OneStream

Help Desk Guide

PV640 SV100

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Help Desk Overview

Help Desk provides business users with a framework to manage user issues and requests within a company by implementing a simple ticket-based support desk for use within OneStream.

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.

See also: MarketPlace Solution Modification Considerations

Dependencies

Component	Description
OneStream 6.4.0 or later	Minimum OneStream Platform version required to install this version of Help Desk.

Select the Help Desk 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.

It is recommended that Administrators learn the tool and document their Help Desk processes in a Development environment rather than generate test tickets in their Production environment. There typically would not be a need to migrate Help Desk ticket information between Development and Production environments and the only unique setup component is the creation of the Ticket Categories for Help Desk. This creation of the Ticket Categories is a low level of effort that does not warrant migrating the Help Desk tables between applications.

See also: Solution Database Migration Advice

Create the OneStream Development Application

1. Ensure all the OneStream artifacts relating to the Help Desk solution such as **workflow profiles** and **entities** are in the Production application.

2. Copy your Production OneStream application to your Development environment and rename it. This Development version is used for your Help Desk solution project.

Application Server Settings

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

See also: Solution Database Migration Advice

Configure the OneStream Application Server

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

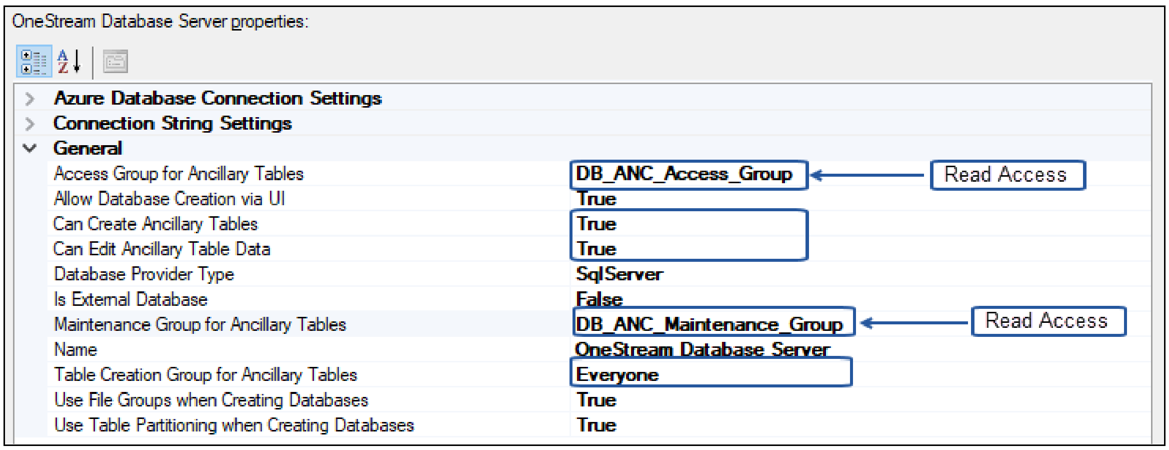
> **Note:** Group settings are applicable to all MarketPlace solutions; it is important to keep the group names generic.

1. Start the OneStream Server Configuration Utility as an Administrator.

2. Click **Open Application Server Configuration File > Database**.

3. Edit the following **OneStream Database Server properties**:

- **Access Group for Ancillary Tables**: Select a group that includes those who will access records.
- **Can Create Ancillary Tables**: True
- **Can Edit Ancillary Table Data**: True
- **Maintenance Group for Ancillary Tables**: Select a group who will edit and maintain tables.
- **Table Creation Group for Ancillary Tables**: Select a group who can create tables.



4. Restart Internet Information Server.

Install Help Desk

1. On the OneStream MarketPlace Dashboard, click **MarketPlace > Help Desk**.

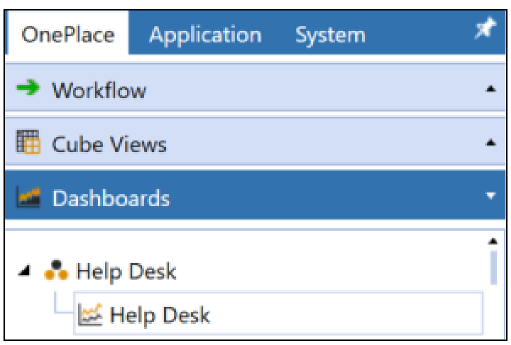
2. On the **Help Desk Solution** page, select the appropriate OneStream platform version from the Minimum Platform Version drop-down list.

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

Set Up Help Desk

The first time you run Help Desk, you are guided through the table setup process.

- In OneStream, click **OnePlace > Dashboards > Help Desk > Help Desk**.



Create Tables and Launch Solution

The first time this solution is run, you are directed to the Help Desk Setup screen.

> **Note:** Prior to running the setup, ensure that the account being used to access SQL server has table creation rights on the SQL database to create the custom tables.

The first step of the setup creates all of the tables required for Help Desk.

