



Application Control Manager Guide

PV710 SV101

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Solution Overview

OneStream Application Control Manager is a MarketPlace solution designed to support and manage change requests and ensure the right level of control and governance over application changes.

With Application Control Manager, you can:

- Import metadata from ERP, data warehouses, or MDM tools and synchronize changes to OneStream.
- Provide an easy way for users to request changes to OneStream applications. For example, new or updated accounts, cost centers, other dimensions and user privileges.
- Allow governance of user security creation and maintenance.
- Utilize multi-level approval workflow for change requests.
- Create audit reports on application change requests.
- Manage metadata changes across environments (Dev-Test-Prod).

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 7.1.0 or later	Minimum OneStream Platform version required to install this version of Application Control Manager.
Microsoft SQL Server 2016 Standard SP1 or later	Application Control Manager requires an instance of Microsoft SQL Server 2016 Standard SP1 or later.

Select the Application Control Manager Development Location

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

Production OneStream Application: The primary advantage of building the solution 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 the solution in the Development environment with a fresh copy of the Production application before starting work.

Development OneStream Application: As a best practice, use the Development OneStream application to build the solution.

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to Application Control Manager, such as **Workflow Profiles** and **Entities**, are in the Production application.
2. Create a backup copy of your Production database or copy your Production OneStream application to your Development environment and rename it. This Development version will be used for your Application Control Manager project.
3. It is suggested to temporarily increase the Database Command Timeout settings for the installation. This can be done in the OneStream Application Server Configuration Tool. In Database Connections under the Connection Strings section, set the Command Timeout and Command Timeout Large settings to 3600. These values can be reverted after the installation is complete.

Install Application Control Manager

1. On the OneStream Solution Exchange website , go to **MarketPlace > Application Control Manager**.
2. On the Application Control Manager Solution page, select the 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** icon and click **Open**.
7. When the solution file name displays, click **Load**.
8. Click **Close** to complete the installation.
9. Click **Application Control Manager Installer** and expand the Application Control Manager Installer.

10. Click **Step 1: Install**.
11. Click **Proceed** on the Installation Process Warning message.
12. Close the dialog box when the installation process is complete.
13. Refresh the application and navigate to **OnePlace > Dashboards > Application Control Manager**. You will see the solution.

NOTE: If you are upgrading from a previous version, you must close any existing and open requests from the previous version to complete the new installation. If an open request is detected, the installation process will stop and a log message will display in the Task Activity Log.

Set Up Application Control Manager

The first time you run Application Control Manager, tables are set up from the installer.

Package Contents

The Application Control Manager is the user interface for settings and application governance. The following Business Rules are included:

- ACM_MetadataSource
- ACM_DataSet
- ACM_Reports
- ACM_Config
- ACM_Engine
- ACM_FlowHelpers
- ACM_Globals
- ACM_Helpers
- ACM_ItemHelper
- ACM_Logging

Setup and Installation

- ACM_Objects
- ACM_RequestHelper
- ACM_SolutionHelper
- ACM_SQLHelpers
- ACM_Validations
- ACM_Param
- ACM_CreateFlowViews
- ACM_CreateRequest
- ACM_MetadataCommit
- ACM_PrepareMetadata

The following items are included with the installation to import metadata from source.

- Dimensions:
 - Entity dimension: ACM_MetadataImportMember
 - Scenario dimension: ACM_MetadataImportScenario
 - Account dimension: ACM_MetadataImportParent
- Cubes
 - ACM_MetadataImport
- Workflow Profiles
 - ACM_MetadataImport
- Data Management Group
 - ACM_MetadataImport
- Parser

Setup and Installation

- ACM_ImportMetadata
- Connector Business Rules:
 - ACM_AccountSource Business Rule
 - ACM_EntitySource Business Rule
 - ACM_UD1-8Source Business Rule
- Transformation Rules:
 - ACM_ImportMetadata_View
 - ACM_ImportMetadata_Account
 - ACM_ImportMetadata_Entity
- Transformation Rule Profile:
 - ACM_ImportMetadata
- Standard default Metadata, Views, Properties, Validations, and Flows

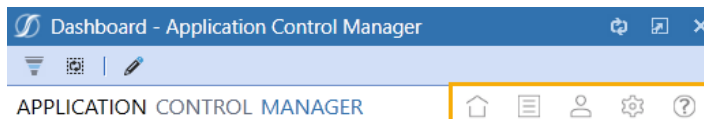
Data Management Sequences and Steps are created for use with their related Business Rules. The benefit of running these processes through a Data Management Sequence is that they can run in the background while the user continues their work.

NOTE: It is not recommended to modify any standard default Dimensions, Flows, Views, or Properties provided with installation as they may get over-written during the upgrade. Make a copy of them with a different name instead.

Application Control Manager Dashboard

Navigation Toolbar

In the Application Control Manager dashboard, use the toolbar icons to navigate to different pages.



- **Home:** Manage requests: Create, edit, manage, view, claim, unclaim, pushback, reject, and commit.
- **Reports:** Run reports on requests.
- **Administration** (Administrator Only): Define and create request views, flows, dimensions, properties, and validations.
- **Settings** (Administrator Only): Global settings for the solution. Most settings are configured once during the initial installation and do not need to be updated on an ongoing basis.
- **Help:** View the Application Control Manager user guide.

Home

APPLICATION CONTROL MANAGER

HOME TESTING MODE (Turn Off in Production)

Create Edit Manage View Claim Unclaim Pushback Reject Commit

Filter: All Recent

Master Request

ID	Request Type	Status	Step Label	Created By	Claimed By	LastModified
R00001120	Account	Completed	Commit	Admin		5/4/2023 12:43:47 PM
R00001119	Account	Closed	Initiate	Admin		5/4/2023 12:38:48 PM
R00001118	Account	Completed	Commit	Admin		5/4/2023 12:34:08 PM

76 Rows Page 1 of 2

REQUEST DETAIL R00001118

Items Documents

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

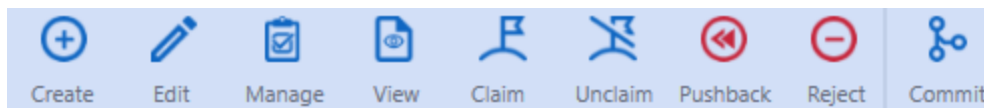
Action	Dimension	Parent Name	Member Name	Notes
UPDATE	SortAccount	A_PlugAccount	A_20300	

Request Activity Add Comment

Activity Log

Username	Timestamp	ActivitySummary
Admin	5/4/2023 12:34:08 PM	Commit Successful : Commit
Admin	5/4/2023 12:34:08 PM	Commit Item Success : Action: UPDATE Dimension: SortAccount Name: A_20300 Parent: A_PlugAcco

Home Toolbar

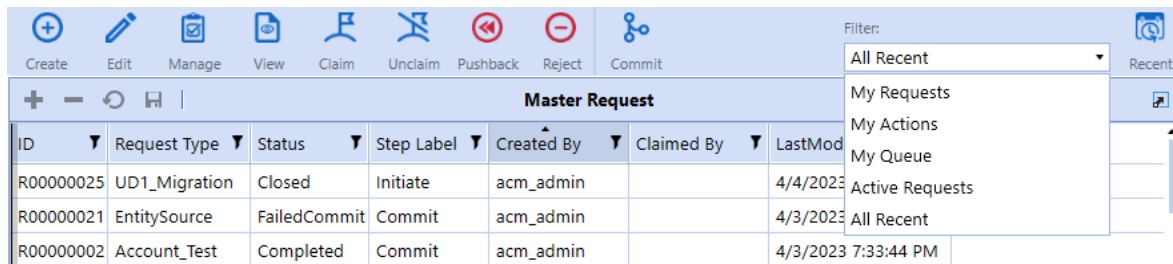


- **Create:** Create a new request.
- **Edit:** Update an existing request.
- **Manage:** Redirects to the Manage Request page to add and update items.

Application Control Manager Dashboard

- **View:** View an existing request in read-only mode. Request Workflow and Save icons are not displayed, so the request cannot be edited.
- **Claim:** Claims the request so the current user can work on it. Removes this request from the queue of other users.
- **Unclaim:** Puts the request back into the queue as Unclaimed for other users to claim.
- **Pushback :** Pushes the request back to a prior step.
- **Reject:** Rejects and closes the request.
- **Commit:** Manually launches the Commit Data Management sequence to commit all requests currently at the Commit step with a status of Waiting.


Request Filter Bar

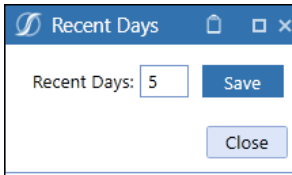


ID	Request Type	Status	Step Label	Created By	Claimed By	LastMod
R00000025	UD1_Migration	Closed	Initiate	acm_admin		4/4/2023
R00000021	EntitySource	FailedCommit	Commit	acm_admin		4/3/2023
R00000002	Account_Test	Completed	Commit	acm_admin		4/3/2023 7:33:44 PM

- **My Requests:** Shows requests the current user has created.
- **My Actions:** Shows requests with pending actions for the current user.
- **My Queue:** Shows requests for the current user when their group has the next pending action (for example, Enrich group).
- **Active Requests:** Shows requests that are currently active (not in a closed, completed, or committed status).
- **All Recent:** Shows all requests in any state from recent days as configured in the next option.

Application Control Manager Dashboard

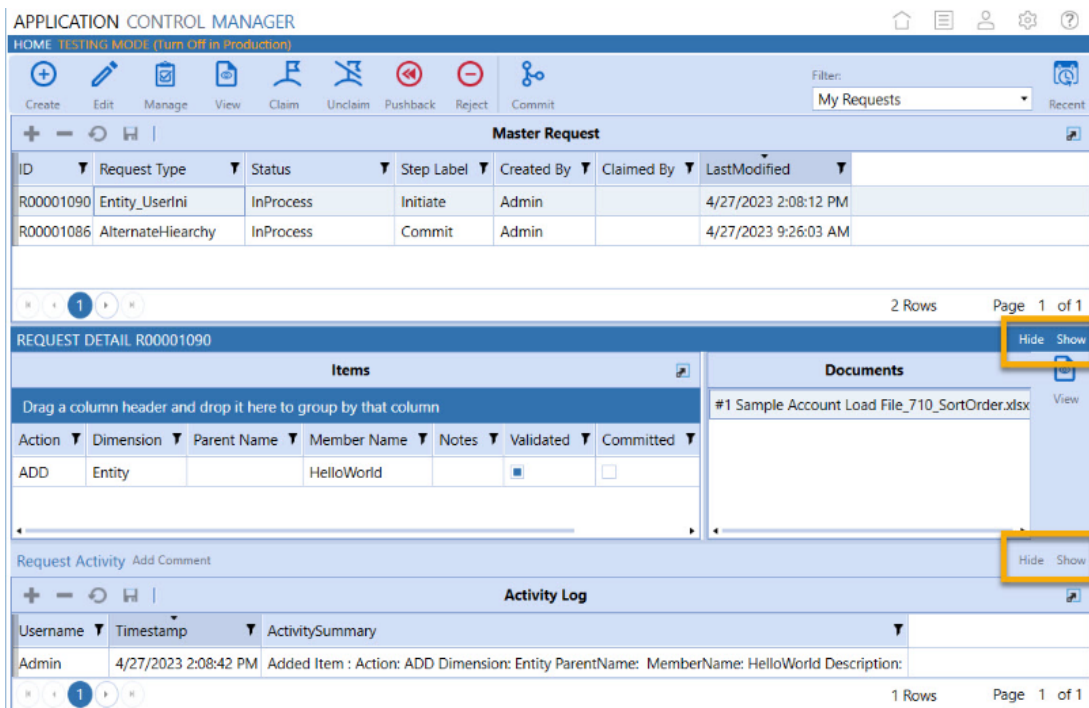
-  **Recent** : Configures how many days to view in the All Recent filter.



A dialog box titled "Recent Days" with a close button in the top right. It contains a text input field labeled "Recent Days:" with the value "5" and a "Save" button to its right. Below the input field is a "Close" button.

Request Detail

On the Home page, you can view a request's line item details, document attachments, and activity log by clicking Show on the right side of the page. You can also hide the panel windows, or resize them to get more viewable space.



The screenshot shows the "Request Detail" page for request ID R00001090. The page is divided into several sections:

- Master Request Table:** A table with columns: ID, Request Type, Status, Step Label, Created By, Claimed By, LastModified. It contains two rows of data.
- Items Table:** A table with columns: Action, Dimension, Parent Name, Member Name, Notes, Validated, Committed. It contains one row with "ADD" action, "Entity" dimension, and "HelloWorld" member name.
- Documents:** A section showing a document titled "#1 Sample Account Load File_710_SortOrder.xlsx" with a "View" button.
- Request Activity:** A section with an "Add Comment" button and a "Request Activity" header.
- Activity Log Table:** A table with columns: Username, Timestamp, ActivitySummary. It contains one row showing an "ADD" action by "Admin" at "4/27/2023 2:08:42 PM".

Navigation and control elements include a top toolbar with icons for Create, Edit, Manage, View, Claim, Unclaim, Pushback, Reject, and Commit. A filter dropdown is set to "My Requests". On the right side of the "Items" and "Documents" sections, there are "Hide" and "Show" buttons, which are highlighted with orange boxes in the image.

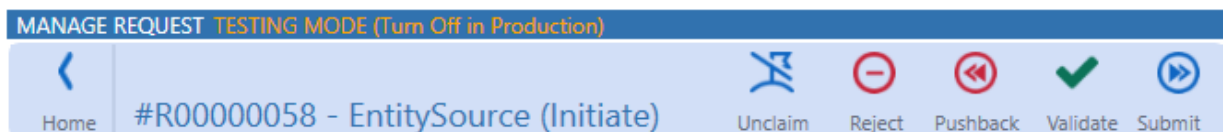
- **Items Table:** Shows summary information of the items created on the selected request.
- **Documents:** View documents attached to the selected request.
- **Request Activity:** View the activity log for the selected request and add comments to it.

Manage Request

On the Manage Request page, you can:

- Move a request forward or backward in the request flow.
- Reject a request.
- Validate items in a request.
- Create or delete request items.
- Attach, delete, and download documents.

Request Summary and Workflow Buttons



- Home: Redirects to the Application Control Manager Home page.
- Request Summary
 - Request ID, Flow Name, Current Step
- Request Workflow Buttons
 - **Unclaim**: Puts the request back into the queue as Unclaimed for other approved users to claim and redirects back to the Application Control Manager Home page.
 - **Reject** : Rejects and closes the current request. You can no longer edit the request after this action.
 - **Pushback**: Pushes the request back to the previous step in the request flow.
 - **Validate Request**: Checks the validation status of all items in the current request.
 - **Submit**: Moves the request to the next step in the request flow.

Request and Document Buttons



- **Add:** Opens a dialog box to create a new item.
- **Remove:** Deletes the selected item.
- **Attach:** Opens file explorer to attach a supporting document.
- **Delete:** Deletes the selected document.
- **View:** Downloads the selected document.

Item Table

The item table shows individual line items or changes that are associated with the request. A single request can contain multiple line items. The Items grid can display unlimited rows and also allows you to export the data by right-clicking within the grid.






Items								Documents
Drag a column header and drop it here to group by that column								
Action	Dimension	Parent Name	Member Name	Description	Notes	Validated	Committed	ParentInRequest
ADD	HoustonEntities	Houston	West Houston			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADD	HoustonEntities	West Houston	Katy			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- **Item Group** (not shown): For Grouped Request Types (such as Cost Center), shows the Item Name of the Group Parent Item.
- **SubItem** (not shown): True/False, indicates if the item is a sub item of a Grouped Item. Only valid on Grouped Request Types.
- **Action:** The metadata action to be performed at the Commit step.
- **Dimension:** OneStream dimension to be updated at the Commit step.
- **Parent Name:** OneStream parent member name.
- **Member Name:** OneStream member name.

- **Description:** OneStream description.
- **Notes:** An input text field that is specific to the particular item.
- **Validated:** True/False, indicates if all item properties are valid.
- **Committed:** True/False, indicates if an item has been successfully committed.
- **ParentInRequest:** True/False, indicates if the Parent is included in the request.

Item Detail and Item Buttons

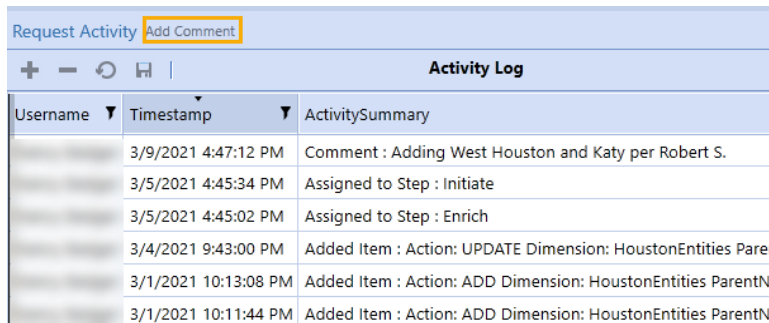
Enter or review properties for the item. Properties displayed here are set on the associated view.

ITEM DETAIL						
		Approvers	Note	Recalculate	Validate	Save
Item Details	Value					
* Name	<input type="text" value="Katy"/>					
* Parent Member Selector	Is the Parent included in the current request? <input checked="" type="checkbox"/> <input type="text"/>					
Is Consolidated	<input type="text"/>					
UD2Constraint	<input type="text"/>					<input type="button" value="..."/>
Workflow Channel	<input type="text"/>					<input type="button" value="..."/>
In Use	<input type="text"/>					<input type="button" value="..."/>

- **Approvers:** Add approvers to the current item.
- **Note:** Enter a note for the current item.
- **Recalculate:** Recalculates or refreshes the values for any calculated properties assigned to the view.
- **Validate:** Runs validations assigned to the current item.
- **Save:** Saves the current item properties.

Request Activity

View a running log of the current request activity. Click **Add Comment** to include additional commentary for the request.

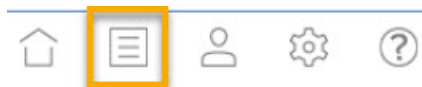


The screenshot shows a user interface for 'Request Activity'. At the top, there is a header bar with 'Request Activity' and a button labeled 'Add Comment'. Below this is a toolbar with icons for expand, collapse, refresh, and search. The main content is an 'Activity Log' table with the following data:

Username	Timestamp	ActivitySummary
	3/9/2021 4:47:12 PM	Comment : Adding West Houston and Katy per Robert S.
	3/5/2021 4:45:34 PM	Assigned to Step : Initiate
	3/5/2021 4:45:02 PM	Assigned to Step : Enrich
	3/4/2021 9:43:00 PM	Added Item : Action: UPDATE Dimension: HoustonEntities ParentN
	3/1/2021 10:13:08 PM	Added Item : Action: ADD Dimension: HoustonEntities ParentN
	3/1/2021 10:11:44 PM	Added Item : Action: ADD Dimension: HoustonEntities ParentN

Reports

The Reports Page icon allows user to run, view, and export reports. Reports are displayed in grid or PDF view.



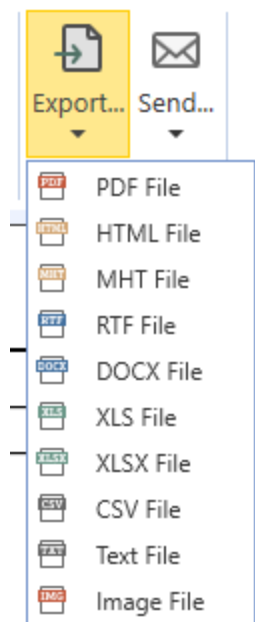
- **Metadata Bridge Report:** Displays the requester, all metadata changes made, action and status in Application Control Manager.
- **Request Audit:** Displays all requests made in a specified time (in days).
- **Request Audit by Request Type:** Displays the audit report specified by request type.
- **Request Audit by Status:** Displays the audit report by status.
- **Request Audit by Step Type:** Displays the audit report by step type.
- **Automated Request Audit with Item Detail:** Displays all requests that were automated from a source system into Application Control Manager.
- **Request Activity Audit:** Displays all activity that has happened in a specified audit time (in days).

