



Actor Workspace Setup Instructions

PV410 SV100

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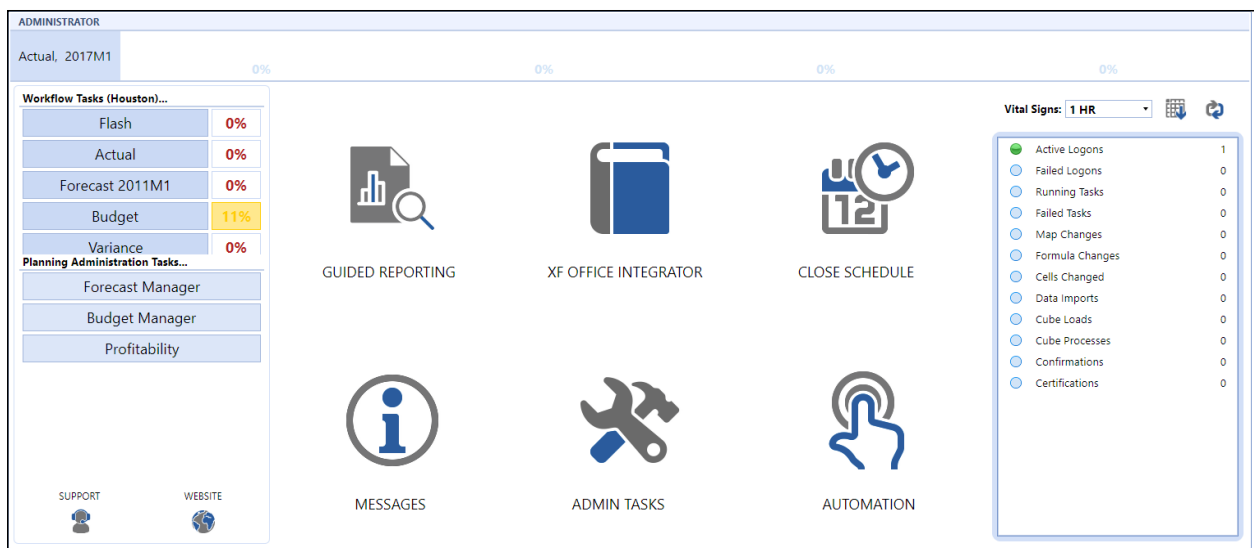
Actor Workspace Overview

Actor Workspace is a collection of predefined dashboards that deliver custom content for different user types including executives, controllers and administrators.

Actor Workspace Components

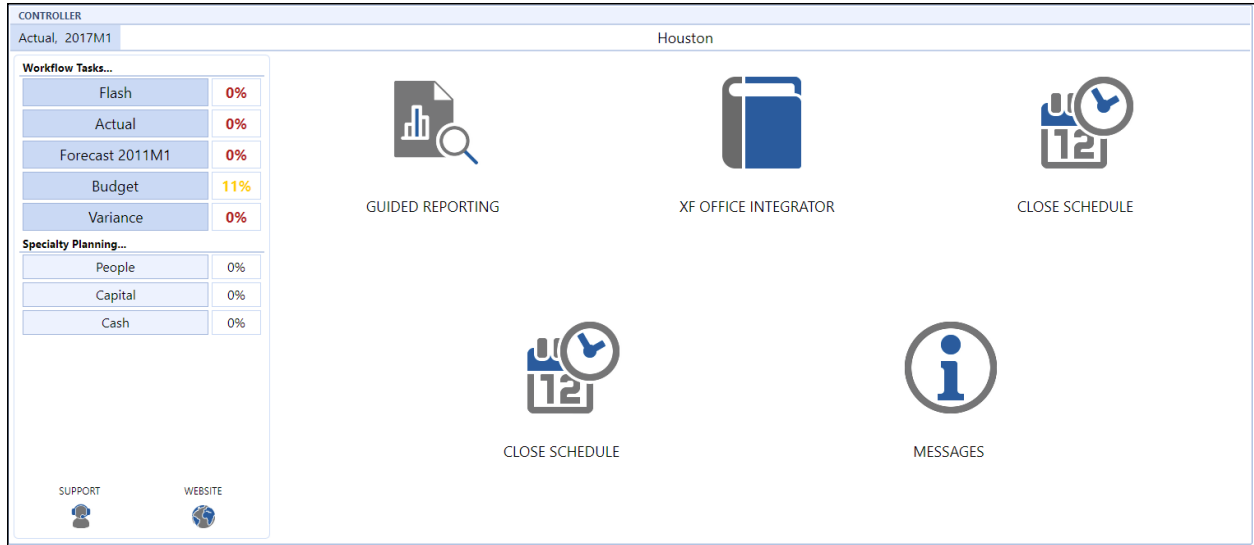
Actor Workspace contains three main home screens: Administrator, Controller and Executive. Each home screen contains different content given specific roles, duties and activities.