1. Click **Step 1: Setup Tables**.

   This step may be necessary when upgrading even if tables already exist. Help Desk does not drop any tables that already exist, but modifies table structures and adds new ones if necessary.

2. When setup is complete, click **Step 2: Launch Solution** to open Help Desk.

Package Contents

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

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

Business Rules: The following Business Rules are included:

HDK_HelperQueries
This is a Dashboard Data Set Business Rule. This rule provides helper queries for report listings, drill queries and reporting statistics that are used to create the Dashboards and provide reporting functionality.

HDK_SolutionHelper
This is a Dashboard Extender Business Rule that provides various helper functions for the Help Desk solution. These helper functions include management of the solution setup, configuration settings, Email, Ticket Editor, and management of ticket attachments.

HDK_ParamHelper
This is a Conditional Parameter helper functions XFBR String Business Rule. This rule is used to provide conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

Database Tables: The following Database Tables are included:

XFW_HDK_ControlLists
This database table stores the Global Options settings for the Help Desk solution.

XFW_HDK_SupportTickets
This database table stores the Help Desk Ticket information.

XFW_HDK_TicketAttachments

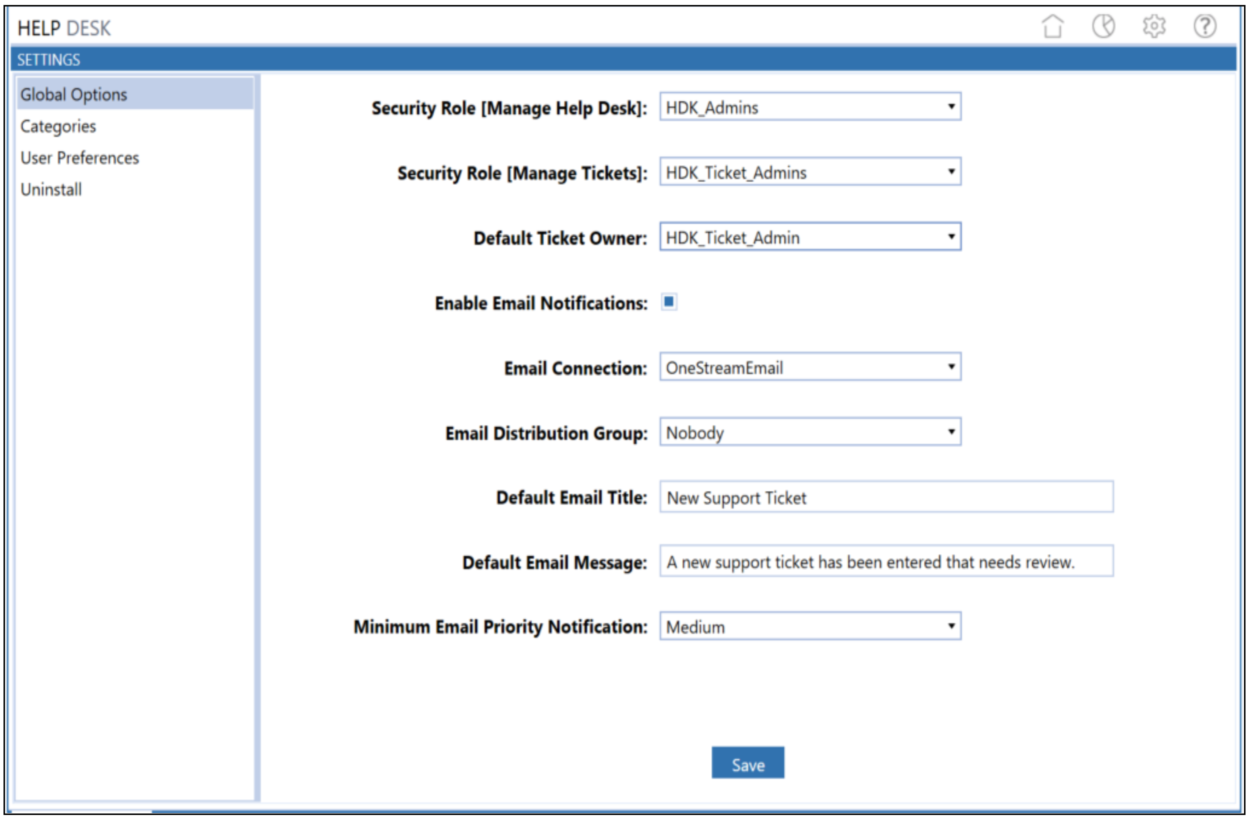
This database table stores the Ticket Attachment information.

XFW_HDK_TicketCategories

This database table stores the information for the Ticket Categories created by Administrators for Ticket reporting and analysis.

Settings

The **Settings** page contains the **Global Options** tab in which key properties that guide administration are set as well as **Categories**, **User Preferences**, and **Uninstall** options.



After updating the settings, click **Save** to save your changes.

Global Options

The Global Options tab allows Administrators to set security roles based on Managing Help Desk or Managing Tickets groupings. The Administrator can also enable email notifications, distribution groups, and a minimum ticket priority to trigger an email notification when support tickets are submitted or updated.