Export Report Data

To export the data from the Grid View tab, right click anywhere on the table, select **Export** and then select the format for export:

- Excel XML
- CSV
- Text
- HTML

To export the data from the Report tab, click on the Export selector from the toolbar and then select the format for export:



Administration

On the Administration page you can define controlled governance in Application Control Manager:



- **Metadata:** Set up dimensions, actions, and source system imports.
- **Security:** Enable and disable allowed security actions.
- **Properties:** Works with OneStream defined properties and custom properties.
- **Validations:** Business rules can be set up to ensure user entry is appropriate.
- **Views:** Create and edit views. Assign properties and validations to views.
- **Flows:** Create the steps in the request approval process.
- **Reports:** Create custom report sets.
- **Exports:** Create and copy export groups and files.
- **Logs:** View log details.

Metadata

Provides options for the metadata governance set up of Application Control Manager. There are three tabs for metadata information:

- [Dimensions](#)
- [Actions](#)
- [Source System Import](#)

Dimensions Tab

Use this tab to define the dimensions that you want to be able to update in a request.

Application Control Manager Dashboard

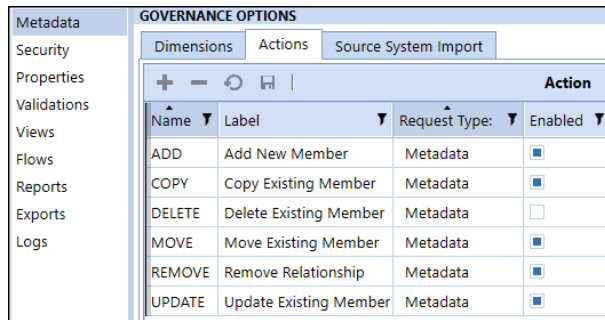
Metadata	GOVERNANCE OPTIONS				
	Dimensions	Actions	Source System Import		
Security	+ - ↻ H Dimension				
Properties	Label	Cube	Dimension	DimName	MemberFilter
Validations	Account	Houston	Account		A#Root.Tree
Views	CorpEntities	Houston	Entity	CorpEntities	E#Root.Tree
Flows	Entity	Houston	Entity		E#Root.Tree
Reports	HoustonEntities	Houston	Entity	HoustonEntities	E#Root.Tree
Exports	UD1	Houston	UD1		UD1#Root.Tree
Logs	UD2	Houston	UD2		UD2#Root.Tree
	UD3	Houston	UD3		UD3#Root.Tree
	UD4	Houston	UD4		UD4#Root.Tree
	UD5	Houston	UD5		UD5#Root.Tree
	UD6	Houston	UD6		UD6#Root.Tree
	UD7	Houston	UD7		UD7#Root.Tree
	UD8	Houston	UD8		UD8#Root.Tree

- **Label:** Unique label for the dimension. Click **+** to add a new dimension.
- **Cube:** Cubes in the current OneStream application.
- **Dimension:** OneStream dimension types.
- **DimName:** OneStream dimension names.
- **MemberFilter:** Text input field to assign the default member filter associated with this dimension.
- **Grouped** (visible if enabled in Global Options): Default is False. Set to True to create a Grouped Dimension type. If enabled, when a new item is created, an item is created for each dimension defined in the GroupedDim property. The Grouped dimension is not a true OneStream dimension and is not committed to the Metadata Dimension Library.
- **GroupDim** (visible if enabled in Global Options): A comma-separated list of the dimension labels to group together.

Actions Tab

Use this tab to enable or disable actions.

Application Control Manager Dashboard

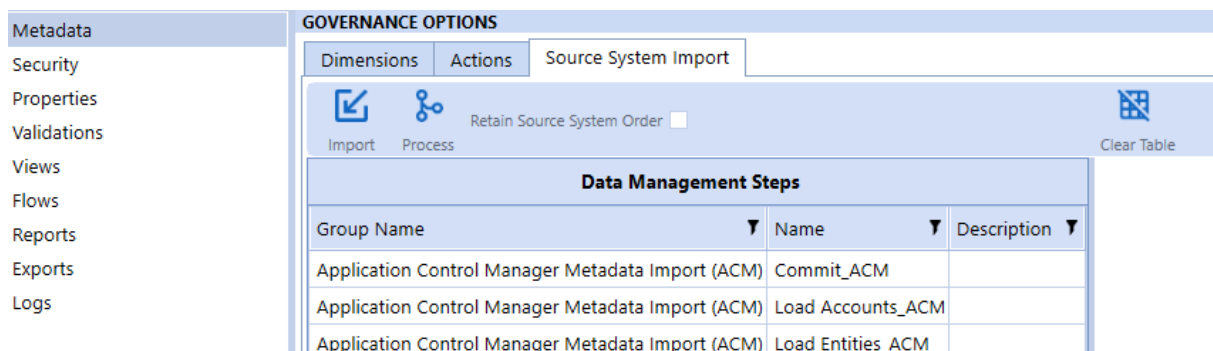


GOVERNANCE OPTIONS			
Actions			
Name	Label	Request Type	Enabled
ADD	Add New Member	Metadata	<input checked="" type="checkbox"/>
COPY	Copy Existing Member	Metadata	<input checked="" type="checkbox"/>
DELETE	Delete Existing Member	Metadata	<input type="checkbox"/>
MOVE	Move Existing Member	Metadata	<input checked="" type="checkbox"/>
REMOVE	Remove Relationship	Metadata	<input checked="" type="checkbox"/>
UPDATE	Update Existing Member	Metadata	<input checked="" type="checkbox"/>

- **Name:** Unique name for the action in Application Control Manager. These actions are not editable and do not allow additions.
- **Label:** Display name of the action in Application Control Manager.
- **Request Type:** The type of request that uses the action in Application Control Manager.
- **Enabled:** Enable or disable actions for your Application Control Manager design.

Source System Import Tab

Use this tab to manage source system import options of Application Control Manager.



Data Management Steps		
Group Name	Name	Description
Application Control Manager Metadata Import (ACM)	Commit_ACM	
Application Control Manager Metadata Import (ACM)	Load Accounts_ACM	
Application Control Manager Metadata Import (ACM)	Load Entities_ACM	

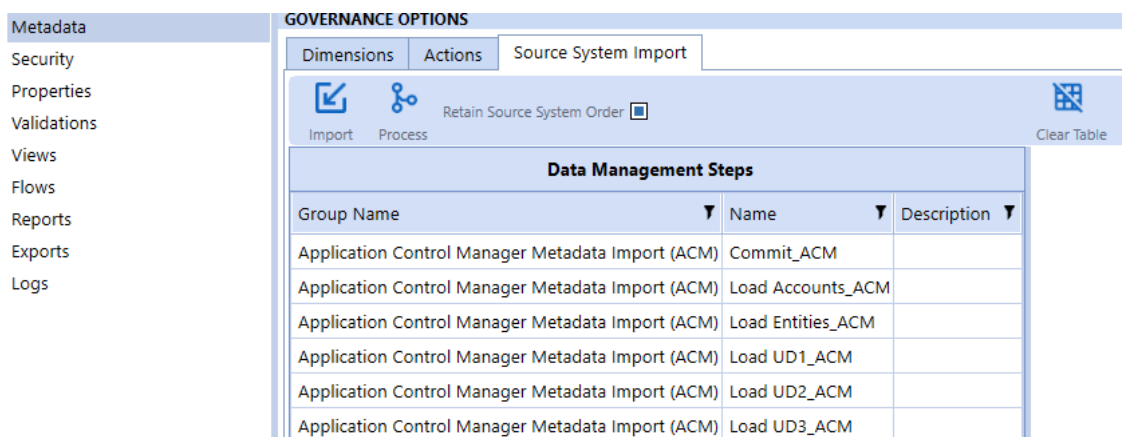
- **Import:** Import and upload an Excel template for Metadata.
- **Process:** Launches the data management step selected in the table.
- **Clear Table:** Erases the Metadata table for the selected data management step.

NOTE: If you are using an Excel template, ensure that you have consolidated the varying properties into the Member tab and that you have appended the varying property updates.

Retain Source System Order

The Source System Import sort order allows new members and existing members to import the custom order defined in the source system. Select Retain Source System Order to maintain the source system sort order.

1. Go to **Application Control Manager > Administration > Metadata > Source System Import**.
2. Select **Retain Source System Order**



The screenshot shows the 'Source System Import' configuration page in the Application Control Manager. The 'Retain Source System Order' checkbox is checked. Below the checkbox is a table titled 'Data Management Steps' with the following data:

Group Name	Name	Description
Application Control Manager Metadata Import (ACM)	Commit_ACM	
Application Control Manager Metadata Import (ACM)	Load Accounts_ACM	
Application Control Manager Metadata Import (ACM)	Load Entities_ACM	
Application Control Manager Metadata Import (ACM)	Load UD1_ACM	
Application Control Manager Metadata Import (ACM)	Load UD2_ACM	
Application Control Manager Metadata Import (ACM)	Load UD3_ACM	

Retain Source System import performs the following processes:

- Imports the Metadata into the staging table with the sort order specified in the file.
- Generates a request if the sort order is changed when imported.
- Commits sort order changes in the correct order as specified by the import template.

Security

Allows you to enable or disable actions to govern user security-type requests. You cannot add actions.

Application Control Manager Dashboard

SECURITY OPTIONS		
Actions		
Name	Label	Enabled
ADD	Add New User	<input checked="" type="checkbox"/>
REMOVE	Remove Existing User	<input checked="" type="checkbox"/>
UPDATE	Update Existing User	<input checked="" type="checkbox"/>

- **Name:** Unique name for the action.
- **Label:** Display name for the action.
- **Enabled:** Enable or disable the action.

Properties

Properties table contains a list of fields that can be assigned to a view. Once assigned, users will be allowed to update the values of those properties. There are two types of properties:

- OneStream defined properties, such as any of the built-in metadata properties. The following are default OneStream properties that are pre-installed in the table:
 - OneStream metadata properties for the supported dimensions.
 - OneStream relationship properties.
 - OneStream user security properties.
- Custom properties leverage OneStream components to provide specific functionality for Application Control Manager. The following custom properties are pre-installed in the table:
 - Parent Member Selector: Member selector specifically for a Parent property, to distinguish from a default Member Selector for other properties.
 - Member Selector: Member selector that pulls properties from an existing member. This is used to create a new member in an alternate hierarchy.
 - Security Group Selector: Member selector that pulls from security groups.

Application Control Manager Dashboard

- **Alternate Hierarchy:** Member selector that creates a copy of the current item and creates the new member in an alternate hierarchy.
- **Varying Member Property Selector:** Member selector for selecting Scenario Type, Cube Type, or Time Value for varying properties.

You can also create and add custom properties in Application Control Manager to support your organization needs.

Properties Tab

Flow Type	Property Name	Label	Flow Property?	Component Type
Metadata	AccountType	Account Type	<input type="checkbox"/>	Combo Box
Metadata	AdjustmentType	Adjustment Type	<input type="checkbox"/>	Varying Member f
Metadata	AggregationWeight	Aggregation Weight	<input type="checkbox"/>	Text Box

Flow Type: Specifies the type of flow this property belongs to. Available options are: Metadata, Security, and Generic.

Property Name: Unique property name.

Label: Descriptive label to be used across the solution.

Flow Property: Indicates if the property can be assigned at the flow level.

Component Type: List of dashboard components you can assign to a view. These are the same as the default OneStream components:

- Check Box
- Combo Box
- List Box
- Member Selector
- Text Box

Parameter Type: The type of parameter attached to the component:

Application Control Manager Dashboard

- Literal Value
- Input Value
- Delimited List
- Bound List
- Member List
- Member Dialog

Parameter Name: If necessary, select an existing parameter to populate choices in the delimited list and bound list.

Namespace: Indicates if the property is built in OneStream or is custom.

Default Value: Sets the default value for the property. The default value is blank.

Property Options (Optional): Name-value pairs used to override default settings throughout the solution. Property option values can be strings or parameters in the OneStream format, for example, `!!ParameterName!`.

- **IsName:** Indicates that this property is a Name property. Used for Custom Name properties.
- **IsDesc:** Indicates that this property is a Description property. Used for Custom Description properties.
- **IsRef:** Indicates that this is a Reference member.
- **IsParentName:** Indicates that this property is a Parent Name. Used for Custom Parent properties.
- **PropName:** Used for custom properties. Set the OneStream property this should update.
- **DimTypeName:** Overrides the default DimTypeName on Member Selector type components.
- **Dimension:** Overrides the default Dimension on Member Selector type components.
- **MemberFilter:** Overrides the default MemberFilter on Member Selector type components.
- **CubeName:** Overrides the default CubeName on Member Selector type components.
- **Tooltip:** Sets the tooltip on the component.

Varying Properties

The Varying Properties listed in the following categories can be added or modified using a user-initiated metadata request or source system import request:

- Vary by Cube Type
- Vary by Scenario Type
- Vary by Scenario Type and Time

The varying properties are differentiated by the following types:

- Account
 - Member Properties
 - Relationship Properties
- Entity
 - Member Properties
 - Relationship Properties
- UDs
 - Member Properties
 - Relationship Properties

Non-varying Properties

The Non-varying Properties listed below can be added or modified using a user-initiated metadata request or source system import:

- Entity
 - Position Within Parent
 - Position

- Default Parent
 - Parent Sort Order
- Account and UDs
 - Position within Parent
 - Position
 - Aggregation
 - Aggregation Weight

Security Properties

The following are OneStream defined User Security properties that are pre-installed in the application. These properties can be assigned to a user-initiated request:

- Culture
- Description
- Email
- External Auth Provider Name
- External Auth User Name
- Grid Rows per Page
- Security Groups
- Enabled
- User Name
- Text 1
- Text 2
- Text 3
- Text 4

Application Control Manager Dashboard

- UserName
- UserType
 - **Interactive:** Allows all functionality. The user type defaults to Interactive for new users and upgrades.
 - **View:** Allows users to view all data, reports, and dashboards in the production environment and the derived database. The View user privileges do not permit the authorized user to load, calculate, consolidate, certify, or change data.
 - **Restricted:** Assigns contractual limits for certain functional tasks, such as limiting rights to solutions such as Account Reconciliation or Lease.
 - **Third Party Access:** Allows OneStream access using a named account, and logging on interactively using a third-party application. There is no access using the OneStream Windows application or the OneStream browser interface. The user cannot change data or modify OneStream application artifacts.
 - **Financial Close:** Allows users to perform Account Reconciliation solutions or Transaction Matching.

Categories Tab

Property categories are used to organize similar properties or dimension-specific properties into groups. Category groups are listed on the left. The properties assigned to the group are on the right.

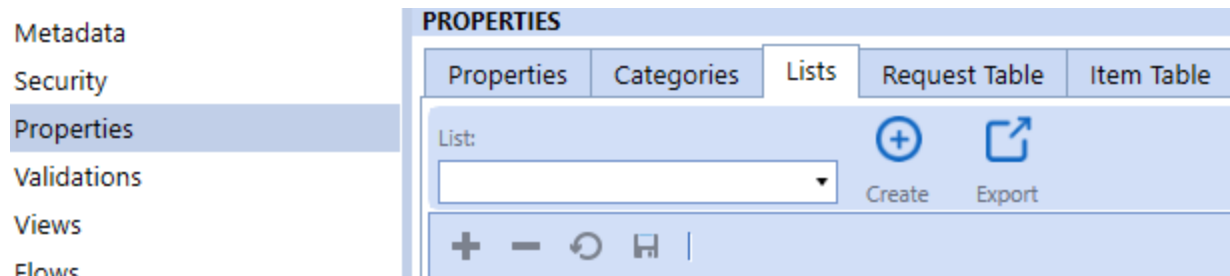
PROPERTIES	
Categories	
Name	Description
All	All Properties
Flow	Flow Properties
Metadata	Metadata Properties
OS	Onestream Properties
Security	User Security Properties

Property
Reference Account (ReferenceAccount)
Culture (UserCulture)
Reference UD7 (ReferenceUD7)
Reference UD6 (ReferenceUD6)
Text 2 (UserText2)
External Auth Provider Name (UserExternalAuthProviderName)
Text 4 (UserText4)
Email (UserEmail)
Reference UD4 (ReferenceUD4)
Reference UD2 (ReferenceUD2)

These property categories display when adding properties to views.

Lists Tab

On the Lists tab, you can create name-value pair lists to be used as references in properties. An example of how you might use a property list would be for a drop-down list in a property.



Click **Create** to create a new list.

- **Display:** Display text that a user sees when interacting with the list. Click **+** to add a new list member.
- **Value:** Value is used by the system when making changes.

Request Table and Item Table Tabs

The Request Table and Item Table tabs are system-generated and cannot be updated by the administrator.

Validations

Validations are business rules that run to verify that user input follows specific rules. A validation can be assigned to a property within a view. Application Control Manager is pre-installed with a list of default validations. You can also create and add custom validations to meet your organization needs.

Application Control Manager Dashboard

VALIDATIONS				
Validations				
Name	Label	Failure Message	Class	Parameters
CostCenterUD6Parent	Parent Should be JDE_DPT or SAP_DPT	JDE_DPT for JDE or SAP_DPT for SAP	Script	{ACM_Validations}{CheckFormat}{DimNameType=U
BaseNotAllowed	For Parent selection boxes, do not allow base members.	Selected Parent Member can not be a base member.	Script	{ACM_Validations}{BaseNotAllowed}{Dimension=JIT
ValidateNameCharacters	Do not allow invalid characters (ex. Spaces in names, any system restriction, etc.)	Name contains invalid characters.	Script	{ACM_Validations}{ValidateNameCharacters}()
CheckFormatCC	Account base formatting: CC_JDE_, CC_SAP_	Name must begin with: CC_JDE_ for JDE or CC_SAP_ for SAP	Script	{ACM_Validations}{CheckFormat}{DimNameType=JIT
ExistingUser	Check if User already exists	User with this Name already exists	Script	{ACM_Validations}{CheckUserExists}{FlowOption=JIT
InvalidCharactersDescription	Check for Invalid Characters	Description contains invalid characters	Script	{ACM_Validations}{InvalidCharacters}{DimNameType=JIT
CheckFormatEntity	Entity base formatting: ENT_	Name must begin with ENT_	Script	{ACM_Validations}{CheckFormat}{DimNameType=JIT
EntityText1Valid	Text 1 Options: JDE, OTH or SAP	Text 1 must be JDE, OTH or SAP depending on Cube	Script	{ACM_Validations}{CheckFormat}{DimNameType=JIT
ParentNotValidUD2	For Parent UD2 selection boxes, do not allow PC_PBU_ or OTH_ members as a parent.	Selected Parent Member can not be a base member. (PC_PBU_ or OTH_ members not allowed as parents)	Script	{ACM_Validations}{ParentNotValid}{DimNameType=JIT
CheckDateFormat	Make sure text is a Date	Please enter Active Date in "DD/MM/YYYY" Format	Script	{ACM_Validations}{CheckValidFormat}{Params={dd/mm/yyyy}}
MaxLength20	Max Length	Must be 20 characters or less	Script	{ACM_Validations}{CheckFormat}{MaxLength=20}
LengthEquals3	Length Restriction	Must be 3 characters long	Script	{ACM_Validations}{CheckFormat}{Length=3}
ExistingMember	Check if Member already exists	Member with this Name already exists	Script	{ACM_Validations}{CheckMemberExists}{Dimension=JIT

- Name:** Unique validation name.
- Label:** Description of validation.
- Failure Message:** Message that displays when the validation fails.
- Class:** All validations are set to script.
- Parameters:** The business rule and associated parameters needed to run the validation script.