Administrator Workspace



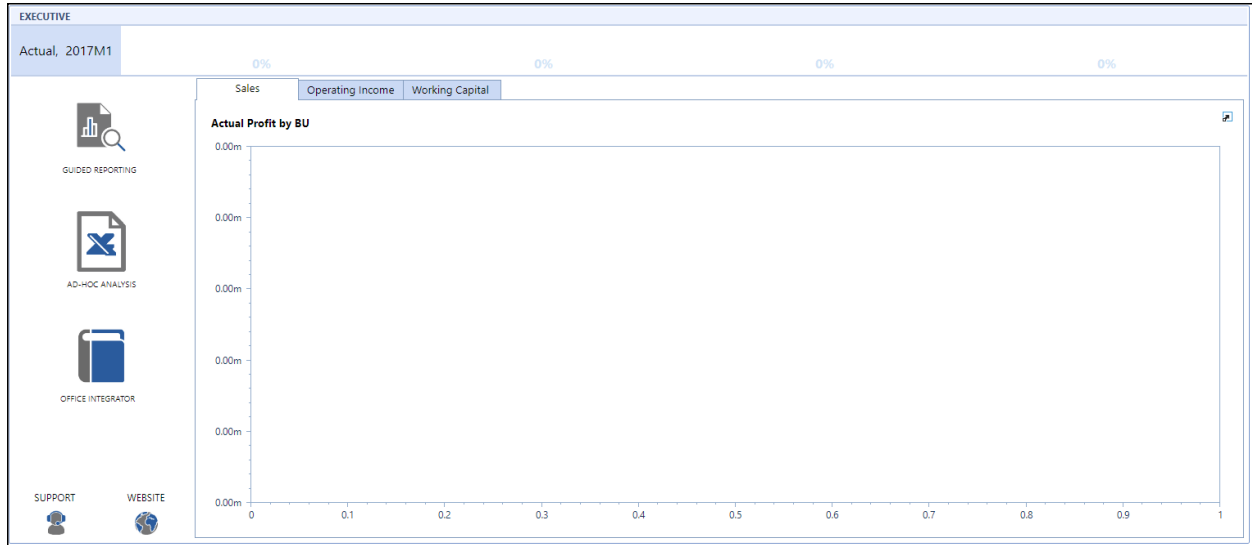
The Administrator Workspace displays workflow and calculation status for multiple business units, vital sign details for the current application, enables launching to the users default workflow profile for multiple scenarios, and it allows the administrator to launch tools such as Guided Reporting, Close Schedule and Automation.

Controller Workspace



The Controller Workspace displays an icon which launches the close schedule for the current period, the default workflow status for multiple scenarios, and the current system notes. This workspace also allows the controller to launch analysis tools such as Guided Reporting and Excel templates.

Executive Workspace



The Executive Workspace displays the default workflow status for four different scenarios and customizable flash charts. This Workspace allows an executive to launch analysis tools such as Guided Reporting and Excel templates.

Set up Actor Workspace

Perform the following tasks to set up Actor Workspace:

- [Import the Actor Workspace Package](#)
- [Specify Actor Workspace Settings](#)
- [Set Up Automation Tasks](#)
- [Set Up Cube Views Used in Actor Workspace](#)