Security Role [Manage Help Desk]
The security group that can access all the Settings pages. The default value is **Administrators**.

Security Role [Manage Tickets]
The security group that can access the Manage Tickets pages. The default value is **Administrators**.

See the *System Administration* and *System Security Roles* sections of the *Design and Reference Guide* for more information on assigning security to different roles.

Default Ticket Owner
Upon install, this field is blank. The Default Ticket Owner is assigned when submitting a new ticket. The list of available users is determined by the security groups assigned in the Manage Help Desk and Manage Ticket settings.

Enable Email Notification
If activated, email notifications are sent to the defined Distribution Group when tickets are created, ticket owner has been reassigned, or if the status is updated.

Email Connection
Select an email connection from the dropdown list. The Email Connections are configured in the OneStream Application Server configuration and contain all of the necessary setup information for the local email provider including the sending email address, server credentials, host, port, and other information. The email connections list comes from the Database Server Connections list in the Application Server configuration.

For more details on email database connections, see the *Installation and Configuration Guide*.

Email Distribution Group
The user group that contains the users who receive the email notifications. Each user in the user group that has a valid email address is included in the distribution.

Default Email Title
The email title displayed in the new ticket email notifications.

Default Email Message
The email message included in the new ticket email notifications.

Minimum Email Priority Notification
Ticket priority level required to send email notifications for new tickets.

If set to High, then email notification is sent only for tickets that have a priority of High. If set to Medium, then email notification is sent for tickets that have a priority set to Medium and High. If set to Low, then email notifications are sent for Low, Medium, and High priority tickets.

Categories

Administrators can customize ticket categories for enhanced support ticket grouping and analysis.

There are three categories available and will default to titles of Category 1, Category 2, and Category 3. Within each Category, the administrator can create and define an unlimited number of sub-categories. The three categories can also be customized by changing the default names to fit your ticket grouping needs. Category titles can be customized or renamed at any time.

Categories for each support ticket display upon creating a new ticket, on the **Ticket Request** page, the **Ticket Detail** pane for each ticket, and in the **Ticket Analysis** page. See "Filter by Category" on page 24 and "Add or Edit Support Ticket Details" on page 17 to see where Categories display on those pages.

The use of Category 2 and Category 3 is dynamic. For example, you can rename Category 1 to Software Requests and Category 3 to Issues without having to create a user-defined name for Category 2. Once the lines are populated under Ticket Categories, the main Category is dynamically added to all areas similar to Category 1.

When migrating to 6.4, Category 1 does not have to be reset.

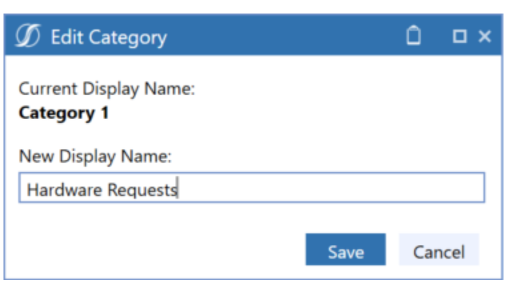
Customize a Category

Categories provide an easy way to group and analyze similar tickets.

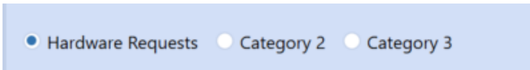
1. In the Help Desk Settings, click **Categories** to display the **Ticket Categories** page. The three categories display at the top of the page.

2. Select the radio button of the category you want to customize, then click **Edit** on the far right. The **Edit Category** dialog displays the current display name for the selected category.

3. Type a descriptive name for the selected category and click **Save**.



The new name for the selected category displays at the top of the **Categories** page.



4. Create sub-categories for the customized category as needed. See *Define Sub-categories for a Category*.

5. Repeat the above steps for other categories you want to define.

Define Sub-categories for a Category

1. At the top of the **Categories** page, select the category for which you want to define a sub-category.

2. In the Ticket Categories grid, click the **Insert Row** button. A new row displays.

3. Click in the Name column of the new row and type a descriptive name for the sub-category.

4. Click in the Description column of the new row and type a descriptive name for the sub-category. The Description displays in the category dropdown list upon creation or modification of the ticket category.

5. Click **Save**.

   After clicking **Save** a sequentially assigned number displays for the sub-category in the row's Order column.

6. Select the order in which you want the sub-category to display by assigning a sequential number order to the Display column.

7. Repeat the above steps for other sub-categories you want to define for the category.

To delete a sub-category, select it and click **Delete Row(s)**, then click **Save**.