Validation Assignment

There are two ways to assign a validation to a property in Application Control Manager, directly in the Validation administration page or using the View editor (refer to View editor section for more info).

Validations Properties			
MaxLength20			
Assigned Views	View Label	Assigned Properties	
sample	sample	Name	

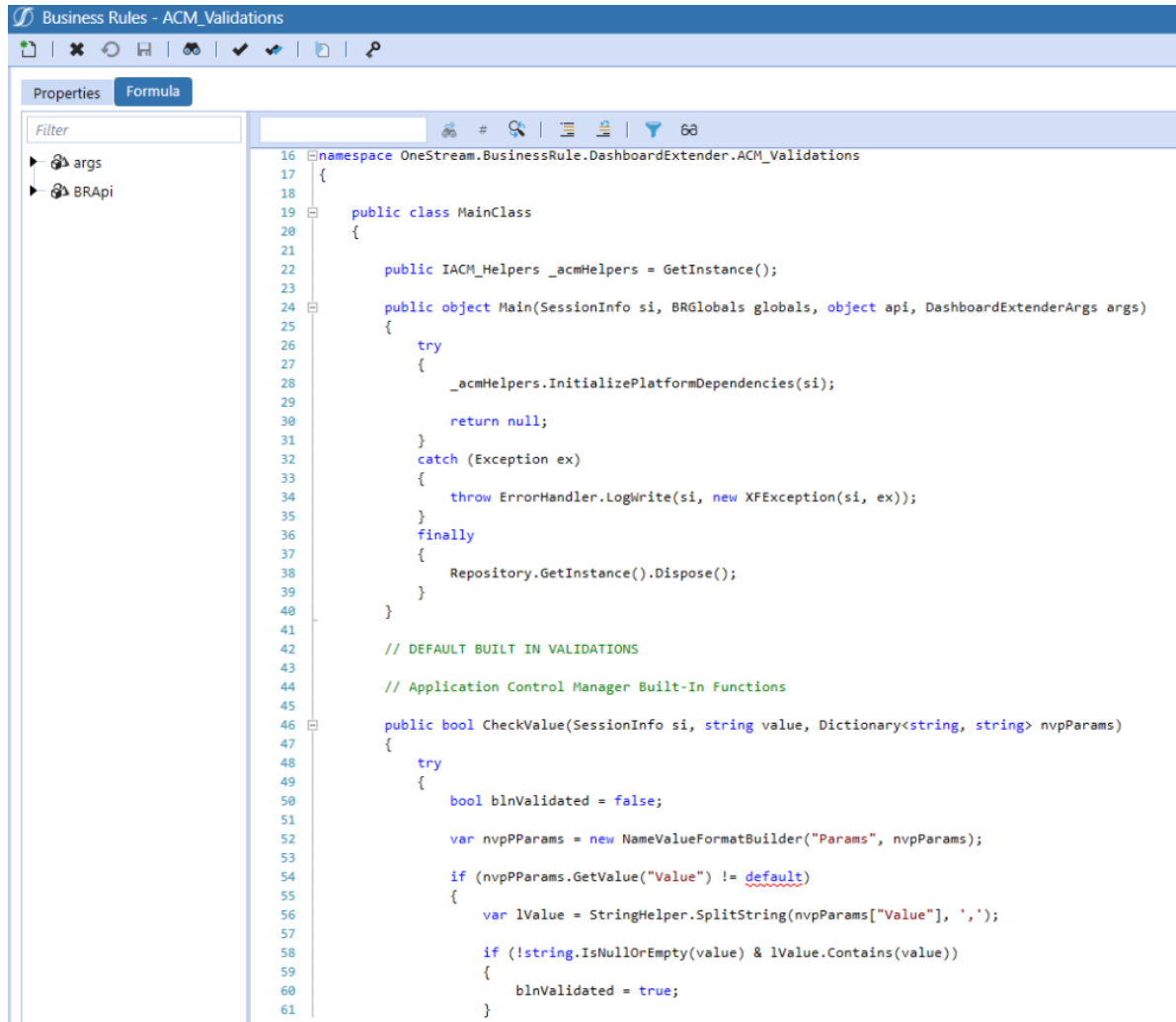
Validations : Use this to select the view you want to assign the validation to.

Application Control Manager Dashboard

Properties : Once the view has been selected, use this to select the specific property to apply the validation.

Validation Business Rules

To run properly, all validation scripts should be created in the ACM_Validations business rule.



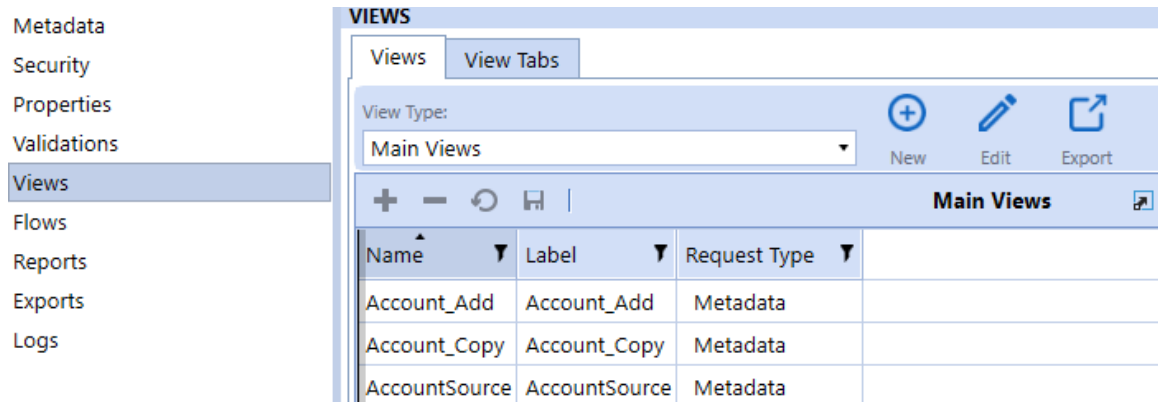
```
16 namespace OneStream.BusinessRule.DashboardExtender.ACM_Validations
17 {
18
19     public class MainClass
20     {
21
22         public IACM_Helpers _acmHelpers = GetInstance();
23
24         public object Main(SessionInfo si, BRGlobals globals, object api, DashboardExtenderArgs args)
25         {
26             try
27             {
28                 _acmHelpers.InitializePlatformDependencies(si);
29
30                 return null;
31             }
32             catch (Exception ex)
33             {
34                 throw ErrorHandler.LogWrite(si, new XFException(si, ex));
35             }
36             finally
37             {
38                 Repository.GetInstance().Dispose();
39             }
40         }
41
42         // DEFAULT BUILT IN VALIDATIONS
43
44         // Application Control Manager Built-In Functions
45
46         public bool CheckValue(SessionInfo si, string value, Dictionary<string, string> nvpParams)
47         {
48             try
49             {
50                 bool blnValidated = false;
51
52                 var nvpPParams = new NameValueFormatBuilder("Params", nvpParams);
53
54                 if (nvpPParams.GetValue("Value") != default)
55                 {
56                     var lValue = StringHelper.SplitString(nvpParams["Value"], ',');
57
58                     if (!string.IsNullOrEmpty(value) & lValue.Contains(value))
59                     {
60                         blnValidated = true;
61                     }
62                 }
63             }
64             catch { }
65         }
66     }
67 }
```

Views

A view is what you want a user to see at an Application Control Manager step. Properties and validations are assigned to views and then the view is assigned to a flow step.

Views Tab

Click **New** and **Edit** to create and edit views.



Name: Unique view name.

Label: Description of view. It is helpful to include the dimension, step, and action.

Request Type: This is selected from a list after view creation. Available types are: Metadata, Security, and Generic.

View Editor

To see the details or to modify a view, select a view and then click **Edit**.

Properties Tab: Includes two lists: Available Properties and Assigned Properties.

Application Control Manager Dashboard

View Editor

Update

Name: Account_Add Flow Type: Metadata

Label: Account_Add

Properties | Validations

Filter: All

Available Properties - Metadata	
Name	Label
AdjustmentType	Adjustment Type
AllowAdjsFromChildren	Allow Adjustments From Children
AttributeMemberOperatorType1	Comparison Operator 1
AttributeMemberOperatorType2	Comparison Operator 2
AttributeMemberComparisonText1	Comparison Text 1
AttributeMemberComparisonText2	Comparison Text 2
CubeType	Cube Type
AttributeMemberExpressionType	Expression Type
Formula	Formula
FxForCalcDrillDown	Formula For Calculation Drilldown
ICMemberFilter	IC Member Filter
IsAttributeMember	Is Attribute Member





Assigned Properties		
Property	DisplayOrder	Editable
Parent Member Selector (SelectParentMember)	0	<input type="checkbox"/>
Name (Name)	1	<input type="checkbox"/>
Is IC Account (IsICAccount)	2	<input type="checkbox"/>

Close



The Filter drop-down list allows you to switch between property categories to see which properties are available to assign to the view.

Use the center arrows to add or remove the selected property or all properties to or from the assigned properties list.

Use the Assigned Properties toolbar to:

- : Move the selected property up in the display order.
- : Move the selected property down in the display order.
- : Toggle the editable property for all assigned properties.
- : Toggle the required property for all assigned properties.

Application Control Manager Dashboard

- : Toggle the calculated property for all assigned properties.
- : Open a window to select an existing view from which to copy all properties.

Assigned Properties						
Property	DisplayOrder	Editable	Required	Calculate	Custom Label	Options
Parent Name (ParentName)	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Name (Name)	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Account Name	
Default Description (Description)	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text1 (Text1)	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text2 (Text2)	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text3 (Text3)	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text4 (Text4)	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text5 (Text5)	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text6 (Text6)	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text7 (Text7)	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Text8 (Text8)	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

After you assign the property to the view, configure the following settings:

- **Display Order:** The order of properties displayed in the view. Duplication in display order will cause an error when processing source system import.
- **Editable:** Indicates if the property can be edited.
- **Required:** Indicates if the property is required. If True, it will not pass validation if a required property is blank.
- **Calculated:** Indicates if the property is calculated based on another property.
- **Custom Label:** Overrides the property label.
- **Options:** Name-value pairs that are used for solution functionality.
 - **Tooltip:** Overrides the property tooltip.
 - **UseRef:** Use the property values from the Reference member assigned in the view.
 - **DimTypeName:** Overrides the DimTypeName for the property.

Validations Tab: Assign validations to views.

Application Control Manager Dashboard

1. Use the arrows to assign validations to specific properties within the view.

The screenshot shows the 'Validations' tab in the Application Control Manager dashboard. It features two main panels: 'Available Validations' on the left and 'Assigned Validations' on the right. The 'Available Validations' panel contains a table with the following data:

Name	Label
CheckDateFormat	Make sure text is a Date
CheckFormatCC	Account base formatting: CC_JDE_, CC_SAP_
CheckFormatEntity	Entity base formatting: ENT_
CostCenterUD6Parent	Parent Should be JDE_DPT or SAP_DPT
EntityText1Valid	Text 1 Options: JDE, OTH or SAP
ExistingUser	Check if User already exists
InvalidCharactersDescription	Check for Invalid Characters
LengthEquals3	Length Restriction
ParentNotValidUD2	For Parent UD2 selection boxes, do not allow PC
ValidateNameCharacters	Do not allow invalid characters (ex. Spaces in na

Navigation arrows (double right arrow, single right arrow, single left arrow, double left arrow) are positioned between the two panels. The 'Assigned Validations' panel on the right contains a table with the following data:

Validation	Properties
BaseNotAllowed	
ExistingMember	
MaxLength20	

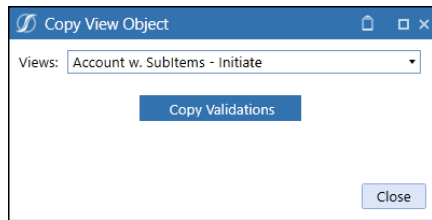
2. Complete one of the following actions:

- Select an assigned validation and then click the pencil to assign the validation to one or more properties.

The screenshot shows the 'Validations' tab in the Application Control Manager dashboard. The 'Available Validations' panel on the left has the 'LengthEquals3' validation selected. The 'Assigned Validations' panel on the right shows the 'MaxLength20' validation assigned to the 'Description' property. A pencil icon is visible in the top right corner of the 'Assigned Validations' panel, indicating the action being performed.

Application Control Manager Dashboard

- Click Copy to copy validations from another view.
- From the drop-down box, select the view to copy from and then click **Copy Validations**.



Flows

Flows represent the entire request approval process that a user completes when creating a request. You can define the steps or stages of the approval, notification setting for each step, security group, actions type, and views assignment for the Flow.

Metadata
Security
Properties
Validations
Views
Flows
Reports
Exports
Logs

FLWS

Flows

New Edit Copy Create Create All Delete All Export

+ - ↺ |

FlowOrder	Name	Label	Request Type	SecurityGroup	Enabled
1	EntitySource	EntitySource	Metadata	Everyone	<input type="checkbox"/>
2	AccountSource	AccountSource	Metadata	Everyone	<input type="checkbox"/>
3	UD1Source	UD1Source	Metadata	Everyone	<input type="checkbox"/>
4	UD2Source	UD2Source	Metadata	Everyone	<input type="checkbox"/>
5	UD3Source	UD3Source	Metadata	Everyone	<input type="checkbox"/>
6	UD4Source	UD4Source	Metadata	Everyone	<input type="checkbox"/>
7	UD5Source	UD5Source	Metadata	Everyone	<input type="checkbox"/>
8	UD6Source	UD6Source	Metadata	Everyone	<input type="checkbox"/>
9	UD7Source	UD7Source	Metadata	Everyone	<input type="checkbox"/>
10	UD8Source	UD8Source	Metadata	Everyone	<input type="checkbox"/>
11	Account_Test	Account_Test	Metadata	Everyone	<input checked="" type="checkbox"/>
12	UD1_Migration	UD1_Migration	Metadata	Everyone	<input checked="" type="checkbox"/>

Flow Editor

New: Create a new flow.

Application Control Manager Dashboard

Edit: Edit a flow.

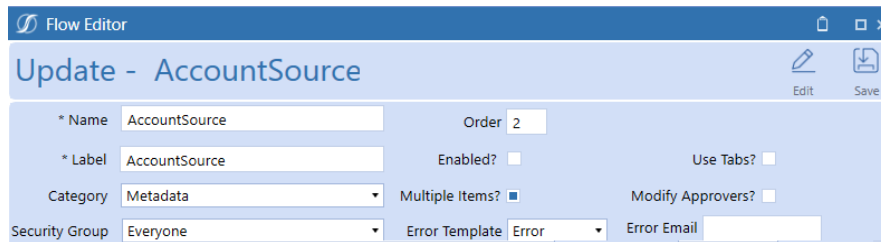
Copy: Copy a flow.

Create: Create dynamic dashboard components for the selected flow.

Create All: Create dynamic dashboard components for all flows.

Delete All: Deletes all dynamic dashboard components for all flows.

Export: Export flows to a .csv file for review in Excel or another text editor.



The screenshot shows the 'Flow Editor' window with the title 'Update - AccountSource'. The interface includes an 'Edit' button and a 'Save' button. The configuration fields are as follows:

* Name	AccountSource	Order	2		
* Label	AccountSource	Enabled?	<input type="checkbox"/>	Use Tabs?	<input type="checkbox"/>
Category	Metadata	Multiple Items?	<input checked="" type="checkbox"/>	Modify Approvers?	<input type="checkbox"/>
Security Group	Everyone	Error Template	Error	Error Email	

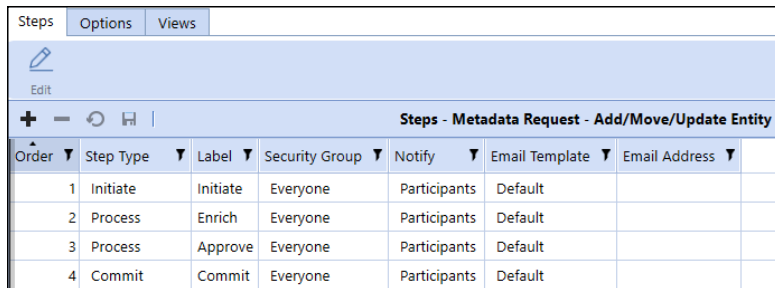
- **Name:** Unique request flow name.
- **Label:** Descriptive label that users see for the request type.
- **Category:** Available options are: Metadata, Security, and Generic.
- **Security Group:** Indicates who can initiate these types of requests.
- **Order:** The order the request type displays in the drop-down list when a user creates a new request.
- **Enabled:** Determines if the request type is visible in the new request drop-down list.
- **Multiple Items?:** Determines if the request allows more than one item in the request.
- **Error Template:** Email template sent out for errors at the flow level.
- **Use Tabs?:** Determines if the flow is using multiple tab views.
- **Modify Approvers?:** Determines if the user is allowed to select the approver from a drop-down list.
- **Error Email:** Email group that receives flow error emails.

Application Control Manager Dashboard

- **Edit Button:** Allows you to add a flow property to the flow level.
- **Save Button:** Saves updates made to the flow header.

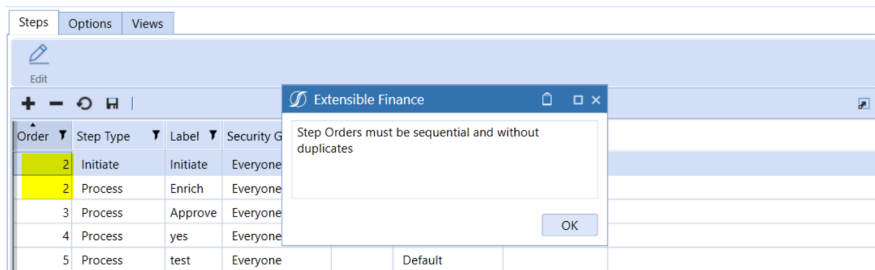
Steps Tab

Steps represents the different stages a request should go through.



Order	Step Type	Label	Security Group	Notify	Email Template	Email Address
1	Initiate	Initiate	Everyone	Participants	Default	
2	Process	Enrich	Everyone	Participants	Default	
3	Process	Approve	Everyone	Participants	Default	
4	Commit	Commit	Everyone	Participants	Default	

- **Order:** Step order. The Initiate step is the first step and the Commit step is the last step for metadata requests. When creating flows on the Steps tab, the step order must be sequential and cannot be duplicated. Validations are present to ensure the step order and duplication are identified.



- **Step Type:** These are the five available built-in step types.
 - Initiate
 - Process
 - Commit
 - Migrate
 - Export

Application Control Manager Dashboard

- **Label:** Unique label for flow-step combination.
- **Security Group:** Specify which group of users has access at each step.
- **Notify:** Select who gets notified on this step.

NOTE: Not currently implemented, only notifies email address defined.

- None, Assignees, Participants, Assignees and Participants

- **Email Template:** Select the email template to use for notification.
- **Email Address:** Email group to be notified when the request is at the current step.

Options Tab

For Metadata request types, assign the dimensions to work with on this request type and then assign the actions to perform for each dimension.

Steps	Options	Views
Flow Dimension: CorpEntities Assign		
Flow Options		
Dimension	Actions	
HoustonEntities	ADD,MOVE,UPDATE	

Assign Actions

Available	Assigned
COPY	ADD
REMOVE	MOVE
	UPDATE

Views Tab

Application Control Manager Dashboard

The Views tab allows administrators to assign the previously created views to each individual step-dimension-action in the flow process. If the views have not been created, you can also access the View Editor from here. The view assignment label list is automatically created when you add a new step or option. You must select the Assigned View from the drop-down list.