Import Actor Workspace Package

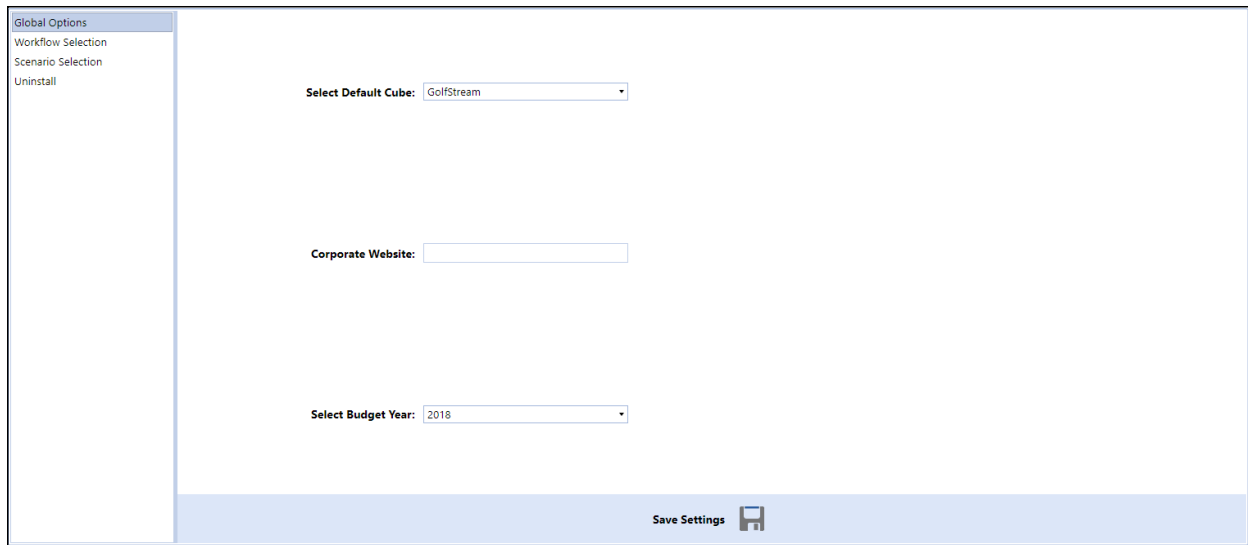
The Actor Workspace package is a .zip file containing the Actor Workspace application files and is located in the OneStream MarketPlace. To add Actor Workspace, log on, open the Application Load/Extract screen, and import the .zip file.

NOTE: The Actor Workspace Solution integrates content from Close Manager, Help Desk, and Guided Reporting which are also available in the OneStream MarketPlace. Install these solutions first to ensure Actor Workspace operates correctly.

Specify Actor Workspace Settings

Parameter settings for the XFW Actor Workspace are set on the Actor Workspace Settings page. These settings drive the content for calculation and workflow status. Launch the Settings from the OnePlace dashboard link.

Set up Actor Workspace



The screenshot displays the 'Global Options' configuration page. On the left, a vertical navigation menu lists 'Global Options' (highlighted), 'Workflow Selection', 'Scenario Selection', and 'Uninstall'. The main content area contains three settings: 'Select Default Cube' with a dropdown menu showing 'Golfstream', 'Corporate Website' with an empty text input field, and 'Select Budget Year' with a dropdown menu showing '2018'. At the bottom right, there is a 'Save Settings' button with a floppy disk icon.

Global Options

Global Options include general settings for running the Actor Workspace.

Cube Name

Enter the default cube name.

Corporate Website

Enter the web address for the company's corporate website (if applicable).

Budget Year

Enter the current Budget Scenario reporting year.

Workflow Selection

Workflows that drive calculation status displayed on the Executive and Administration home pages.

Set up Actor Workspace

Global Options
Workflow Selection
Scenario Selection
Uninstall

Select Workflow 1 for Calc Status:

Enter Entity / Desc Associated with Workflow 1:

Select Workflow 2 for Calc Status:

Enter Entity / Desc Associated with Workflow 2:

Select Workflow 3 for Calc Status:

Enter Entity / Desc Associated with Workflow 3:

Select Workflow 4 for Calc Status:

Enter Entity / Desc Associated with Workflow 4:

Save Workflows

Workflow 1

Enter the first workflow to display.

Workflow 1 Entity

Enter the entity name / description associated with workflow 1.

Workflow 2

Enter the second workflow to display

Workflow 2 Entity

Enter the Entity name /description associated with workflow 2.

Workflow 3

Enter the third workflow to display

Workflow 3 Entity

Enter the entity name / description associated with workflow 3

Workflow 4

Enter the fourth workflow to display.

Workflow 4 Entity

Enter the entity name / description associated with workflow 4.

Scenario Selection

Scenarios that drive workflow tasks on the Administrator and Controller home pages are described below.

Set up Actor Workspace

The screenshot displays a software interface for setting up an Actor Workspace. On the left, a vertical navigation menu contains the following items: 'Global Options', 'Workflow Selection', 'Scenario Selection' (which is highlighted), and 'Uninstall'. The main area of the interface contains eight dropdown menus, each with a label and a selected value:

- Select Actual Scenario: Actual
- Select Budget Scenario: Budget
- Select Variance Scenario: Variance
- Select Forecast Scenario: Forecast 2011M1
- Select Flash Scenario: Flash
- Select Capital Plan Scenario: Actual
- Select Cash Plan Scenario: Actual
- Select People Plan Scenario: Actual

At the bottom right of the main area, there is a 'Save Scenarios' button with a floppy disk icon.