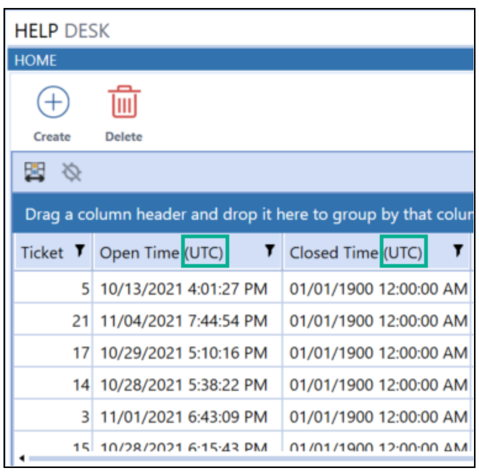
> **Note:** You can edit the description for an existing sub-category, but you cannot edit a sub-category name. If you need to change a sub-category name, you can only delete it if it is not assigned to a ticket (regardless of status). If it is not attached to a ticket, you can delete and re-define it. To do this, select the sub-category and click **Delete Row(s)** and then click **Save**, then follow the steps above to define a new sub-category.

User Preferences

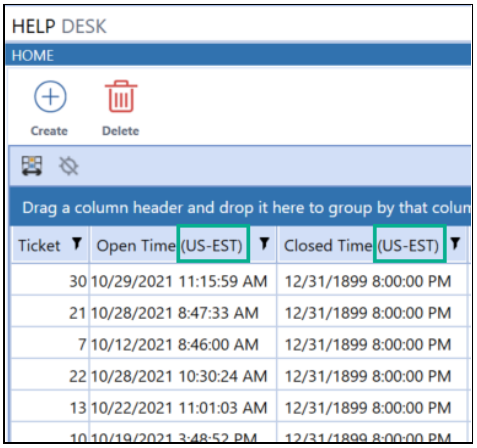
User Preferences settings control how times display to individual users on tickets they have permission to view. Once the User Preferences are set, the Open Time and Closed Time columns in the Support Ticket grid, the Time Stamp column for ticket attachments, and comments in the **Ticket Details** pane are updated.

User Time
The time zone you want to use when viewing ticket Open Time and Closed Time. There is no default user time shown in the User Preferences tab, however, if not set, UTC time is used for the Open Time when a ticket is created.

The following shows the default time stamp (UTC) in the Open Time and Closed Time columns in the **Support Tickets** grid.



If you change the User Time setting, the Open Time and Closed Time column reflects the change. The following shows the change to the column names when the user time is set to US-EST.



Daylight Savings
Select this check box to adjust Open Time and Closed Time information in Help Desk to Daylight Savings time. If not selected, then times do not adjust for daylight savings.

Uninstall

The Uninstall feature allows the Standard Application Reports user interface or the entire solution to be uninstalled. If done as part of an upgrade, any modifications performed on Standard Application Reports objects are removed. There are two uninstall options:

1. **Uninstall UI** removes Help Desk, including related dashboards and business rules but leaves the database and related tables in place. For some releases, this step should be performed before accepting any new version of Standard Application Reports since some of the dashboards or other objects may have been modified.

    - **Choose this option** if you want to accept a Help Desk update without removing the data tables.

    - The Help Desk Release Notes indicate if an over-install is supported.

2. **Uninstall Full** removes all the related data tables, all data, Standard Application Reports dashboards, and business rules.

    - **Choose this option** to completely remove Help Desk or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

Caution: Uninstall procedures are irreversible.

Create Support Tickets

The **Ticket Request** page allows any user of Help Desk to create support tickets.

Administrators can triage open support tickets by assigning an owner to respond to the ticket, changing ticket priority, and updating the status of tickets. Once an existing ticket is highlighted, the Ticket Details section displays to allow updates made to the highlighted ticket.

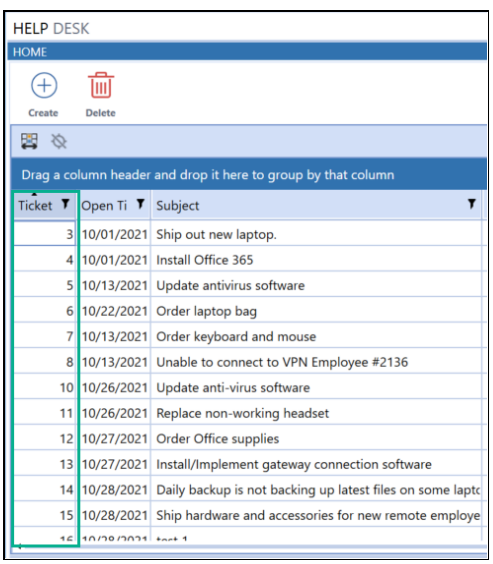
Non-administrative users can also update tickets but the fields that display are restricted based on permissions. All users can add comments or add and view attachments on an active ticket to encourage communication between the ticket creator and the ticket owner.

The ticket Closed Time initially shows the time stamp set to 1/1/1900 12:00:00 AM by default.

Identify Support Tickets Using Ticket Numbers

Once a ticket is submitted, a ticket number is assigned to enhance filtering capabilities. Numbers are assigned in sequential order based on availability. Once the ticket is submitted and assigned a number, that ticket number is not reused. For example, the last ticket submitted is assigned the number 122, and ticket 119 is deleted, the next submitted ticket will be assigned 123.

Ticket numbers display in the leftmost column on the Support Tickets grid by default.