Steps Options Views			
Refresh New Edit Create			
+ - ↺ H View Assignments			
Step	ViewAssignmentLabel	Options	Assigned View
Approve	(Approve) [HoustonEntities,ADD]	HoustonEntities,ADD	Entity - Add - Approve
Approve	(Approve) [HoustonEntities,MOVE]	HoustonEntities,MOVE	Entity Move - Enrich Approve
Approve	(Approve) [HoustonEntities,UPDATE]	HoustonEntities,UPDATE	Entity - Add - Approve
Enrich	(Enrich) [HoustonEntities,ADD]	HoustonEntities,ADD	Entity - Add - Enrich
Enrich	(Enrich) [HoustonEntities,MOVE]	HoustonEntities,MOVE	Entity Move - Enrich Approve
Enrich	(Enrich) [HoustonEntities,UPDATE]	HoustonEntities,UPDATE	Entity - Add - Enrich

NOTE: Refresh: If the View Assignment list looks incorrect or not up to date, click **Refresh** to manually refresh the list.

New: Create a view.

Edit: View the details or edit an assigned view. Select the view step and then click Edit.

Create: Create dynamic dashboard components for the flow.

Create Dynamic Dashboard for Flow Views

After you create the flow and assign the views to each flow step, or anytime after you modify the flow options, you must run a process to create the dashboard components. Go back to the main Flows screen, select the flow, and click Create.

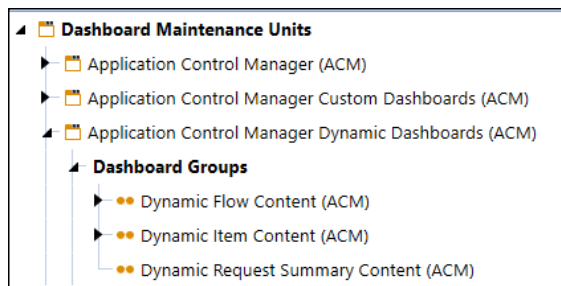
Application Control Manager Dashboard

Flows

New Edit Copy Create Create All Delete All Export

FlowOrder	Name	Label	Request Type	SecurityGroup	Enabled
0	Sample_Security	Security	Security	Everyone	<input type="checkbox"/>
1	EntitySource	EntitySource	Metadata	Everyone	<input checked="" type="checkbox"/>
2	AccountSource	AccountSource	Metadata	Everyone	<input type="checkbox"/>
3	UD1Source	UD1Source	Metadata	Everyone	<input type="checkbox"/>
4	UD2Source	UD2Source	Metadata	Everyone	<input type="checkbox"/>
5	UD3Source	UD3Source	Metadata	Everyone	<input type="checkbox"/>
6	UD4Source	UD4Source	Metadata	Everyone	<input type="checkbox"/>
7	UD5Source	UD5Source	Metadata	Everyone	<input type="checkbox"/>
8	UD6Source	UD6Source	Metadata	Everyone	<input type="checkbox"/>
9	UD7Source	UD7Source	Metadata	Everyone	<input type="checkbox"/>
10	UD8Source	UD8Source	Metadata	Everyone	<input type="checkbox"/>
11	Account_Test	Account_Test	Metadata	Everyone	<input checked="" type="checkbox"/>
11	Copy_Test	Account_Test	Metadata	Everyone	<input checked="" type="checkbox"/>
12	UD1_Migration	UD1_Migration	Metadata	Everyone	<input checked="" type="checkbox"/>

The dynamic dashboards are created in a specific Dashboard Maintenance Unit named Application Control Manager Dynamic Dashboards (ACM). The dashboards can be reviewed here.



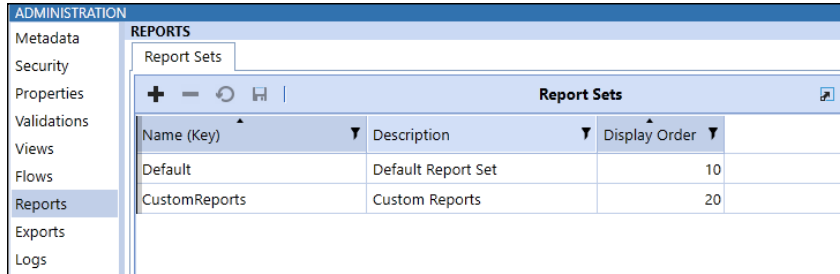
IMPORTANT: Do not make updates to the Dashboard here because any changes are overwritten when the Create process runs. Only make updates using the View or Flow Editor.

Reports Setup

The Reports page allows you to set up report sets for access through the Application Control Manager Reporting page. A set of default reports are pre-installed with the application (refer to the Reports section for more info). You can also create custom report to meet your organization needs (refer to Create Custom Reports section for more info).





Report Sets

Use to group Application Control Manager reports into report sets.



The screenshot shows the 'ADMINISTRATION' section of the Application Control Manager interface. The 'REPORTS' tab is selected, and the 'Report Sets' sub-tab is active. A table titled 'Report Sets' is displayed with the following data:

Name (Key)	Description	Display Order
Default	Default Report Set	10
CustomReports	Custom Reports	20

- : Add a new report set.
- : Delete a selected report set.
- : Undo unsaved changes.
- : Save changes to the report sets.

The workspace has three main columns:





- **Name (Key):** Unique name for the report set.
- **Description:** More detailed description of the report set.
- **Display Order:** Arrange your report sets in numerical order.

Reports

When you click on a report set, the lower pane opens where you can add the reports to the set.

Application Control Manager Dashboard

Default Reports					
Name (Key)	Display Name	Enabled	Display Order	Security Group	Dashboard Name
RequestAudit	Request Audit	<input checked="" type="checkbox"/>	100	Everyone	RequestAudit_ACM
RequestAuditByType	Request Audit By Request	<input checked="" type="checkbox"/>	110	Everyone	RequestByTypeAudit_ACM
RequestAuditByStatus	Request Audit By Status	<input checked="" type="checkbox"/>	120	Everyone	RequestByStatusAudit_ACM
RequestAuditByStep	Request Audit By Step Type	<input checked="" type="checkbox"/>	130	Everyone	RequestByStepType_ACM
RequestAuditWithItem	Request Audit with Item Detail	<input checked="" type="checkbox"/>	200	Everyone	RequestWithItemDetailAudit_ACM
RequestAutoItemDetail	Automated Request Audit	<input checked="" type="checkbox"/>	210	Everyone	RequestAutoItemDetail_ACM
MetadataDetailAudit	Metadata Detail Audit	<input type="checkbox"/>	500	Everyone	MetadataDetailAudit_ACM
ActivityLogAudit	Request Activity Audit	<input checked="" type="checkbox"/>	1000	Everyone	ActivityLog_ACM
BridgeMetadataAudit	Bridge Metadata Audit	<input checked="" type="checkbox"/>	1100	Everyone	BridgeMetadataAudit_ACM

-  : Add a report to the set.
-  : Delete a selected report from the set.
-  : Undo unsaved changes.
-  : Save changes to the report.

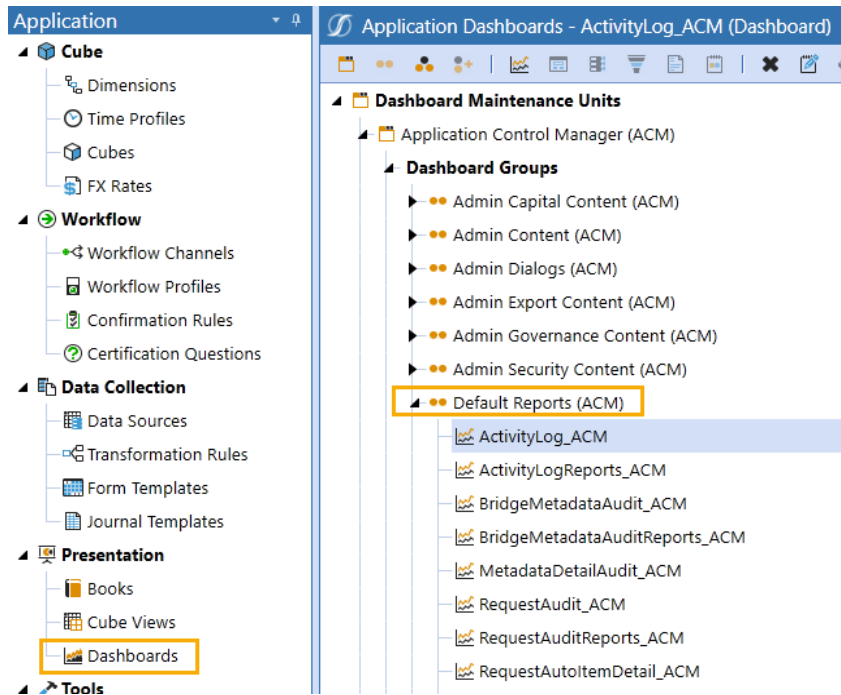
The dashboard has six columns:

- **Name(Key)**: Unique name for the report.
- **Display Name**: The name of the report displayed to the end user.
- **Enabled**: Determines if the report in the set can be seen by the end user.
- **Display Order**: Arranges reports in numerical order.
- **Security Group**: Assigns the OneStream security group that can view this report.
- **Dashboard Name**: Name of the report dashboard in Application Control Manager.

The reports dashboard groups are in Application > Presentation > Dashboards > Application Control Manager (ACM).

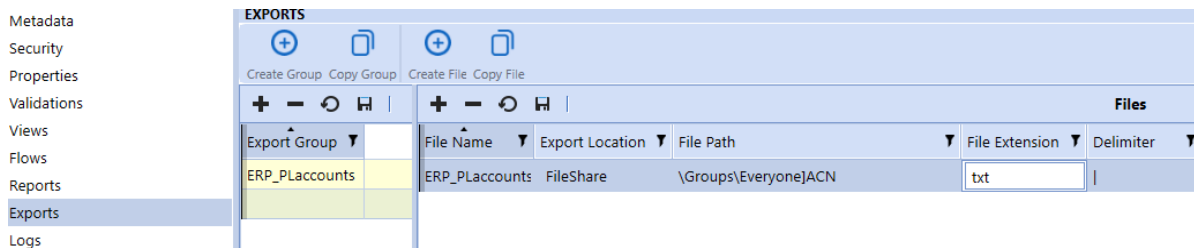
There are reports that come with Application Control Manager and are listed under Default Reports.

Application Control Manager Dashboard



Exports

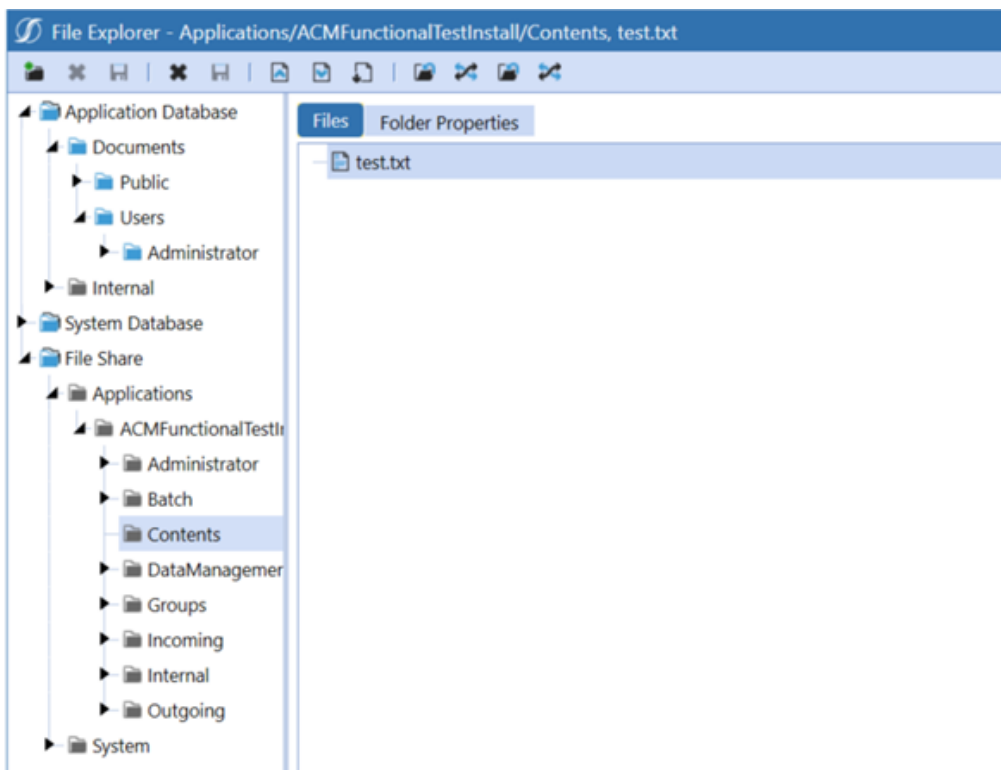
On the Exports page, you can create and copy export groups and files.



- **File Name:** The title of the file.
- **Export Location:** The file location after it is exported.
 - Local
 - User Folder
 - File Share

Application Control Manager Dashboard

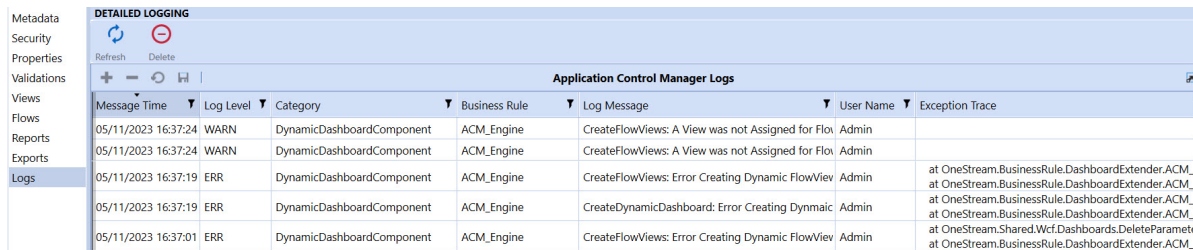
- Application Database
- External
- **File Path:** The location of the file.
- **File Extension:** File extension examples are .txt. and .csv.
- **Delimiter:** Delimiters are used to separate the export properties on file.
- **OverwriteFile:** If selected, the file can be overwritten.
- **HasHeader:** Indicates if the file has a header row.
- **PropsInRow:** If selected, properties in the row can be set.
- **FilterActions:** This setting is used to specify if only certain actions are allowed to get exported. If not selected, all actions are included in the file.
- **FileActions:** Actions that can be added to the file such as add, modify, and remove.



Logs

Application Control Manager has detailed logging where administrators can view all of the processing events including errors that have occurred in the solution.

NOTE: Detailed Logging check box must be checked off under Global Options.



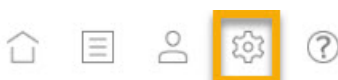
Message Time	Log Level	Category	Business Rule	Log Message	User Name	Exception Trace
05/11/2023 16:37:24	WARN	DynamicDashboardComponent	ACM_Engine	CreateFlowViews: A View was not Assigned for Flo	Admin	
05/11/2023 16:37:24	WARN	DynamicDashboardComponent	ACM_Engine	CreateFlowViews: A View was not Assigned for Flo	Admin	
05/11/2023 16:37:19	ERR	DynamicDashboardComponent	ACM_Engine	CreateFlowViews: Error Creating Dynamic FlowView	Admin	at OneStream.BusinessRule.DashboardExtender.ACM, at OneStream.BusinessRule.DashboardExtender.ACM,
05/11/2023 16:37:19	ERR	DynamicDashboardComponent	ACM_Engine	CreateDynamicDashboard: Error Creating Dynmaic	Admin	at OneStream.BusinessRule.DashboardExtender.ACM, at OneStream.BusinessRule.DashboardExtender.ACM,
05/11/2023 16:37:01	ERR	DynamicDashboardComponent	ACM_Engine	CreateFlowViews: Error Creating Dynamic FlowView	Admin	at OneStream.Shared.Wcf.Dashboards.DeleteParamet at OneStream.BusinessRule.DashboardExtender.ACM,

Click **Refresh** to refresh the detailed logging screen. Click **Delete** to clear all Application Control Manager log files.

- **Message Time:** Time stamp for the activity.
- **Log Level:** Captures the type of Log item that was written (for example, Information, Warning, Error, or Fatal).
- **Category:** The organization of the system type that generated that Log Entry.
- **Business Rule:** Business Rule responsible for writing the Log Entry.
- **Log Message:** Description of the activity.
- **User Name:** Login name of the user who performed the activity.
- **Exception Trace:** The full path of the error. These breadcrumbs lead to the error.

Settings

The Settings page contains global solution configuration settings including initial setup, uninstall, and custom database table administration.

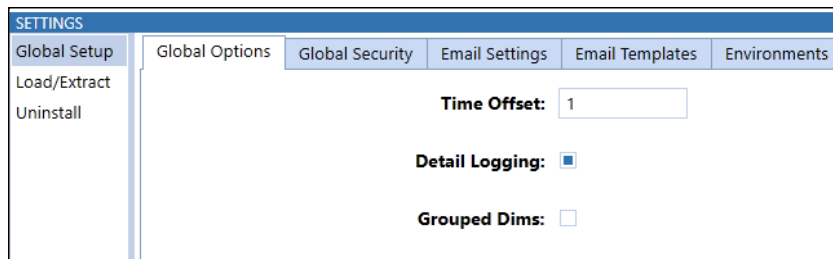


Global Setup

Most global settings are configured once during the initial installation and do not need to be updated on an ongoing basis. There are five tabs under the Global Setup:

Global Options

Global configuration options apply to the entire solution.



- **Time Offset:** Use to adjust the server time to the current time zone. This is the time stamp used on all activities in the solution. The value is the number of hours to adjust and can be a positive or negative number.
- **Detailed Logging:** Enable Logs under the Administration menu.
- **Grouped Dims:** Enable when one request needs to be applied to multiple dimensions.

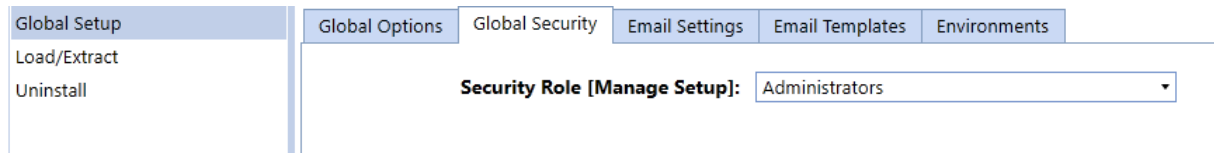
After **Grouped Dims** is enabled, the Grouped Dim column is visible on the Dimensions tab on the Metadata page under Admin.

Then the admin can enter multiple dimensions in the Grouped Dim columns. If there is a Grouped Dim assigned to a Flow, there will be one item created at initiation for the Grouped Dim that the user can enter data into. After the Request is moved to the next step, there are items created for each of the dimensions that make up the Grouped Dim. The Enricher or Approver will see two or more items that match up with that grouped dimension.

Global Security

The global security tab is where you can assign security on who can manage Application Control Manager.

Application Control Manager Dashboard

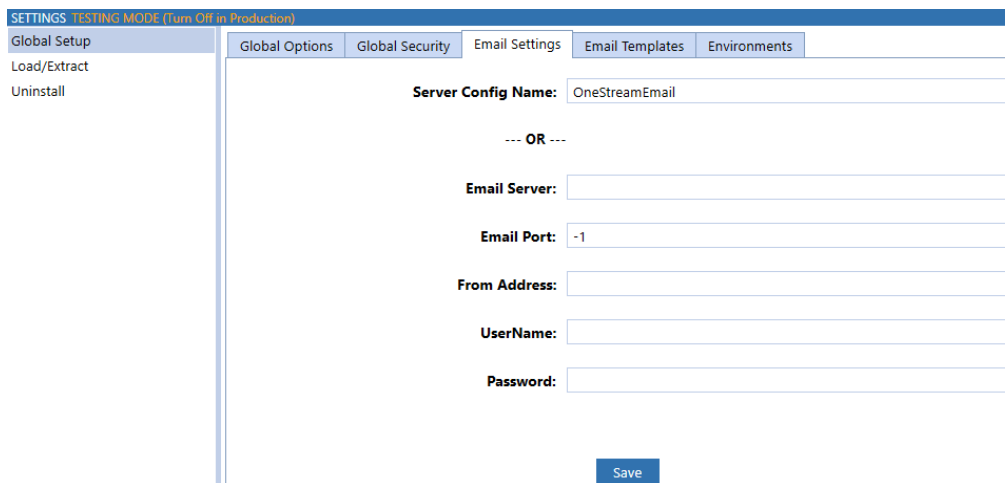


The screenshot shows the Application Control Manager Dashboard with the following navigation tabs: Global Setup, Global Options, Global Security, Email Settings, Email Templates, and Environments. The left sidebar contains links for Global Setup, Load/Extract, and Uninstall. The main content area displays the 'Security Role [Manage Setup]' dropdown menu, which is currently set to 'Administrators'.

