logs gives insight into what actions and processes are being performed in Azure and what user and service is performing those actions. This includes servers being turned on or off, success or failure of database and Virtual Machine backups, status of automation jobs, as well as impacts of Microsoft outages on your environment. In a single view, see aggregated statistics of all activities and then drill-down for more details.



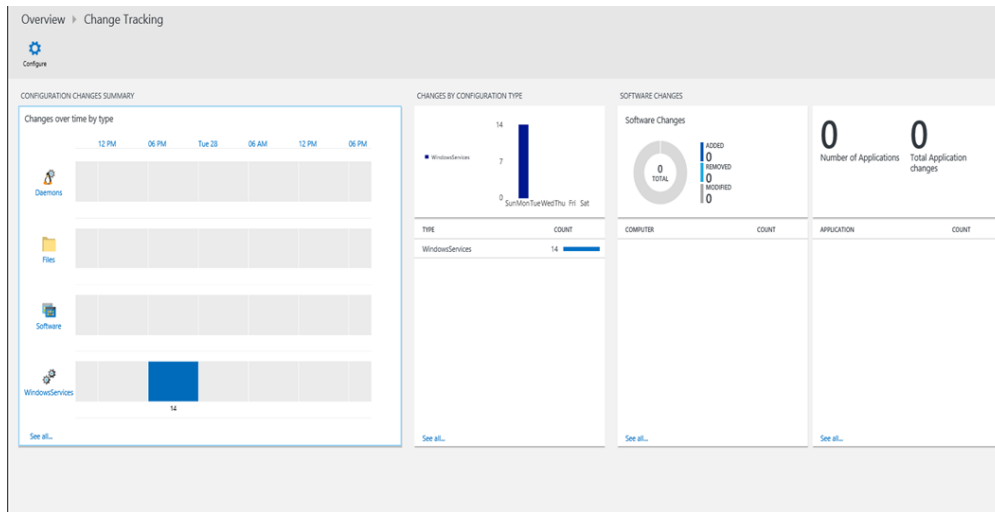
System Update Assessment

This view gives insight into the current operating system patch status.



Change Tracking

This view tracks changes to installed and uninstalled applications, identified services being stopped or started, identified service startup type being changed, and changes to identified files on virtual machines.



FAQ

How do I access Marketplace?

Marketplace is accessible at <https://xfmarketplace.com/onestreamweb/onestreamxf.aspx>, in an Internet Explorer browser.

If you are not able to access this link, submit a ticket to the support portal requesting Marketplace access and our support team will assign you the necessary permissions.

How do I access the Academy?

Submit a ticket to the support portal with the request. Once you have been approved for Academy access, the chicklet for Academy will appear in your OneStream Okta portal at <https://onestream.okta.com>

Why don't I have access to a resource referenced in this guide?

Only the designated support portal administrators can access these resources.

How can I add or remove a support portal administrator?

To change an administrator, have an administrator submit a ticket to the support portal requesting the change, including the full names and e-mail addresses of the users to be changed.

Where can I find the Excel Add-In?

This is available in the Marketplace -> Marketplace. You can search for Excel in the search box.

How do I upgrade to the new version of OneStream?

Have a support portal administrator submit a ticket requesting the change. Cloud Services will take the ticket and provide a link for you to schedule two hours of downtime for your upgrade.

Where can I find SOC reports?

These are available by navigating to Marketplace -> Marketplace -> Help (bottom toolbar) -> SOC.

Where can I find documentation for OneStream?

Many technical documents and reference materials are available at Marketplace -> Platform. If you are looking for information on a specific topic, you can also browse the Knowledge Base at support.onestreamsoftware.com -> Knowledge Base.