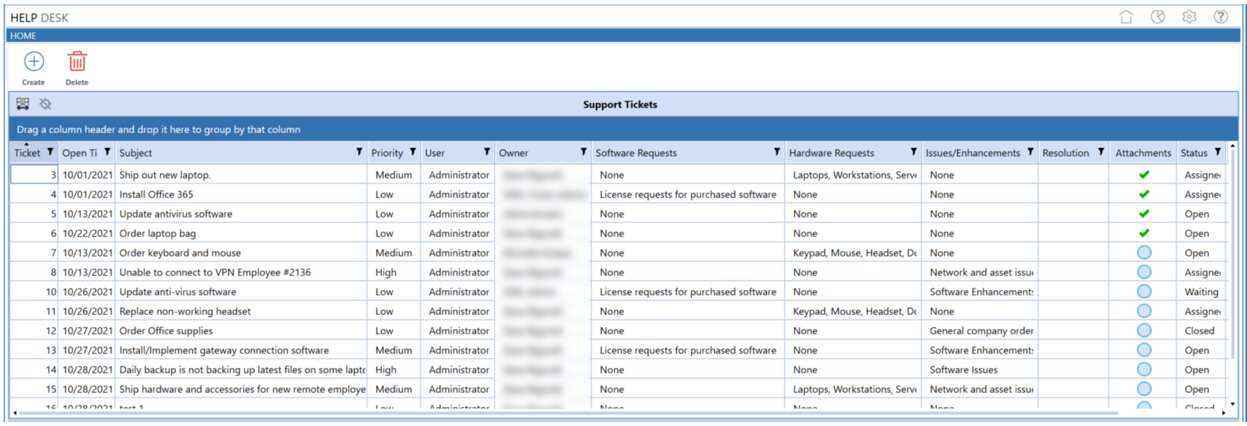
Create a Support Ticket

1. On the **Ticket Request** page, click **Create**. The **Create Ticket** dialog appears.
2. Type a subject to briefly describe what the support ticket is for. A support ticket must include a Subject to submit it.
3. Describe the reason for the ticket in the Description field. This can include any ticket details. A support ticket must include a Description to submit it.
4. Use the priority field to determine the relative importance of the ticket. Options are Low, Medium, or High.
5. (Optional) Use the available Category fields to select sub-categories for the ticket. Adding as much detail to the ticket is encouraged to increase the ease of filtering, searching or analyzing the tickets. See "Categories" on page 10.
6. Upload any available supporting documents as attachments to the ticket. Attachments can provide additional information to support the ticket request. See "Attach Supporting Documents to a Ticket" on page 19 to learn how.
7. Click **Submit** to create the support ticket.

   Note: If you cancel a ticket you are creating, the ticket and any attachments created before submitting the ticket are removed.

The submitted ticket displays in the Support Tickets grid on the Ticket Request page. A number is assigned to the support ticket. The Owner column shows the Default Ticket Owner assignment on the Settings page.

Those in the Manage Help Desk and Manage Tickets security roles can view all tickets. All other users can only view the tickets they submit.



Support Ticket Information

Support Tickets includes the following information that you can edit in the Ticket Details when selecting a ticket.

Ticket
The assigned number of the ticket.

Subject
The short description for the support ticket. This is a quick summary describing what is needed for the ticket.

Description
A detailed description of the ticket. This can include any text that helps users understand what is needed to complete the ticket or any additional ticket information.

> **Note:** Description only displays in the **Ticket Details** pane for a ticket selected in the **Support Tickets** pane. It does not display as a column in the **Support Tickets** pane.

Open Time, Closed Time
The time stamps that show when a ticket was opened and when a ticket was closed. Times are based on individual user settings in the User Preferences options. See "User Preferences" on page 12 for more information.

Priority
Orders a ticket according to its urgency. Valid values are Low, Medium, and High. You can assign a priority when creating a support ticket and you can change it at any time.

Category 1, Category 2, Category 3
Any categories assigned to the ticket. If the administrator does not rename the default headers, these display as Category 1, Category 2, Category 3. If defined, the user-supplied name displays.

See "Categories" on page 10 in the Help Desk Settings for more information on using categories.

Owner
The Default Ticket Owner as assigned from the **Settings** Page. If not assigned, the default value assigned to a ticket is Administrator.