- **Security Role [Manage Setup]:** Select the OneStream security group that will be the Application Control Manager Administrator.

Email Settings

Email settings allow you to set up the email server account used to send notifications from Application Control Manager. If this is the first time installing Application Control Manager, it is a good idea to click on the Save button under the email setting to register the email server with the application.



The screenshot shows the 'Email Settings' configuration page in the Application Control Manager. The page title is 'SETTINGS TESTING MODE (Turn Off in Production)'. The navigation tabs are Global Setup, Global Options, Global Security, Email Settings, Email Templates, and Environments. The left sidebar contains links for Global Setup, Load/Extract, and Uninstall. The main content area displays the following fields:

- Server Config Name:** OneStreamEmail
- OR ---**
- Email Server:** [Empty text input field]
- Email Port:** -1
- From Address:** [Empty text input field]
- UserName:** [Empty text input field]
- Password:** [Empty text input field]

A blue 'Save' button is located at the bottom of the form.

- **Server Config Name:** Uses the email connection defined on the OneStream server. Or you can set up a manual connection by filling in this information:
 - **Email server:** Email service address
 - **Email Port:** Port used by the email server settings
 - **From Address:** Email address which the messages should come from.

- **Username:** Email username for the account
- **Password:** Password for email account

Email Templates

Templates that are used for email notifications. Different email templates can be assigned to each stage of the request. You can create new templates using the placeholders in the subject and message of the email.


Global Options	Global Security	Email Settings	Email Templates	Environments
Email Templates				
Label ▼	Subject ▼	Message ▼		
Default	RequestID #requestid# Processing Information	Request ID: #RequestID# \nRequester: #Requester# was just advanced to the #FlowStepLabel# step		
Error	RequestID #requestid# Processing Failure	Error while processing request for the following reason: #message#		

Here's a sample email content:

RequestID R00000008 Processing Information



OSUser

To  FPA Approver

Request ID: R00000008

Requester: Initiator was just advanced to the Commit step

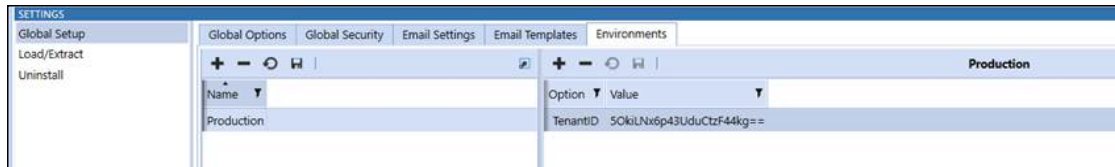
Email Placeholder Options

- FlowName
- FlowType
- FlowLabel
- FlowStepLabel

- FlowStepType
- Message
- Priority
- PriorFlowStepLabel
- RequestID
- Requester
- RequestStatus
- RequestReason
- RequestNextAction

Environments

Administrators can set up multiple environments to move metadata across environments. This environment configuration is required to utilize the Migrate functionality.



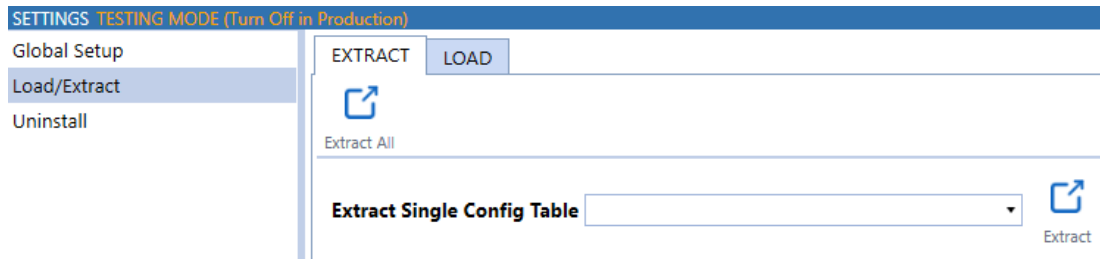
Load/Extract

This screen allows you to load and extract components or the entire Application Control Manager user interface.

Extract

Use to extract the configuration and components of Application Control Manager.

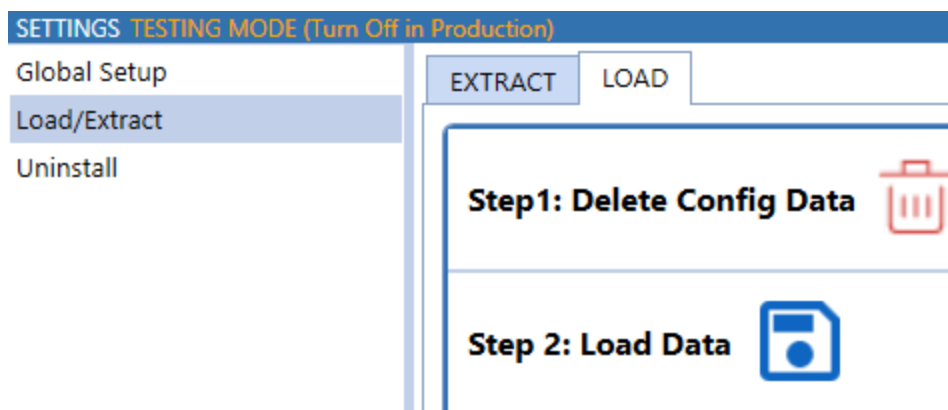
Application Control Manager Dashboard



- **Extract:** Select the specific configuration piece that you want to extract to a flat file for future import or backup.
- **Extract All Config Data:** Extracts all pieces of Application Control Manager configuration to a flat file for future import or backup.


Load

Use to delete and load the Application Control Manager configuration and components.



- **Delete Config Data:** Clears all current Application Control Manager configuration data (Metadata, Properties, Validations, Views, Flows). Use this before importing new configuration data from file.
- **Load Data:** Imports configuration data from file.

Uninstall

1. In the Application Control Manager Dashboard, click  and then, under **Settings**, click **Uninstall**.

2. Select an option:

- **Uninstall UI** to remove the dashboards, business rules and keep all the data in the database tables. This is useful when upgrading to a newer version of the solution.

NOTE: All open requests in Application Control Manager must be closed before performing an Uninstall UI.

- **Uninstall Full** to completely uninstall the solution including all components and data. This uninstalls the custom database tables and removes all dashboards. You can't recover from this unless you have backed up both the dashboards and data.

Administration Tasks

Create a New View

To create a new view for a Metadata request type:

1. Go to **Administration > Views**.
2. Create a new view.
3. Select **Metadata** from the Flow Type.
4. Click Save (this will allow you to add the Properties and Validations).
5. Move the corresponding property over. Use the Filter drop-down to toggle between different categories.
6. Save the view and close the **View Editor**.

To create a new view for a Security request type:

1. Go to **Administration > Views**.
2. Create a new view.
3. Select **Security** from the type.
4. Move the corresponding property over. Select Security from the Filter drop-down to see relevant properties.
5. Save the view and close the **View Editor**.

Create a New Flow

To create a new flow for a Metadata request type:

1. Go to **Administration > Flows**.
2. Create a new flow .

Administration Tasks

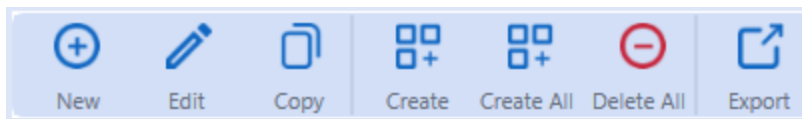
3. Create Name and Label (recommended to be the same).
4. Select Metadata from the Category list.
5. Click Save (this will allow you to add the Steps, Options, and Views).
6. On the **Steps** tab, add the steps for your approval workflow.
7. On the **Options** tab, assign the Dimension and Actions combination for this flow.
8. After all steps and options are added, on the **Views** tab, select the Assigned View for each Step and Option combination. (See [Create a New View](#)).
9. Ensure the flow is enabled to make it available in the **New Request** drop-down list.
10. Save the flow and close the **Flow Editor**.
11. Run the **Create Flow Views** process.

To create a new flow for a Security request type:

1. Go to **Administration > Flows**.
2. Create a new flow.
3. Create Name and Label (recommended to be the same).
4. Select Security from the Category List.
5. Click Save (this will allow you to add the Steps, Options, and Views).
6. On the **Steps** tab, add the steps for your approval workflow.
7. On the **Options** tab, assign the Security Actions for this flow.
8. After all steps and options are added, on the **Views** tab, select the Assigned View for each Step and Option combination. (See [Create a New View](#)).
9. Ensure the flow is enabled to make it available in the **New Request** drop-down list.
10. Save the flow and close the **Flow Editor**.
11. Run the **Create Flow Views** process.

Refreshing Dynamic View Dashboards

1. Make the changes to the flow that you want to update. Changes can be updating a label, adding or removing a property, changing the order of the properties, adding or removing steps in a flow, and views assignment.
2. Go to **Administration > Flows**.
3. Select the flow that you changed.
4. Click **Create**.



TIP: To refresh all dynamic dashboards, click **Create All**.

Create Custom Reports

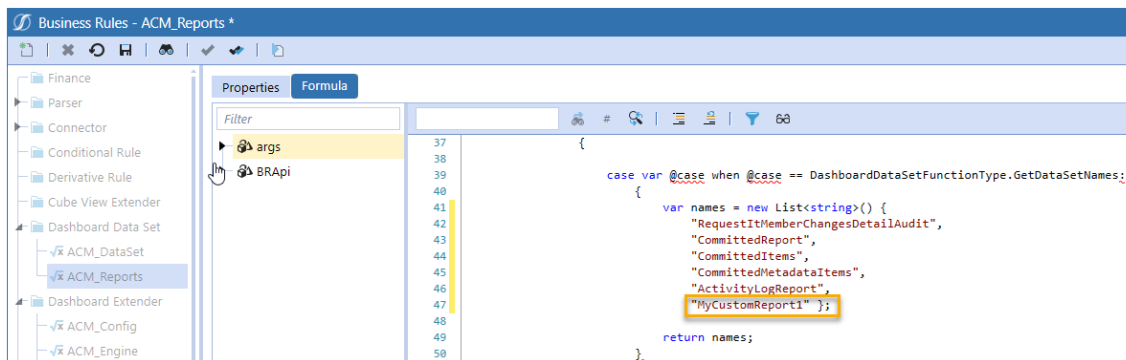
You can add custom reports using combinations of business rules, dashboard data adapters, dashboard components, and dashboards.

NOTE: Any custom reports that use custom components are removed when performing an **Uninstall UI**. The **ACM_Reports** business rule is overwritten during an upgrade. Any customizations to this business rule must be backed up and merged into the updated business rule.

Follow the sample steps below to add a new custom report to show the values of the custom properties **FlowReason** and **FlowPriority**.

1. Add the report definition to the **ACM_Reports** by navigating to **Business Rules > Dashboard Data Set > ACM_Reports**.
2. Add the report to the list of reports. Be sure to add the comma to the previous line.

Administration Tasks



3. Copy and paste rows 112-121 and update for the new report name.

```
112
113
114         else if (args.DataSetName.Equals("ActivityLogReport", StringComparison.InvariantCultureIgnoreCase))
115         {
116             // Get the Start / End Time parameters for Metadata Audit queries
117             string startTime = args.NameValuePairs["StartTime"];
118             string endTime = args.NameValuePairs["EndTime"];
119
120             return GetActivityLogReport(si, startTime, endTime);
121         }
122         else if (args.DataSetName.Equals("MyCustomReport1", StringComparison.InvariantCultureIgnoreCase))
123         {
124             // Get the Start / End Time parameters for Metadata Audit queries
125             string startTime = args.NameValuePairs["StartTime"];
126             string endTime = args.NameValuePairs["EndTime"];
127
128             return GetMyCustomReport1(si, startTime, endTime);
129         }
130     }
```

4. Insert the following code after line 331:

```
private DataTable GetMyCustomReport1(SessionInfo si, string startTime, string endTime)
{
    try
    {
        using (DbConnInfo dbConnFW = BRApi.Database.CreateFrameworkDbConnInfo(si))
        {
            using (DbConnInfo dbConnApp = BRApi.Database.CreateApplicationDbConnInfo(si))
            {
                endTime = endTime.Replace("/", "-") + " 23:59:59";

                // Create the data table to return
                var sql = new System.Text.StringBuilder();
                sql.Append("Select r.ID, r.RequesterID, r.Status, ");
                sql.Append("'Commit' As StepType, f.Label, r.LastModified, ");
                sql.Append("'" + startTime + "' As CriteriaStartTime, ");
                sql.Append("'" + endTime + "' As CriteriaEndTime, ");
                //For item level properties, use i.ItemProperties instead of r.RequestProperties
                sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowReason') As
FlowReason, ");
                sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowPriority') As
FlowPriority ");
            }
        }
    }
}
```

Administration Tasks

```
//FOR ITEM LEVEL PROPERTIES, UNCOMMENT NEXT 2 LINES
// sql.Append("From " + ACM_Globals.m_ItemView + " i ");
// sql.Append("RIGHT Join " + ACM_Globals.m_MasterRequestView + " r On i.FKRequestID
= r.RequestID ");
sql.Append("From " + ACM_Globals.m_MasterRequestView + " r ");
sql.Append("INNER JOIN " + ACM_Globals.m_StepTable + " s ON r.FKStepID = s.StepID
");
sql.Append("INNER JOIN " + ACM_Globals.m_FlowTable + " f ON r.FKFlowID = f.FlowID
");
sql.Append("WHERE s.StepType = 3 AND r.Status = 'Completed' AND ");
sql.Append("r.LastModified >= '" + startTime + "' And r.LastModified <= '" + endTime
+ "' ");
sql.Append("ORDER BY r.LastModified DESC");

using (var dt = BRApi.Database.ExecuteSql(dbConnApp, sql.ToString(), false))
{
    dt.TableName = "MyCustomReport1";
    return dt;
}
}
}
}
}
catch (Exception ex)
{
    Logger.Write(si, "Error getting Activity Log Report.", ACM_Globals.LogLevel.ERR, ACM_
Globals.LogCategory.AcmReports, ex);
    throw ErrorHandler.LogWrite(si, new XFException(si, ex));
}
}
```

This is what it will look like in the business rule:

```
private DataTable GetMyCustomReport1(SessionInfo si, string startTime, string endTime)
{
    try
    {
        using (DbConnInfo dbConnFW = BRApi.Database.CreateFrameworkDbConnInfo(si))
        {
            using (DbConnInfo dbConnApp = BRApi.Database.CreateApplicationDbConnInfo(si))
            {
                endTime = endTime.Replace("/", "-") + " 23:59:59";

                // Create the data table to return
                var sql = new System.Text.StringBuilder();
                sql.Append("SELECT r.ID, r.RequesterID, r.Status, ");
                sql.Append("'Commit' AS StepType, f.Label, r.LastModified, ");
                sql.Append("'" + startTime + "' AS CriteriaStartTime, ");
                sql.Append("'" + endTime + "' AS CriteriaEndTime, ");
                // For ITEM LEVEL Properties, use i.ItemProperties instead of
                sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowReason') AS
r.RequestProperties
FlowReason, ");
                sql.Append("JSON_Value(r.RequestProperties, '$.Properties.FlowPriority') AS
```

```
FlowPriority ");
        // For ITEM LEVEL Properties, UNCOMMENT NEXT 2 LINES
        // sql.Append("FROM " + ACM_Globals.m_ItemView + " i ");
        // sql.Append("RIGHT JOIN " + ACM_Globals.m_MasterRequestView + " r ON
i.FKRequestID = r.RequestID");
        sql.Append("FROM " + ACM_Globals.m_MasterRequestView + " r ");
        sql.Append("INNER JOIN " + ACM_Globals.m_StepTable + " s ON r.FKStepID =
s.StepID ");
        sql.Append("INNER JOIN " + ACM_Globals.m_FlowTable + " f ON r.FKFlowID =
f.FlowID ");
        sql.Append("WHERE s.StepType = 3 AND r.Status = 'Completed' AND ");
        sql.Append("r.LastModified >= '" + startTime + "' AND r.LastModified <= '" +
endTime + "' ");
        sql.Append("ORDER BY r.LastModified DESC");

        using (var dt = BRApi.Database.ExecuteSql(dbConnApp, sql.ToString(), false))
        {
            dt.TableName = "MyCustomReport1";
            return dt;
        }
    }
}
catch (Exception ex)
{
    throw ErrorHandler.LogWrite(si, new XFException(si, ex));
}
}
```

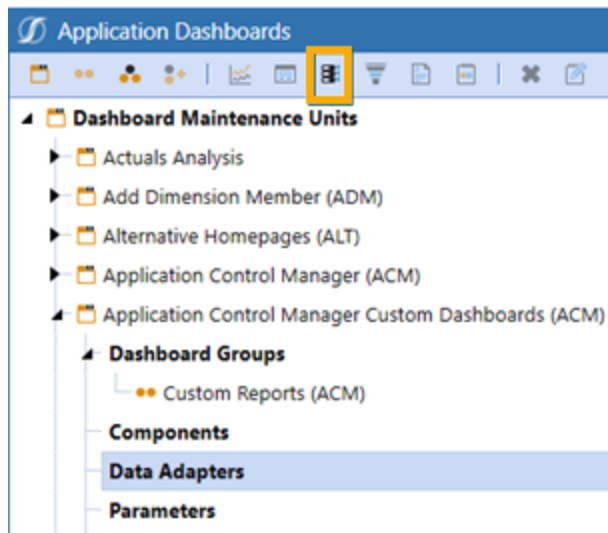
5. Compile the business rule to check the syntax.

Add Reports to the Application Control Manager Custom Dashboard

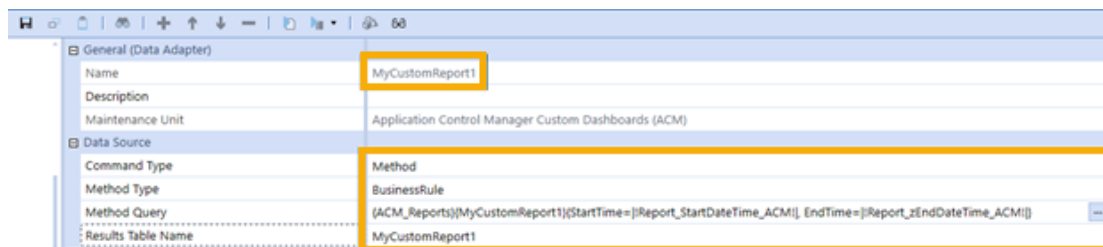
Add the reports to the Application Control Manager Custom dashboard as follows:

1. Click **Application Dashboards > Dashboard Maintenance Units > Data Adapters**.
2. Click **Create Data Adapter**.

Administration Tasks

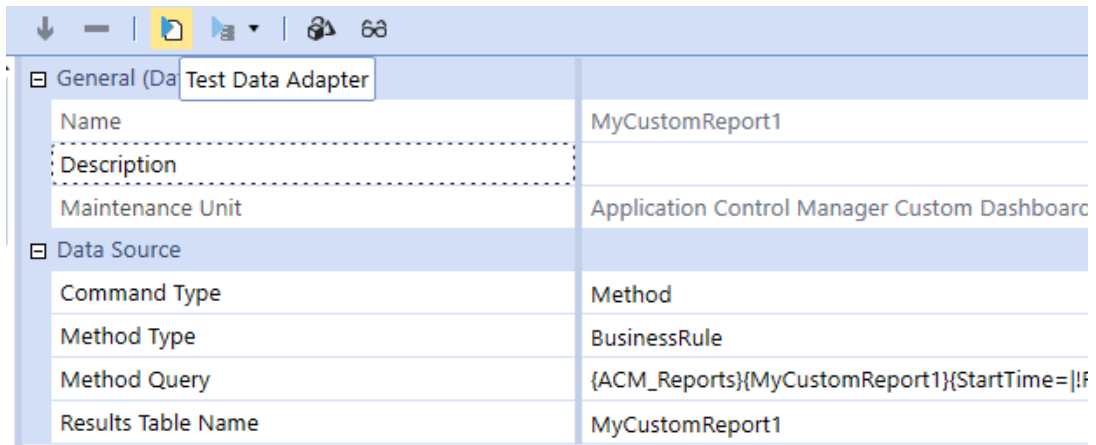


3. Enter a name for the data adapter.
4. For Command Type select **Method**.
5. For Method Type select **Business Rule**.
6. For **Method Query**, click the ellipsis and add the following:
`{ACM_Reports}{MyCustomReport1}{StartTime=|!Report_StartDateTime_ACM|, EndTime=|!Report_zEndDateTime_ACM!}`
7. In **Results Table Name** enter **MyCustomReport1**.