Actual Scenario

Enter the name of the Actual scenario.

Budget Scenario

Enter the name of the Budget scenario (if applicable).

Variance Scenario

Enter the name of the Variance scenario (if applicable).

Forecast Scenario

Enter the name of the Forecast scenario (if applicable).

Flash Scenario

Enter the name of the Flash scenario (if applicable).

Capital Plan Scenario

Enter the name of the Capital Plan scenario (if applicable).

Cash Plan Scenario

Enter the name of the Cash Plan scenario (if applicable).

People Plan Scenario

Enter the name of the People Plan scenario (if applicable).

Set User's Default Workflow

Setting the default workflow for a user allows the Actor Workspaces to open a specified workflow. To setup a default workflow for a user, navigate to the user under Security and enter the name of the workflow in **Text 4**. This value needs to be entered for users with the Controller and Administrator View dashboards.

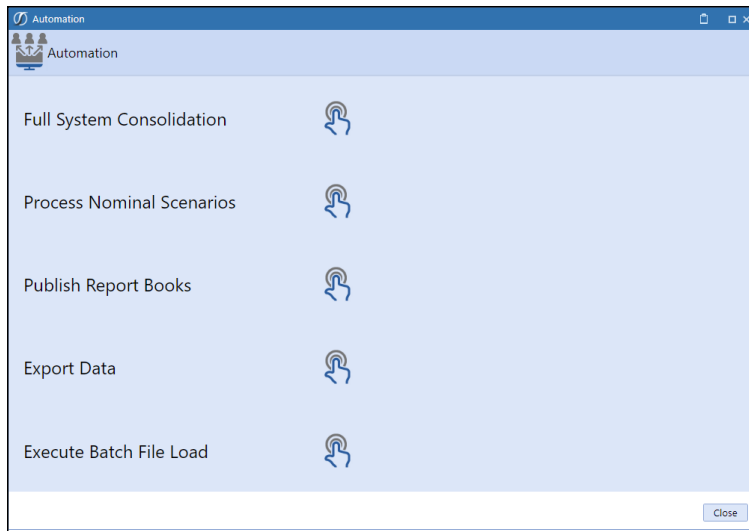
The screenshot shows a user configuration interface. On the left, a tree view shows 'System Security Roles' > 'Users' > 'Administrator'. The main area displays configuration details for the 'Administrator' user, organized into sections: General, Authentication, Preferences, and Custom Text. The 'Text 4' field in the Custom Text section is highlighted with an orange border and contains the value 'Houston'.

General	
Name	Administrator
Description	
Is Enabled	True
Authentication	
External Authentication Provider	(Not Used)
External Provider User Name	
Internal Provider Password
Preferences	
Email	
Culture	English (United States)
Grid Rows Per Page	50
Custom Text	
Text 1	
Text 2	
Text 3	
Text 4	Houston

Set up Automation Tasks

The Automation button on the Administrator View Actor Workspace launches an automation interface you can use to run Data Management Sequences from Actor Workspace dashboards. However, Data Management Sequences are not automatically installed, so create them in on Data Management page, then assigned them to the automation buttons on this dashboard.

Set up Actor Workspace



To set these links, update these parameter components:

- btn_FullConsolidation_AWSe1
- btn_NominalizeScenarios_AWSe1
- btn_PublishReports_AWSe1
- btn_ExportData_AWSe1
- btn_ExecuteBatchLoad_AWSe1

Update the **Selection Changed Server Task Arguments** with the name of the Data Management Sequence launched by each button.

Set up Actor Workspace

Component Properties	
[-] General (Component)	
Name	btn_FullConsolidation_AWS
Description	
Maintenance Unit	XFT Actor Workspaces (AWS)
Component Type	Image Button
[-] Formatting	
Text	
Tool Tip	Full System Consolidation
Display Format	BackgroundColor = Transparent, BorderThickness =
[-] Image Button	
File Source Type	Dashboard File
Url Or Full File Name	NavAutomationTask_AWS.png
[-] Action	
Bound Parameter	
Parameter Value For Button Click	
Apply Selected Value To Current Dashboard	True
POV Action	
Selection Changed POV Action	No Action
Selection Changed POV Arguments	
Server Task	
Selection Changed Server Task	Execute Data Management Sequence
Selection Changed Server Task Arguments	{Full Consolidation}}

Set Up Cube Views Used in Actor Workspace

In OneStream, click **Application** > **Cube Views**. Actor Workspace cube views are under XFT Workspace Executive and XFT Workspace General. The cube views listed below must be updated with the correct POV, the correct entities under the Rows tab, and Accounts under the Columns tab.