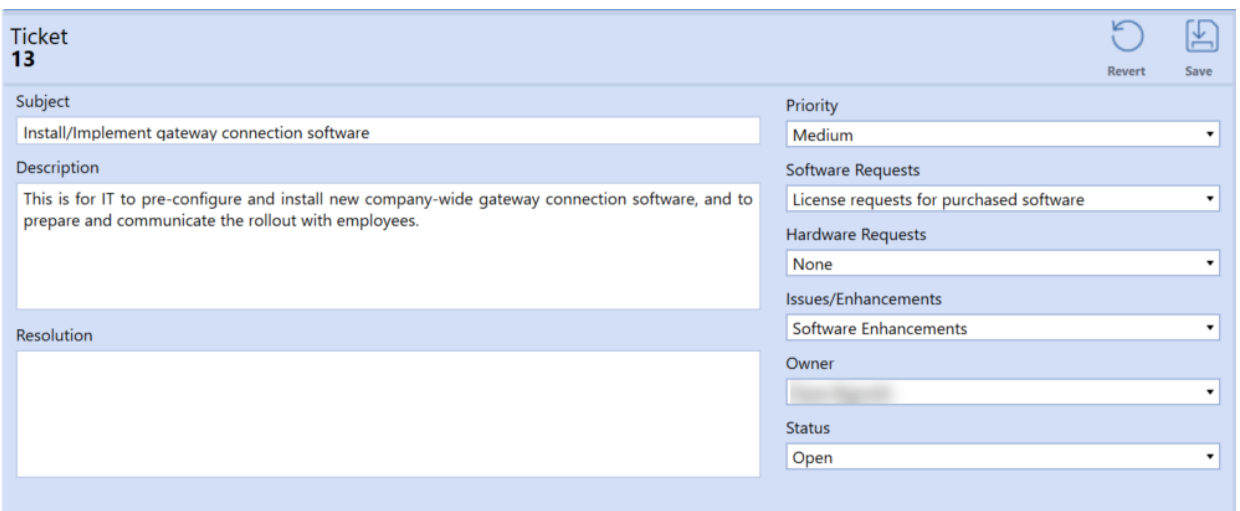
Resolution
Any information supplied by the Ticket Owner to describe how the ticket is resolved. Entering a resolution is not required to move a support ticket to a Closed status.

Attachments
Indicates whether a support ticket includes attachments. A green check in this column indicated an attachment exists on the ticket. See "Attach Supporting Documents to a Ticket" on page 19.

Status
The current stage of completion of the ticket. Valid values are Open, Assigned, Waiting for Information, and Closed.

When the Ticket Owner updates a support ticket status to Closed and saves the ticket, an email notification is sent out to the user who submitted the ticket. The Closed Time field for the selected ticket also updates.

The following shows ticket information in the Ticket Details for a selected ticket.



Add or Edit Support Ticket Details

You can add support ticket details anytime after the ticket is submitted. You can also change or edit the ticket details at any stage of an active ticket.

From within the Ticket Details grid, files can be attached (if not done at the create ticket stage) and comments can be added to any ticket to provide additional details.

To edit or update fields in a submitted ticket:

1. In the Support tickets grid on the **Ticket Request** page, select the ticket.
2. Add or edit the ticket details as needed. See "Support Ticket Information" on page 16.
3. Click **Save** to save any changes you have made to the ticket's details.

Add Commentary to a Support Ticket

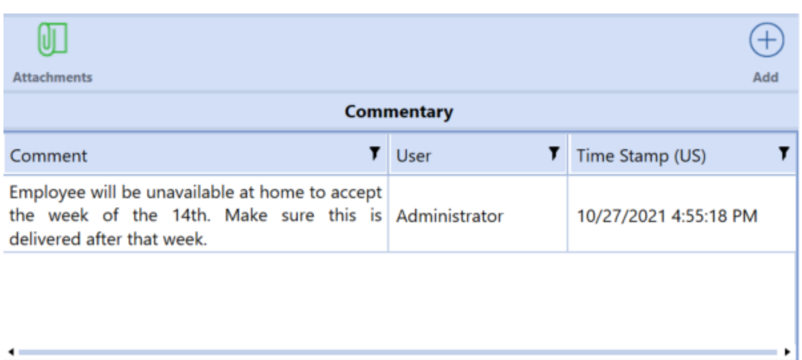
Comments allow support ticket stakeholders to communicate any additional information needed to help expedite a ticket.

Add a Comment

1. In the Support Tickets grid, select the ticket to which you want to add a comment. The Ticket Detail shows any comments for the selected ticket in the right pane.
2. In the ticket detail right pane, click **Add**.
3. In the **Add Comment** dialog, type the information you want in the comment, then click **Submit**.

The comment appears in the Commentary pane. If the ticket includes multiple comments, scroll as needed to see the commentary in the list.

Comments also show the user who submitted the comment, as well as the Time Stamp when the comment was entered.



Delete a Comment

To delete a comment, select it from the list and click **Delete**.

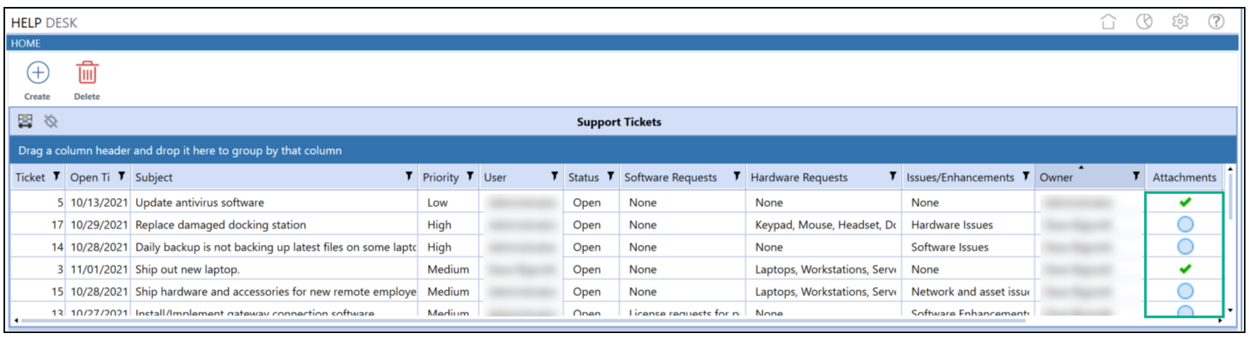
A message appears asking to confirm the deletion. Click **OK**.