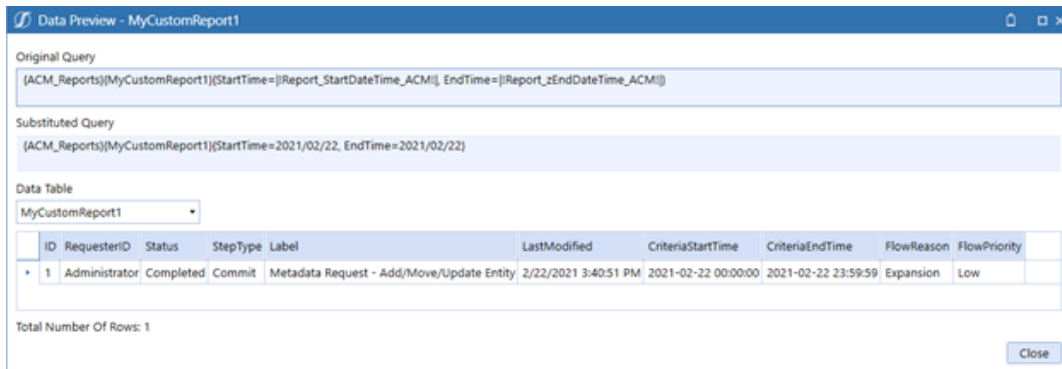
8. Click **Test Data Adapter** to test the adapter.

Administration Tasks



General (Data Adapter)	
Name	MyCustomReport1
Description	
Maintenance Unit	Application Control Manager Custom Dashboard
Data Source	
Command Type	Method
Method Type	BusinessRule
Method Query	{ACM_Reports}{MyCustomReport1}{StartTime= }
Results Table Name	MyCustomReport1

You should see similar results to this:



ID	RequesterID	Status	StepType	Label	LastModified	CriteriaStartTime	CriteriaEndTime	FlowReason	FlowPriority
1	Administrator	Completed	Commit	Metadata Request - Add/Move/Update Entity	2/22/2021 3:40:51 PM	2021-02-22 00:00:00	2021-02-22 23:59:59	Expansion	Low

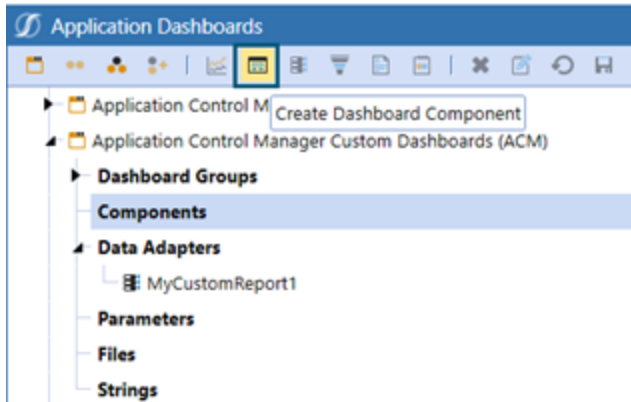
Total Number Of Rows: 1

Creating a Grid View Component

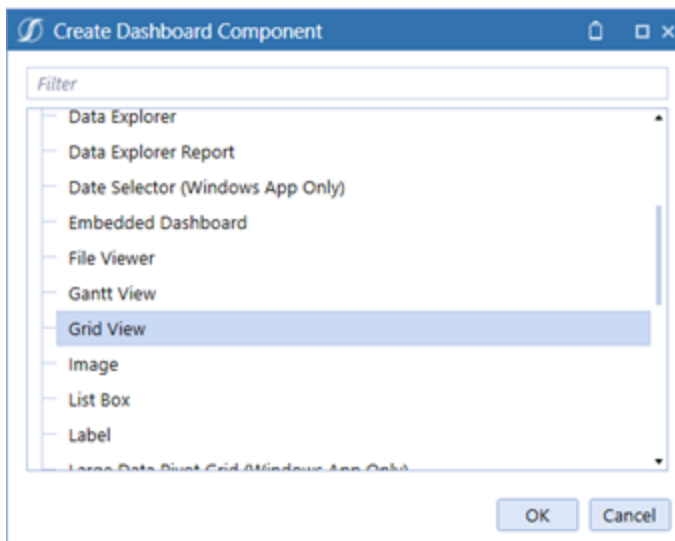
Perform the following steps to create a Grid View component.

Administration Tasks

1. Select **Components** and click **Create Dashboard Component**.

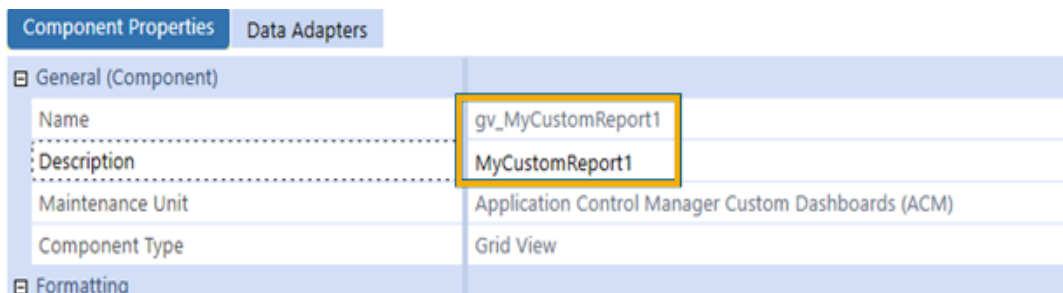


2. Scroll to select **Grid View**.

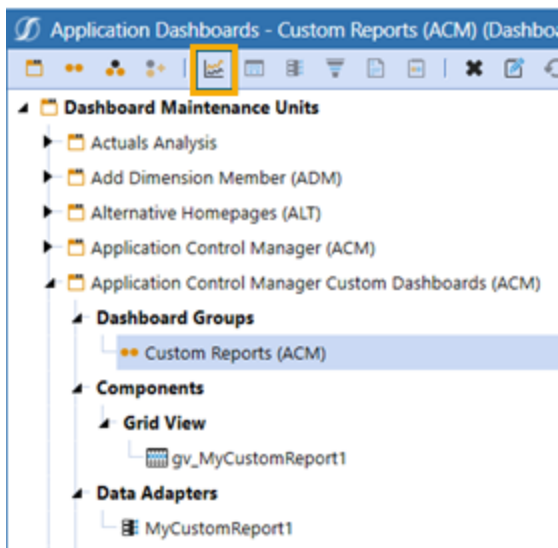


3. Input a **Name** and **Description** for the Grid View. Prefix components, using, in this case, "gv_" for Grid View. Click **OK**.

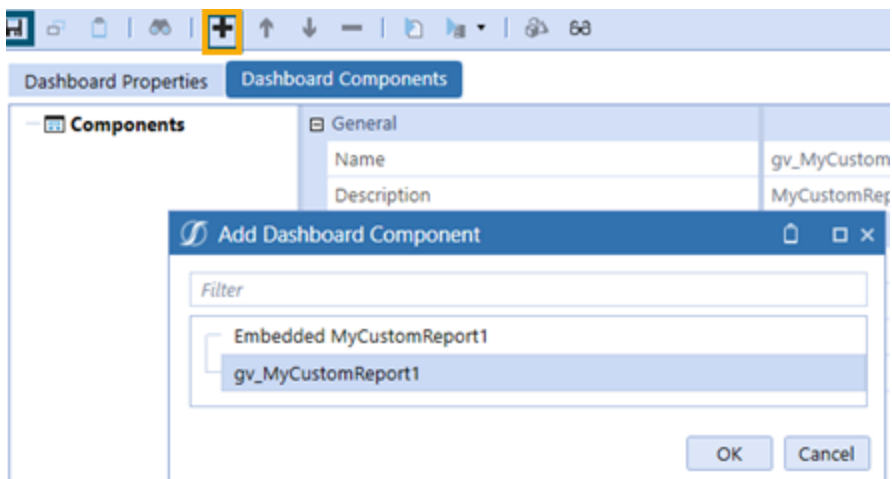
Administration Tasks



4. Click **Data Adapters** , the + icon, **MyCustomReport1** Data Adapter, then **OK**.
5. Navigate to and expand **Dashboard Groups**.
6. Select **Custom Reports** and click **Create Dashboard** .



7. Click **Save**.
8. Click **Add Dashboard Component**.
9. Select **gv_MyCustomReport1**.
10. Click **OK**, then **Save**.



11. Test the dashboard by clicking **View Dashboard**.

A successful dashboard test would look like this:



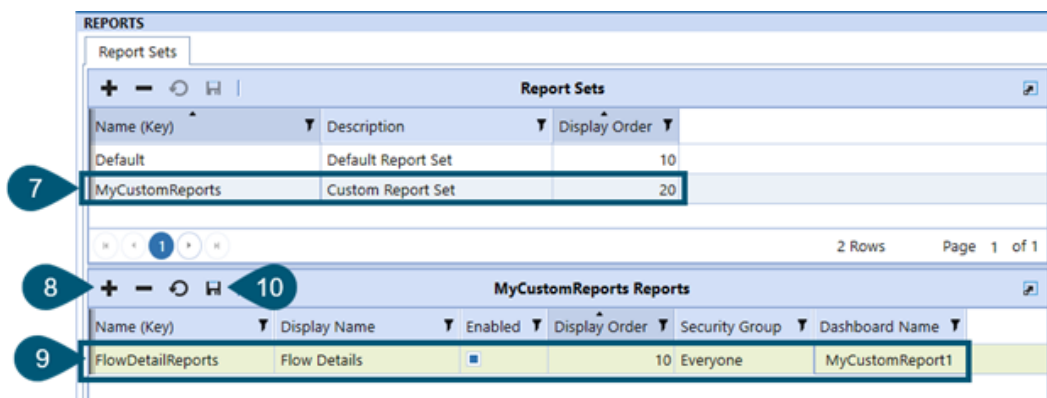
Complete the Configuration

Once your dashboard tests successfully, finish the configuration in Application Control Manager.

1. Return to the Application Control Manager dashboard.
2. Click **Administration**.
3. Click **Reports**.
4. Add a new **Report Set** by clicking **+**.

Administration Tasks

5. Name the **Report Set**, give it a **Description**, and assign a **Sort Order** (this is for display order).
6. Click **Save**.
7. Highlight the **MyCustomReports** row in the Report Sets table.
8. Click **+** in the **MyCustomReports** table.
9. Fill out the information, selecting the dashboard you created from the drop-down in the **Dashboard Name** field.
10. Click the table **Save** button.



11. Navigate to **Reports**.
12. Change the drop-down from Default Report Set to **Custom Report Set**.
13. Select the **Flow Details** report set.
14. View the report.

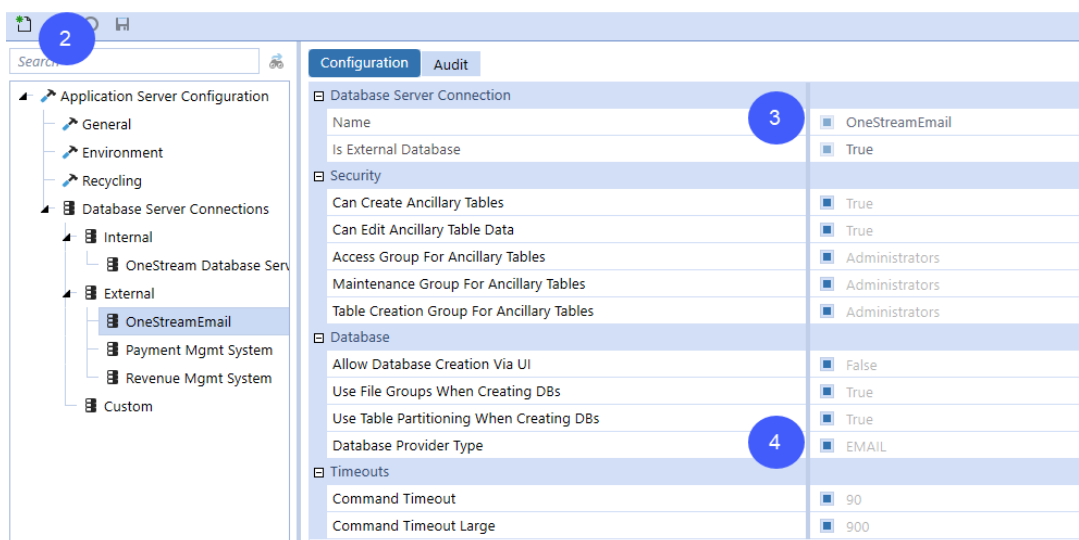
Setup Email Notification

You can set up an email server in the Application Server Configuration Tool and then create the connection in the OneStream Windows Application. The name for the Database Server Connection must match the Server Config Name. If you do not know the name, contact OneStream Support.

OneStream Windows Application

If you are an administrator in OneStream, you can find the name through the following:

1. Navigate to **System > Administration > System Configuration > Database Server Connections**.
2. Click **Create Item** to add a new server.
3. Enter a name for the server.
4. Set the **Database Provider Type** to **EMAIL**.



5. Enter a connection string.
6. Reset the server.

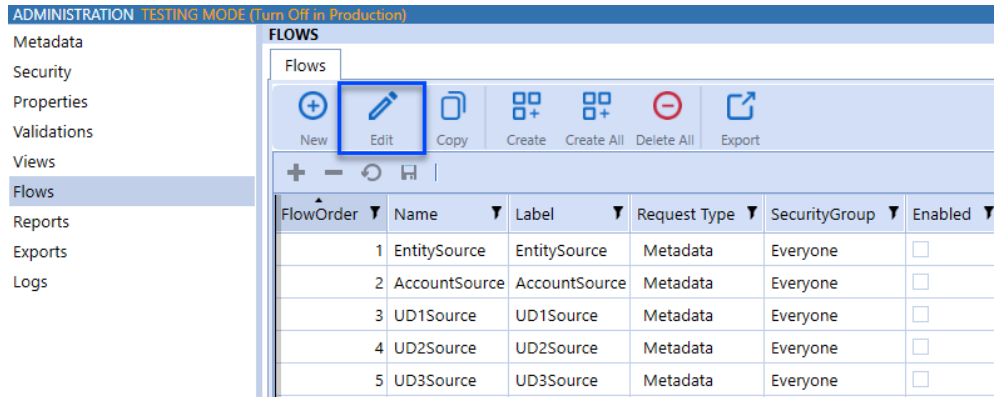
Email Settings in a Flow

You can set an email address in each step of the flow from the Flows tab under Administration.

1. Ensure the email server configuration is updated in **Administration > Global Setup > Email Settings**. (See Email Settings section for more info.)
2. Navigate to **Administration > Flows**.

Administration Tasks

3. Select a flow and click **Edit**.



ADMINISTRATION TESTING MODE (Turn Off in Production)

Metadata
Security
Properties
Validations
Views
Flows
Reports
Exports
Logs

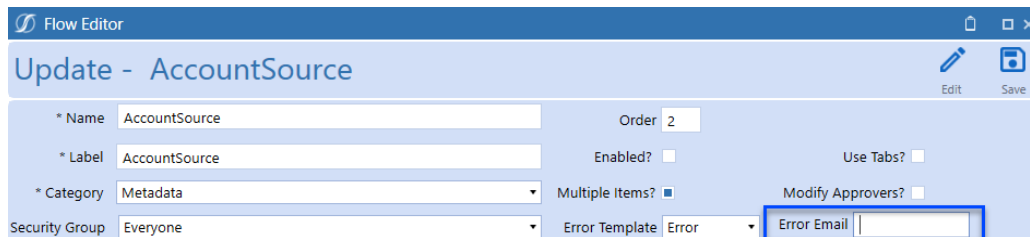
Flows

Flows

New Edit Copy Create Create All Delete All Export

FlowOrder	Name	Label	Request Type	SecurityGroup	Enabled
1	EntitySource	EntitySource	Metadata	Everyone	<input type="checkbox"/>
2	AccountSource	AccountSource	Metadata	Everyone	<input type="checkbox"/>
3	UD1Source	UD1Source	Metadata	Everyone	<input type="checkbox"/>
4	UD2Source	UD2Source	Metadata	Everyone	<input type="checkbox"/>
5	UD3Source	UD3Source	Metadata	Everyone	<input type="checkbox"/>

- 4.
5. Enter an email under **Error Email**.



Flow Editor

Update - AccountSource

Edit Save

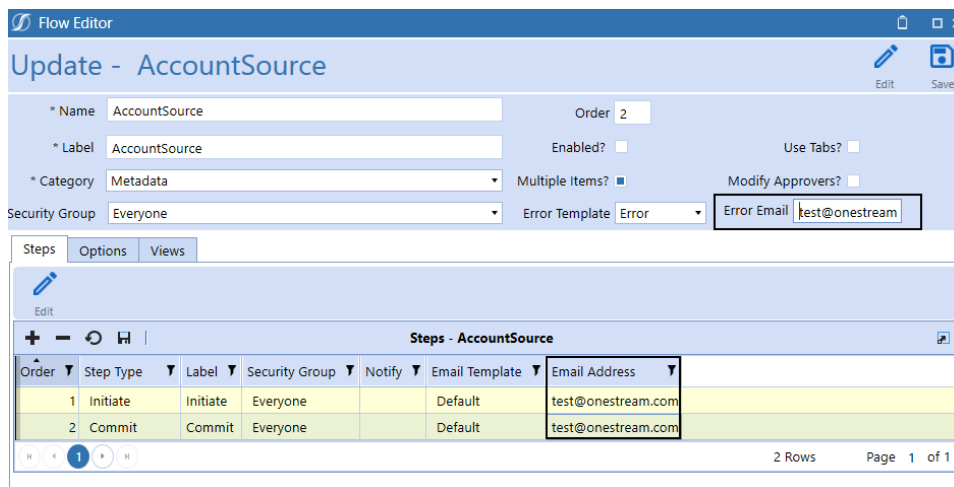
* Name AccountSource Order 2

* Label AccountSource Enabled? Use Tabs?

* Category Metadata Multiple Items? Modify Approvers?

Security Group Everyone Error Template Error Error Email

6. Enter an email address in each step on the Flows.



Flow Editor

Update - AccountSource

Edit Save

* Name AccountSource Order 2

* Label AccountSource Enabled? Use Tabs?

* Category Metadata Multiple Items? Modify Approvers?