Cube Views Executive

The Executive cube views must be updated with the appropriate POV and account list to correctly integrate with the host application. These cube views drive the charts shown on the Executive home page.

ActualProfitByBU_Exec_AWSe1

Displays profit by Business Unit where the business unit information is pulled from variables (BU1Name_AWSe1 - BU3Name_AWSe1).

ActualSalesByBU_Exec_AWSe1

Displays sales by business unit where the business unit information is pulled from variables (BU1Name_AWSe1 - BU3Name_AWSe1).

ActualWorkingCapitol_Exec_AWSe1

Displays Working Capital by business unit where the business unit information is pulled from variables (BU1Name_AWSe1 - BU3Name_AWSe1).

Cube Views General

The General cube views need to be updated with the appropriate POV to correctly integrate with the host application. These cube views drive the status reports and indicators shown on the Executive and Administrator home pages.

CSActual_Gen_AWSe1

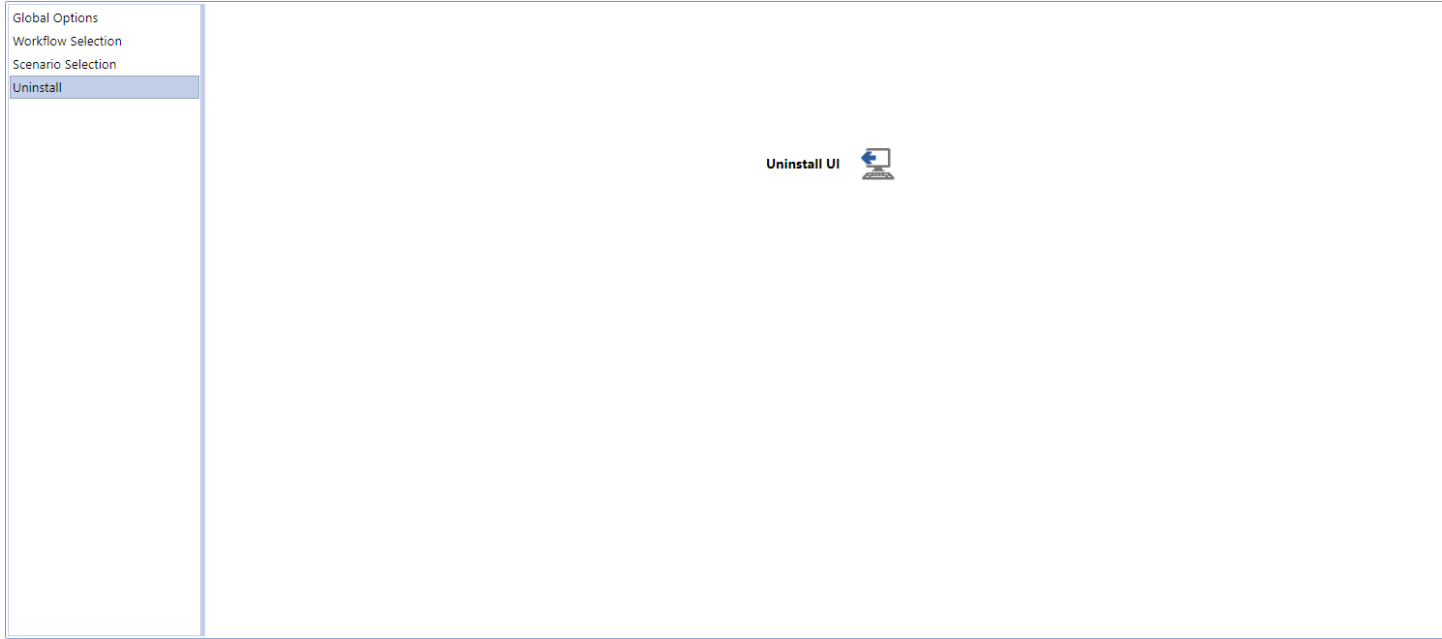
Used to drive the Calculation Status report.

CSActualForStateIndicator_Gen_AWSe1

Used to drive the calculation status indicators.

Uninstall

Use the Uninstall page to remove the Actor Workspace application.



Click **Uninstall UI** to confirm you want to remove the Actor Workspace user interface.

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.