> **Note:** Users can only delete comments that they add. Administrators can only delete others' comments if the whole ticket is deleted.

Attach Supporting Documents to a Ticket

You can attach supporting documents to a ticket during ticket creation or after a ticket is created. Any file attached to a support ticket must exist before attaching it.

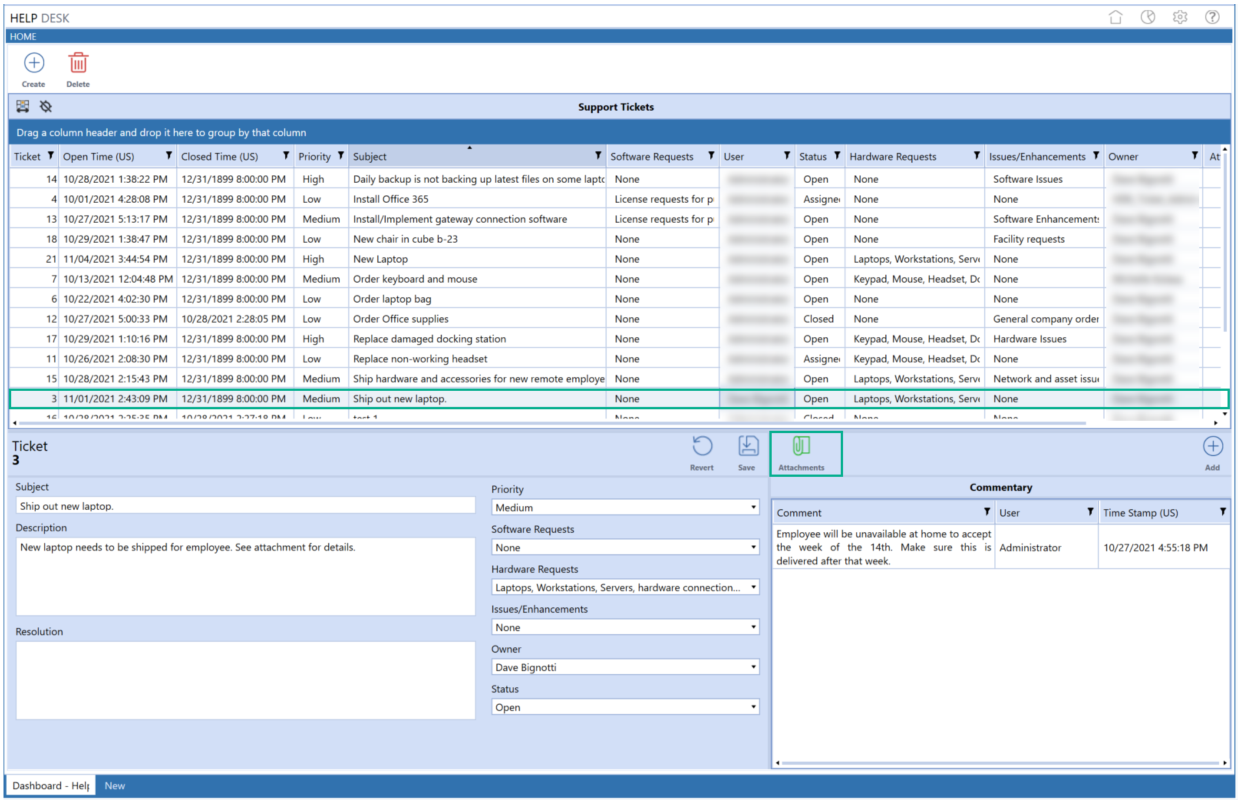
On the Ticket Request page, a green check in the Attachments column of the Support Tickets grid indicates whether a ticket includes attachments.



When you select a ticket, it also indicates if there are any attachments within the ticket. In the following image, Ticket 3 is highlighted and within the ticket details, the Attachments paper clip icon is green indicating that attachments are present.