Security Group Everyone Error Template Error Error Email test@onestream

Steps Options Views

Steps - AccountSource

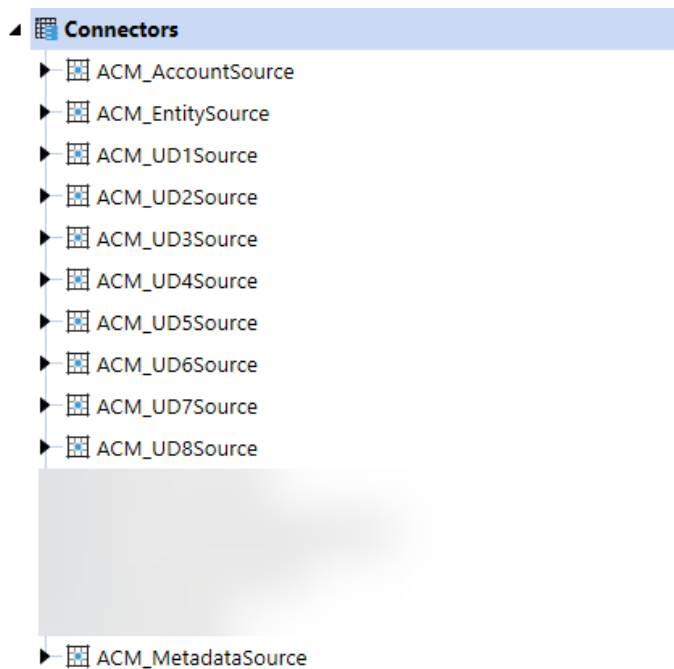
Order	Step Type	Label	Security Group	Notify	Email Template	Email Address
1	Initiate	Initiate	Everyone		Default	test@onestream.com
2	Commit	Commit	Everyone		Default	test@onestream.com

2 Rows Page 1 of 1

Metadata Import

Set Up Data Sources

When Application Control Manager is installed, a default set of data connectors is installed. There is one connector for each supported dimension:

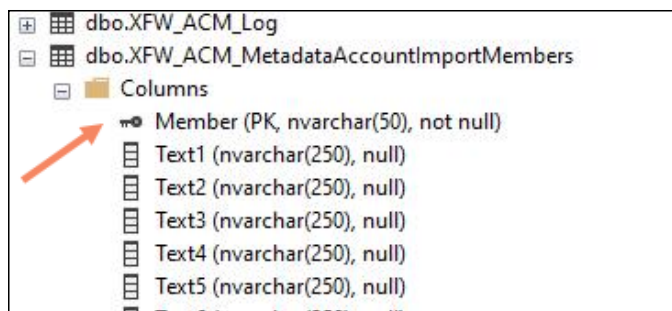


These data sources are set up to connect to Application Control Manager staging tables, which are created during the installation process. These staging tables are named with the following format: ACM_Metadata<dimension>ImportTree and ACM_Metadata<dimension>ImportMembers.

Administration Tasks

- + [table icon] dbo.XFW_ACM_MetadataAccountImportMembers
- + [table icon] dbo.XFW_ACM_MetadataAccountImportTree
- + [table icon] dbo.XFW_ACM_MetadataEntityImportMembers
- + [table icon] dbo.XFW_ACM_MetadataEntityImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD1ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD1ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD2ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD2ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD3ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD3ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD4ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD4ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD5ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD5ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD6ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD6ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD7ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD7ImportTree
- + [table icon] dbo.XFW_ACM_MetadataUD8ImportMembers
- + [table icon] dbo.XFW_ACM_MetadataUD8ImportTree

The tables with Members in the name store the unique list of members from the source metadata system. Each dimension table has a different set of properties, including various properties related to the member, that you can import into OneStream.



The tables with Tree in the name store the Metadata relationship details, parent, and child. Each table contains a different set of properties, including relationship properties, that you can import into OneStream.

Administration Tasks

Columns
Dimension (PK, nvarchar(50), not null)
Parent (PK, nvarchar(50), not null)
Child (PK, nvarchar(50), not null)
SortOrder (int, not null)

The Dimension column must be populated with the Label of the Application Control Manager dimension that you are loading. This is set up in the Administration > Metadata > Dimensions page.

APPLICATION CONTROL MANAGER

ADMINISTRATION TESTING MODE (Turn Off in Production)

GOVERNANCE OPTIONS

Metadata

Security

Properties

Validations

Views

Flows

Reports

Exports

Logs

Dimensions Actions Source System Import

Label	Cube	Dimension	DimName	MemberFilter
Account	CorpCube	Account	TotalAccounts	A#Root.Tree
Entity	CorpCube	Entity	CorpEntities	E#Root.Tree
SubAccount	CorpCube	Account	TotalAccountChild	A#Root.Tree
UD1	CorpCube	UD1	UD1Source	UD1#Root.Tree
UD2	CorpCube	UD2		UD2#Root.Tree
UD3		UD3		UD3#Root.Tree
UD4		UD4		UD4#Root.Tree
UD5		UD5		UD5#Root.Tree
UD6		UD6		UD6#Root.Tree
UD7		UD7		UD7#Root.Tree
UD8		UD8		UD8#Root.Tree

11 Rows Page 1 of 1

The Parent and Child columns are populated with member names found in the Member column of the associated Members table. SortOrder can be used to sort the hierarchy. If order is not important, enter a value of 1 for all rows in the hierarchy table.

To load Metadata details to the tables mentioned above, you can either modify the Data Connector to pull from a specific file, or you can use an Excel template and upload the metadata into Application Control Manager using the Source System Import tab.

Administration Tasks

The screenshot shows the Administration console interface. The 'GOVERNANCE OPTIONS' section is active, with 'Source System Import' highlighted. Below this, a table lists 'Data Management Steps' with columns for 'Group Name' and 'Name'. To the right, a table titled 'XFW_ACM_MetadataAccountImportMembers' displays a hierarchy of dimensions and their members.

Group Name	Name
Application Control Manager Metadata Import (ACM)	Commit_ACM
Application Control Manager Metadata Import (ACM)	Load Accounts_ACM
Application Control Manager Metadata Import (ACM)	Load Entities_ACM
Application Control Manager Metadata Import (ACM)	Load UD1_ACM
Application Control Manager Metadata Import (ACM)	Load UD2_ACM
Application Control Manager Metadata Import (ACM)	Load UD3_ACM
Application Control Manager Metadata Import (ACM)	Load UD4_ACM
Application Control Manager Metadata Import (ACM)	Load UD5_ACM
Application Control Manager Metadata Import (ACM)	Load UD6_ACM
Application Control Manager Metadata Import (ACM)	Load UD7_ACM
Application Control Manager Metadata Import (ACM)	Load UD8_ACM

Dimension	Parent	Child	AggregationWeight	SortOrd
Account	Root	ACCTTotal_Revenues	1	
Account	Root	ACCTTotal_Expenses	1	
Account	Root	ACCTStatistics	1	
Account	Root	ACCTPlugAccount	1	
Account	ACCTTotal_Revenues	ACCTSales	1	
Account	ACCTTotal_Expenses	ACCTRent	1	
Account	ACCTStatistics	ACCTHeadcount	1	
Account	ACCTPlugAccount	ACCT20300	1	

Workflow Profiles

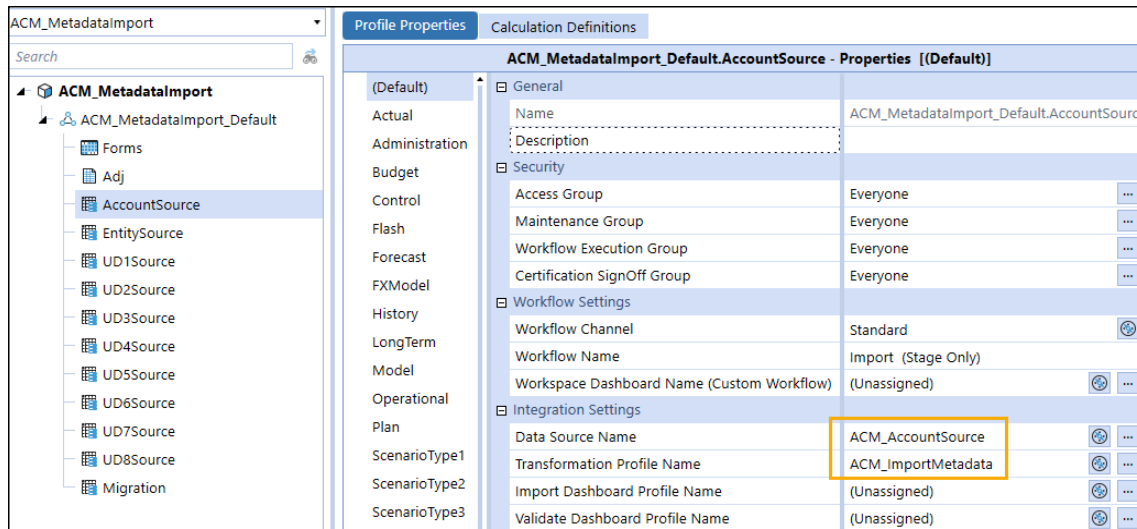
When Application Control Manager is installed, a Workflow Profile named ACM_MetadataImport_Default is automatically created in your system. In addition, a unique cube is created: ACM_MetadataImport.

The screenshot shows the configuration for the 'ACM_MetadataImport' workflow profile. The profile is expanded to show a list of dimensions and their sources.

- ACM_MetadataImport_Default
 - Forms
 - Adj
 - AccountSource
 - EntitySource
 - UD1Source
 - UD2Source
 - UD3Source
 - UD4Source
 - UD5Source
 - UD6Source
 - UD7Source
 - UD8Source
 - Migration

By default, the data source name for each dimension is set to use default data connectors configured during installation.

Administration Tasks



Select the transformation profile named ACM_ImportMetadata. This is automatically created in your environment when Application Control Manager is installed.

The Workflow Profiles are used to import the metadata loaded in the Application Control Manager staging tables into the OneStream staging tables. After the information is loaded, the metadata is analyzed to determine differences that exist between the source data and the metadata stored in OneStream. The system looks for differences in this order:

1. Missing members in the metadata compared to the source system.
2. Existing members that need to be moved or copied to a different hierarchy.
3. Updates to existing member properties.

If Application Control Manager finds any updates, it generates a request in the application. The results of this process are displayed on the main home page of Application Control Manager.

Global POV Time

When running a source system import, the system loads the data in the current year and month staging tables, and the Global Time is set to a full year.

If Enforce Global POV is set to TRUE, the load process uses the value set in the Global POV. If the Global POV is set to a date format other than YYYYMM, an error occurs because the OneStream Software workflow profile will not load properly.

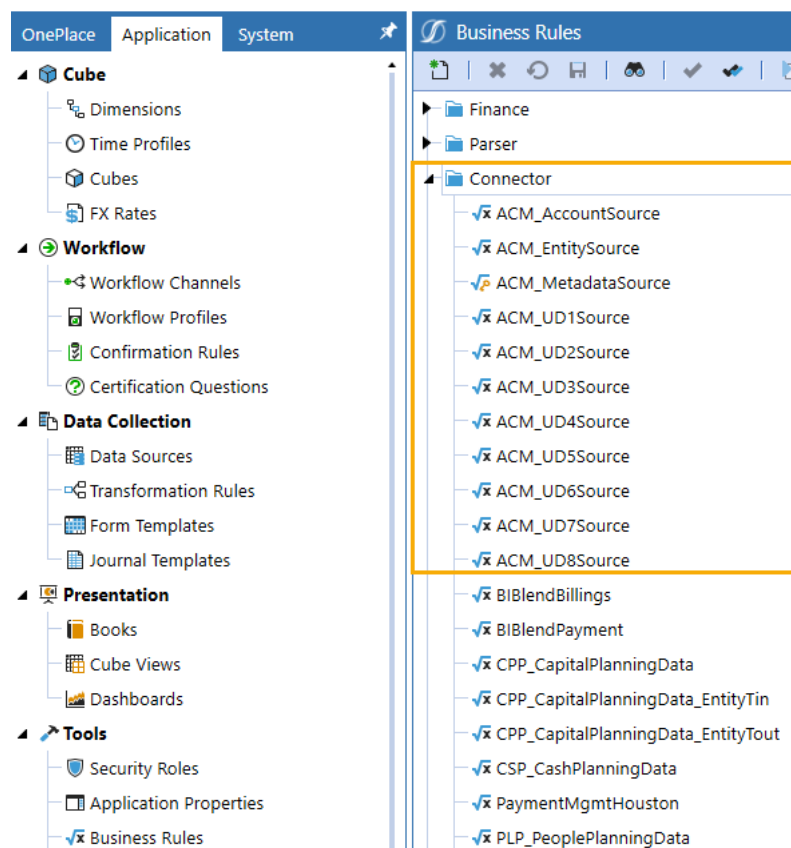
Administration Tasks

If Enforce Global POV is set to FALSE, the data management source system import process ignores any Global POV settings and instead uses the system date and time to determine the period for loading data.

Metadata Import Fields

To map the import data to the metadata properties in OneStream, go to the Application Control Manager Administration screen and select Views. A single view for each workflow profile is created when Application Control Manager is installed and these views contain every property related to the dimension. To customize these views, create a new view and use the Copy Properties button to copy the properties that you can then modify accordingly.

If you click on Edit on the default Views, on the right side of the View Editor, you can see the list of metadata properties that map in the same order as the default Data Connectors.



These properties also match the information in the database tables:

Administration Tasks

Member Properties for Account	
	<ul style="list-style-type: none">• "Member"• "Description"• "Text1"• "Text2"• "Text3"• "Text4"• "Text5"• "Text6"• "Text7"• "Text8"• "UD1Constraint"• "UD2Constraint"• "UD3Constraint"• "UD4Constraint"• "UD5Constraint"• "UD6Constraint"• "UD7Constraint"• "UD8Constraint"• "EnableUD1Aggregation"• "EnableUD2Aggregation"

	<ul style="list-style-type: none">• "EnableUD3Aggregation"• "EnableUD4Aggregation"• "EnableUD5Aggregation"• "EnableUD6Aggregation"• "EnableUD7Aggregation"• "EnableUD8Aggregation"• "EnableICAggregation"• "EnableOriginAggregation"• "EnableFlowAggregation"• "UsedOnEntityDim"• "UsedOnConsDim"• "IsConsolidated"• "FlowConstraint"• "ICConstraint"• "ICMemberFilter"• "AllowInput"• "WorkflowChannel"• "InUse"• "DisplayMemberGroup"• "FormulaType"• "Formula"• "FormulaForCalculationDrillDown"
--	--

Administration Tasks

	<ul style="list-style-type: none">• "AdjustmentType"• "InputViewForAdj"• "NoDataZeroViewForAdj"• "NoDataZeroViewForNonAdj"• "AccountType"• "IsICAaccount"• "UseAltInputCurrencyInFlow"• "PlugAccount"• "AggregationWeight"• "CubeType"• "ScenarioType"• "TimeVal"
Member Properties for Entity	
	<ul style="list-style-type: none">• "Member"• "Description"• "Text1"• "Text2"• "Text3"• "Text4"• "Text5"

	<ul style="list-style-type: none">• "Text6"• "Text7"• "Text8"• "UD1Constraint"• "UD2Constraint"• "UD3Constraint"• "UD4Constraint"• "UD5Constraint"• "UD6Constraint"• "UD7Constraint"• "UD8Constraint"• "UD1Default"• "UD2Default"• "UD3Default"• "UD4Default"• "UD5Default"• "UD6Default"• "UD7Default"• "UD8Default"• "Currency"• "IsConsolidated"• "IsIC"
--	--

	<ul style="list-style-type: none">• "FlowConstraint"• "ICConstraint"• "AllowAdjustments"• "ICMemberFilter"• "InUse"• "AllowAdjustmentsFromChildren"• "DisplayMemberGroup"• "ReadDataGroup"• "ReadDataGroup2"• "ReadWriteDataGroup"• "ReadWriteDataGroup2"• "UseCubeDataAccessSecurity"• "CubeDataCellAccessCategories"• "CubeConditionalInputCategories"• "CubeDataManagementAccessCategories"• "SiblingConsolidationPass"• "SiblingRepeatCalcPass"• "AutoTranslationCurrencies"• "DisplayMemberGroup"• "ParentSortOrder"• "CubeType"• "ScenarioType"
--	--

Administration Tasks

	<ul style="list-style-type: none">• "TimeVal"
Member Properties for UD1	
	<ul style="list-style-type: none">• "Parent"• "Member"• "Description"• "Text1"• "Text2"• "Text3"• "Text4"• "Text5"• "Text6"• "Text7"• "Text8"• "UD2Constraint"• "UD3Constraint"• "UD4Constraint"• "UD5Constraint"• "UD6Constraint"• "UD7Constraint"• "UD8Constraint"• "UD2Default"

	<ul style="list-style-type: none">• "UD3Default"• "UD4Default"• "UD5Default"• "UD6Default"• "UD7Default"• "UD8Default"• "IsConsolidated"• "AllowInput"• "WorkflowChannel"• "InUse"• "AlternateCurrencyForDisplay"• "DisplayMemberGroup"• "FormulaType"• "IsAttributeMember"• "AttributeMemberSourceMember"• "AttributeMemberExpressionType"• "AttributeMemberRelatedDimType1"• "AttributeMemberPropType1"• "AttributeMemberComparisonText1"• "AttributeMemberOperatorType1"• "AttributeMemberRelatedDimType2"• "AttributeMemberPropType2"
--	--

Administration Tasks

	<ul style="list-style-type: none">• "AttributeMemberComparisonText2"• "AttributeMemberOperatorType2"• "Formula"• "FormulaForCalculationDrillDown"• "AggregationWeight"• "CubeType"• "ScenarioType"• "TimeVal"
Member Properties for UD2-8 fields	
	<ul style="list-style-type: none">• "Parent"• "Member"• "Description"• "Text1"• "Text2"• "Text3"• "Text4"• "Text5"• "Text6"• "Text7"• "Text8"• "IsConsolidated"

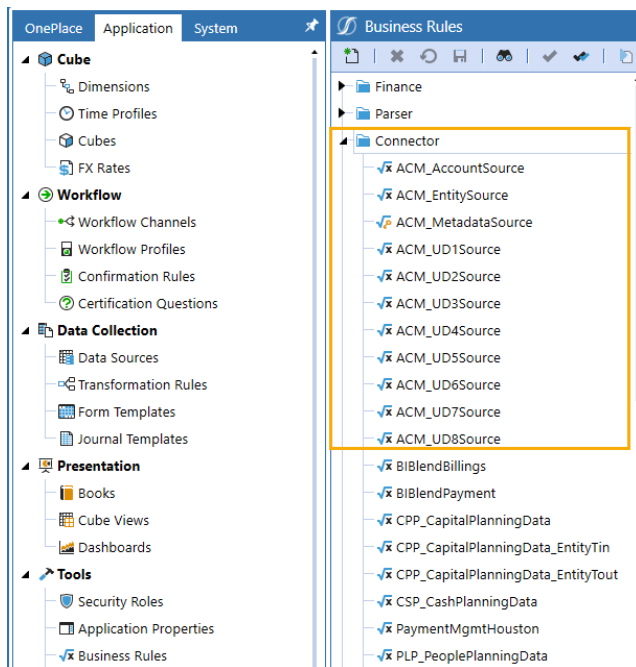
	<ul style="list-style-type: none">• "AllowInput"• "WorkflowChannel"• "InUse"• "AlternateCurrencyForDisplay"• "DisplayMemberGroup"• "FormulaType"• "IsAttributeMember"• "AttributeMemberSourceMember"• "AttributeMemberExpressionType"• "AttributeMemberRelatedDimType1"• "AttributeMemberPropType1"• "AttributeMemberComparisonText1"• "AttributeMemberOperatorType1"• "AttributeMemberRelatedDimType2"• "AttributeMemberPropType2"• "AttributeMemberComparisonText2"• "AttributeMemberOperatorType2"• "Formula"• "FormulaForCalculationDrillDown"• "AggregationWeight"• "CubeType"• "ScenarioType"
--	--

Administration Tasks

	<ul style="list-style-type: none">• "TimeVal"
--	---

NOTE: If you want to change the list of properties monitored and updated in OneStream, you can create a new View and then use the Copy Properties button to copy the properties from the default view. Then, you can remove the property or change the order of the property. To change the order of the property, use the arrow buttons to move fields in and out of the list.

NOTE: If you are using a customized view, you must modify the related Connector Business Rule.

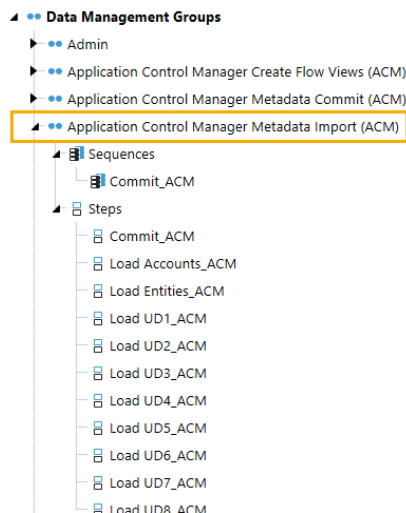


In the Connector business rules, find the GetFieldList method and associated method containing the SQL to pull information from the database in GetSourceDataSQL.

NOTE: Make sure the fields match the order that Application Control Manager has in the associated view.

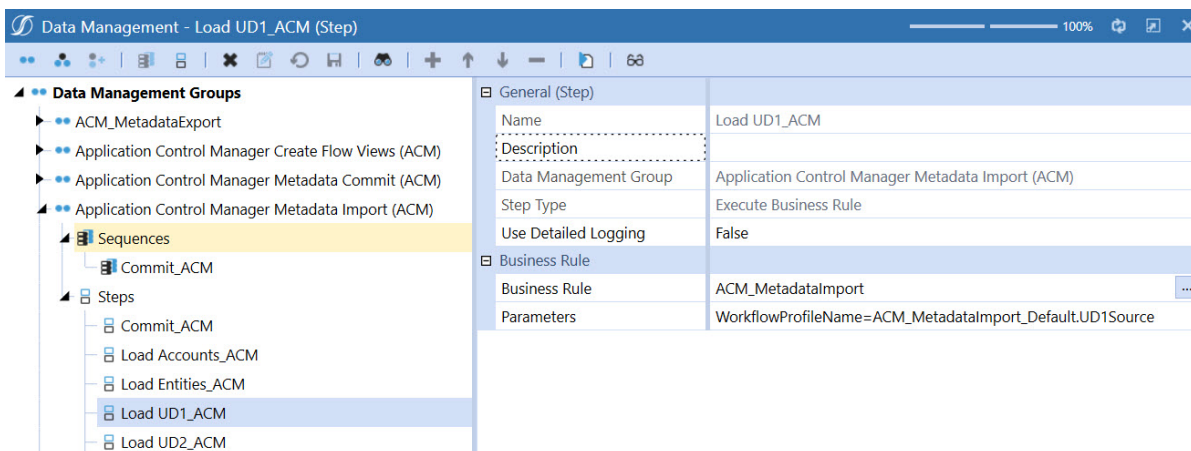
Data Management Groups

The process of loading and committing metadata updates to OneStream is handled using Data Management steps and sequences.



The data management steps are preconfigured when Application Control Manager is installed. The Load items are set up to execute the workflow profile associated with the dimension name. The process loads the data from the database into the Application Control Manager staging tables, performs the comparison process, and builds a request if necessary.

The associated Workflow Profile is in the Parameters on the data management step:



Administration Tasks

- **WorkflowProfileName:** Specify the name of the dimension you are importing for. This matches the Workflow Profile as well as the WF Profile Name in the Metadata Import Fields screen.

Ensure the Business Rule is set to ACM_MetadataImport.

The execution of the steps Load <...> perform the following steps:

1. Loads the data from the database or file into the workflow for the current global POV time and scenario.
2. Compares the data loaded into staging to the existing OneStream members for the selected dimension and determines which members need to be added.
3. Compares the data loaded into staging to the existing OneStream hierarchy for the selected dimension and determines which updates are required to the overall hierarchy.
4. Compares the data loaded into staging to the existing OneStream members and determines which properties need to be modified.
5. Compares the existing members and hierarchy in OneStream to the data loaded into the staging to determine which members need to be removed from the hierarchy. Any member not in the import file/table is marked as orphaned in OneStream. The member is not deleted.
6. Generates an Application Control Manager request that performs all the required operations in a single transaction.

After a request has been generated, the Commit All Metadata Updates data management step runs to commit the updates to the system.

The Data Management Steps can be combined into a sequence to enable the full automation of the process using a PowerShell script and the Windows Task Scheduler on the OneStream application server. You can automate the load and commit steps to include no user interaction before commit or you can set the system up to require an individual on the Finance team to review the request before manually committing it into the system.

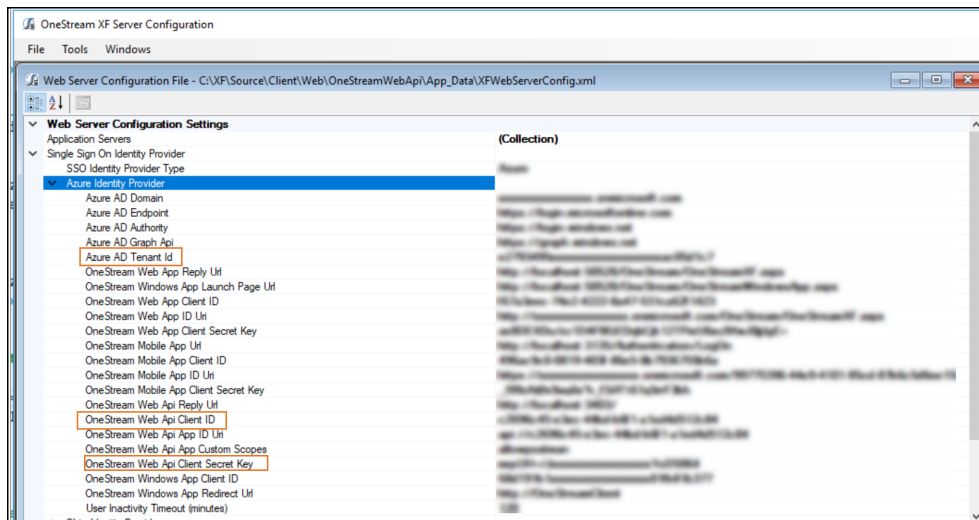
Metadata Synchronization

Initial Setup and Configuration

The metadata migration and synchronization feature of Application Control Manager keeps the metadata hierarchies between two OneStream installations/applications aligned with one another. This is accomplished by using the REST API built into OneStream. The configuration is completed in the destination environment. The REST API in the source environment requires setup on the server side to ensure that the correct configuration is in place and to request the following details for your Azure Single Sign-on configuration from your technical support representative:

- Azure AD Tenant ID
- OneStream Web API Client ID
- OneStreamWeb API Client Secret Key
- Source OneStream System URL
- Source OneStream System Application Name

The first three values can be found in the OneStream WebServerconfig.xml:



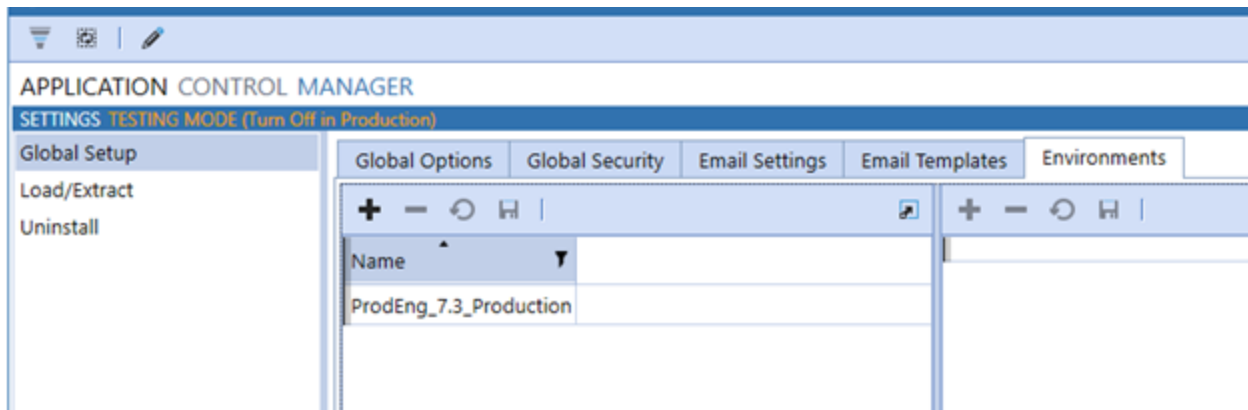
Set Up Remote Source Server Environment

First, you must set up a Remote Source Server Environment to start Migration.

1. Navigate to **Settings > Global Setup > Environments**.
2. Click **+** in **Name Table Editor**.
3. Create and enter an **Environment Name** under the **Name** field.

TIP: Remember the **Environment Name**. This will be used in future steps.

4. Save the **Environment Name**.



Create Environment Options

Next, you must create the Environment that surrounds the source system.

1. Click **+** in **Options / Value Table Editor**.
2. Click the Option column to display the list for the **Environment Options**.

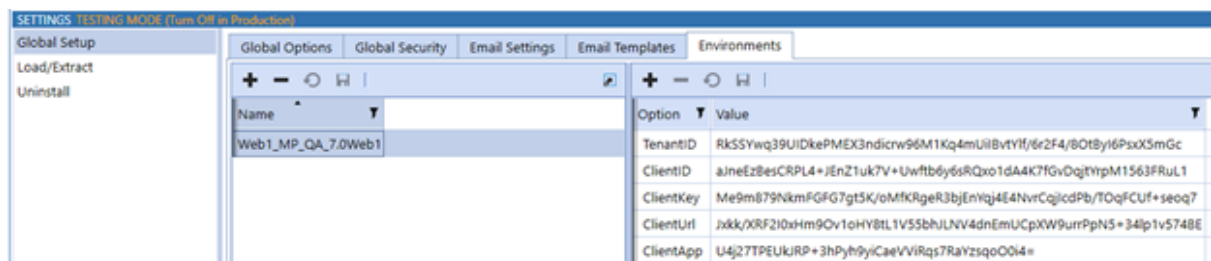
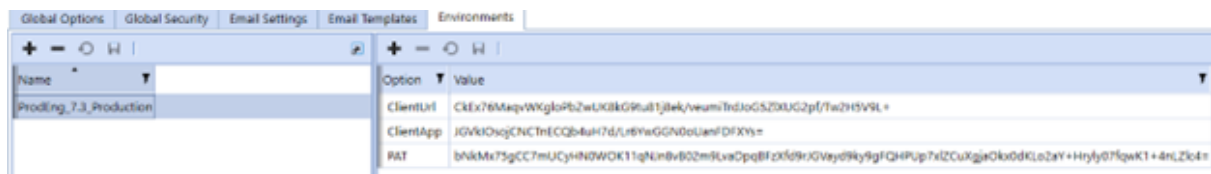
NOTE: If the remote server is a OneStream IdentityServer (OIS) with a personal access token (PAT), only the ClientUrl, ClientApp, and PAT options are necessary.

NOTE: If the remote server is a Legacy Azure SSO Environment, TenantID, ClientID, ClientKey, ClientUrl, and ClientApp options are necessary. PAT is not needed.

Administration Tasks

TenantID, ClientID, ClientKey, and ClientUrl can all be found in the Server XFConfig file under the following keys:

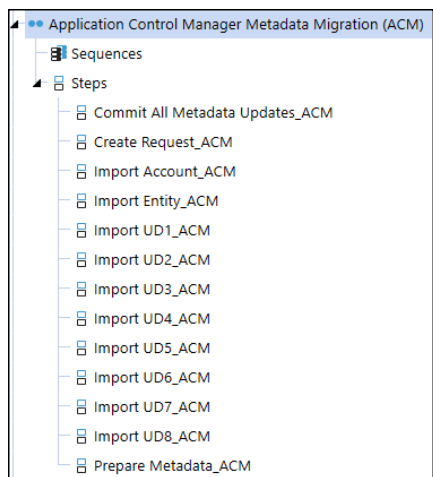
- TenantID = AzureADTenantId
- ClientID = AzureADClientId
- ClientKey = AzureADWebApiSecretKey
- ClientUrl = XFWebApiUrl (only the URL's protocol and domain are needed)
- ClientApp is the remote server's application that is being used for the Migration.



Data Management Job Configuration

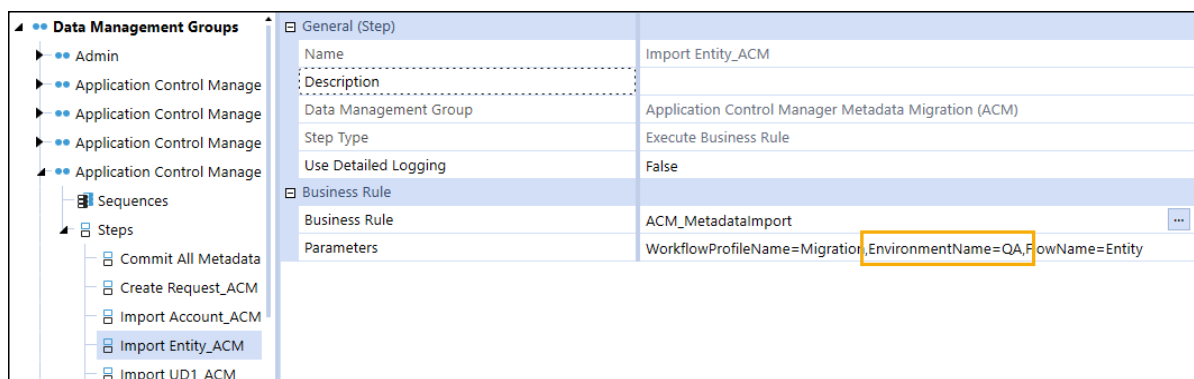
The metadata synchronization process is run using a Data Management job in OneStream. When Application Control Manager is installed, a Data Management Group named Application Control Manager Metadata Migration (ACM) group containing associated steps is automatically created:

Administration Tasks



As with other features in Application Control Manager, there is a step associated with each of the dimensions in OneStream.

To complete the setup, you must update the Parameters section of the step. The EnvironmentName parameter is entered in the initial setup step from Application Control Manager:



The WorkflowProfileName is always Migration and the FlowName is the flow name you created previously. These two values should not be changed.

Execution

When any of the Load <dimension name> steps are executed, the following processes occurs:

Administration Tasks

- Prepare metadata on remote (source system)
 - Using the REST API that was configured in the Application Control Manager system administration screen, the system remotely executes a Data Management setup on the source system named Application Control Manager Metadata Migration (ACM) -> Prepare Metadata.
 - This process gathers all metadata information including the member list, hierarchy, and properties for the dimension specified in the workflow profile. This information is stored in a temporary staging table in the database.
- Retrieve metadata from a remote system
 - Using the REST API, make a built-in API call named `GetAdoDataSetForSqlCommand` on the remote system. The system pulls the information and loads it into the local (destination) OneStream application database for further processing.
- After the data is loaded into the database, the same processing that occurs during a metadata import takes place. If any updates are required, the system automatically generates a request, which can be committed using the Application Control Manager Metadata Migration (ACM) -> Commit All Metadata Updates Data Management step.

Configure Flows With Migration Step

Application Control Manager can migrate requests from one OneStream environment to another. You can use this as a testing feature to see how metadata updates will impact a production system before committing them in that environment. You can also use it to keep two systems synchronized with each other.

Before continuing, follow the setup steps outlined in the [Metadata Synchronization](#) section. You must set up a destination environment where requests will be sent.

If you have a large data set to migrate (>100k of data), make sure to increase your Command Timeout or Task Inactivity Timeout (minutes) settings under Database Server Connections > Connection String Settings > Command Timeout or Application Server Configuration Settings > Task Inactivity Timeout (minutes).

Add a new step to any flow you have configured in the system. In the Application Control Manager administration screen, select Flows and edit or create a flow to use for the migration. Add a new step to the flow after the Initiate step and select **Migrate**.

Administration Tasks

Flow Editor
Update - EntitySource

* Name: EntitySource Order: 1
* Label: EntitySource Enabled? Use Tabs?
Category: Metadata Multiple Items? Modify Approvers?
Security Group: Everyone Error Template: Error Error Email:

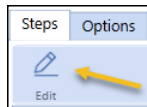
Steps Options Views

Steps - EntitySource

Order	Step Type	Label	Security Group	Notify	Email Template	Email Address
1	Initiate	Initiate_EntitySource	Everyone		Default	
2	Migrate	Migrate	Everyone		Default	
3	Commit	Commit_EntitySource	Everyone		Default	

3 Rows Page 1 of 1

Click **Edit**:



Specify the destination system to commit the request. This was defined in the prior configuration step.

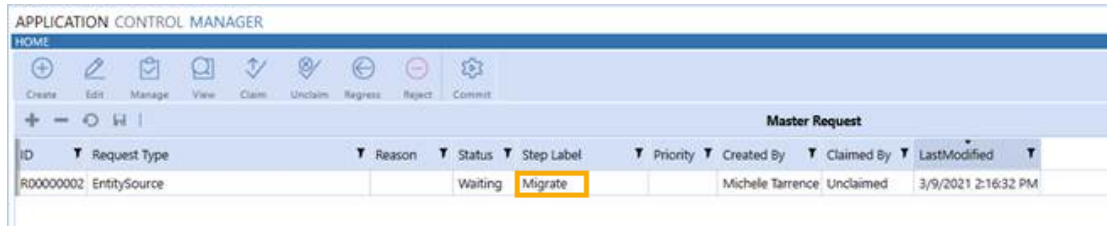
Select the target environment:

Flow Step Editor
Update - Migrate

Label: Migrate Order: 2
Step Type: Migrate Security Group: Everyone
Email Template: Default Email Address:
Notify: None Target Environment: Azure (QA)

When you create a new request in the system and advance from the initiate step, you will see the system report the next step to be Migrate:

Administration Tasks




The screenshot shows the 'APPLICATION CONTROL MANAGER' interface. At the top, there is a 'HOME' header and a navigation bar with icons for 'Create', 'Edit', 'Manage', 'View', 'Claim', 'Unclaim', 'Regress', 'Reject', and 'Commit'. Below this is a 'Master Request' table. The table has columns for 'ID', 'Request Type', 'Reason', 'Status', 'Step Label', 'Priority', 'Created By', 'Claimed By', and 'LastModified'. A single row is visible with the following data: ID: R00000002, Request Type: EntitySource, Reason: (empty), Status: Waiting, Step Label: Migrate (highlighted with a yellow box), Priority: (empty), Created By: Michele Tarrence, Claimed By: Unclaimed, LastModified: 3/9/2021 2:16:32 PM.

ID	Request Type	Reason	Status	Step Label	Priority	Created By	Claimed By	LastModified
R00000002	EntitySource		Waiting	Migrate		Michele Tarrence	Unclaimed	3/9/2021 2:16:32 PM

When you manage this request and advance to the next step, the system automatically connects to the target environment REST API and pushes the request information from the source system to the destination environment and automatically commits the request. After reviewing and testing in that environment, return to the source system and continue processing as you typically would.

Help & 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 & 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: ACM_PV7.1.0_SV101_PackageContents.zip

Identifier	Description
ACM	Solution ID
PV7.1.0	Minimum Platform version required to run solution
SV101	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*.

1. In the production OneStream application, install the solution and create the data tables. See "Setup and Installation" on page 2 for Database Server Connection settings and installation details.
2. Data tables are created in the OneStream Development application during the solution installation. Using the [Microsoft Data Migration Assistant](#), copy the data from the tables to the Production Microsoft SQL Server Database. Only the Microsoft SQL Administrator should run the migration assistant.

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 the 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.