 = The support ticket has no attachments

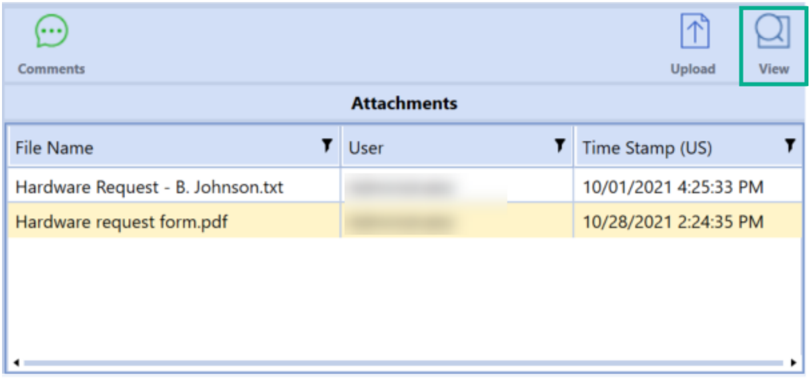
 = The support ticket includes attachments



To attach a file within the selected support ticket:

1. Select the ticket in which the attachment needs to be added.
2. In the **Ticket Details** pane, click on the **Attachments** button. From there, you have the option to upload the attachment.
3. Click **Upload**, then use the **Open** dialog to navigate to and select the file you want to attach.
4. Click **Open**.
5. Click **OK**. Upon uploading, the File Name, User, Time Stamp fields are populated.

The attachment displays in the attachments list. Once in the list, you can view the attachment from The **Ticket Details** pane by selecting the attachment and clicking **View**.



Delete an Attachment

Both users and Administrators can see files attached to a support ticket and delete tickets they have submitted. However, you can only delete attachments you have added to a support ticket.

To delete an attachment:

1. In the Support Tickets grid, select the ticket that includes the attachment you want to delete.

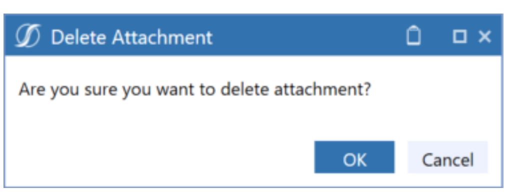
   The Ticket Details for the selected ticket display. The attachments icon changes to indicate if any files are attached to the ticket.

2. Select the attachment you want to delete.

   Note: Users in the Administrator security group can only delete attachments if the whole ticket is deleted. Users can only delete attachments that they have included on the ticket.

3. Click the **Delete** button to remove the selected attachment.

4. A message appears asking to confirm the deletion. Click **OK**.



Delete a Support Ticket

To delete a support ticket, you must be part of the Manage Help Desk or Manage Tickets security group.

1. Select the ticket from the Support Tickets grid and click **Delete**.
2. Click **OK** to confirm.

Deleting a ticket also removes all attachments from the ticket. However, if an attachment is also included in another ticket, the attachment is not removed from that ticket, only from the ticket being deleted.

Analyze Tickets

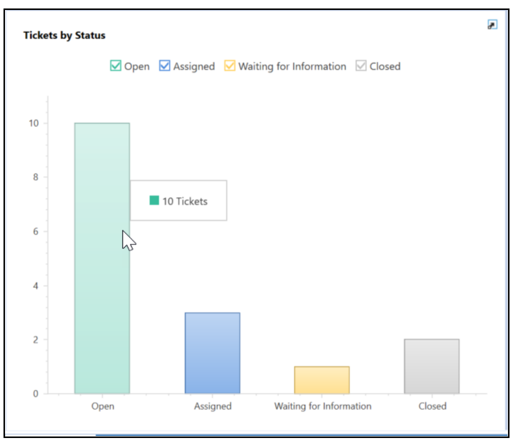
Use **Ticket Analysis** to view opened and closed tickets and gain insights into the status of all qualifying support tickets.

> **Note:** Tickets with a status of Closed are turned off by default. If Closed tickets need to be included in your analysis, click on the Closed Tickets check box in the page header next to the Category dropdown filters. See "Filter Closed Tickets" on page 25.

Two charts are included in **Ticket Analysis**.

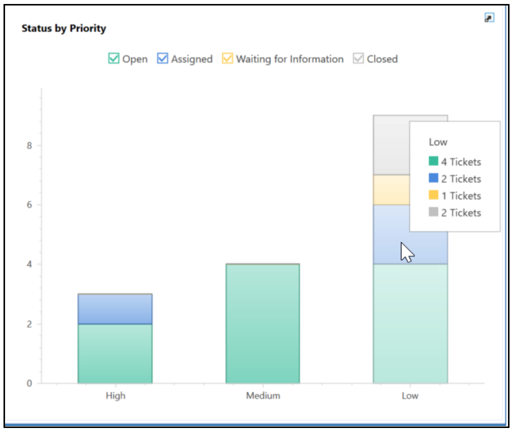
Tickets by Status: Displays a bar on the chart representing each of the available statuses. The numbers on the x-axis indicate the number of tickets in each status.

Hover over any of the bars in the chart to see the number of support tickets for that status.



Status by Priority: Shows a bar on the chart for each ticket priority (Low, Medium High). The numbers on the x-axis indicate the number of tickets in each priority. The bars are further broken down into tiers, with each tier on a bar representing the number of tickets in each status for that priority.

Like the Tickets by Status chart, you can hover over any of the bars in the chart. For the Status by Priority chart, hovering over a bar shows the number of support tickets for each status within the priority.



Use Filters for Precise Ticket Analysis

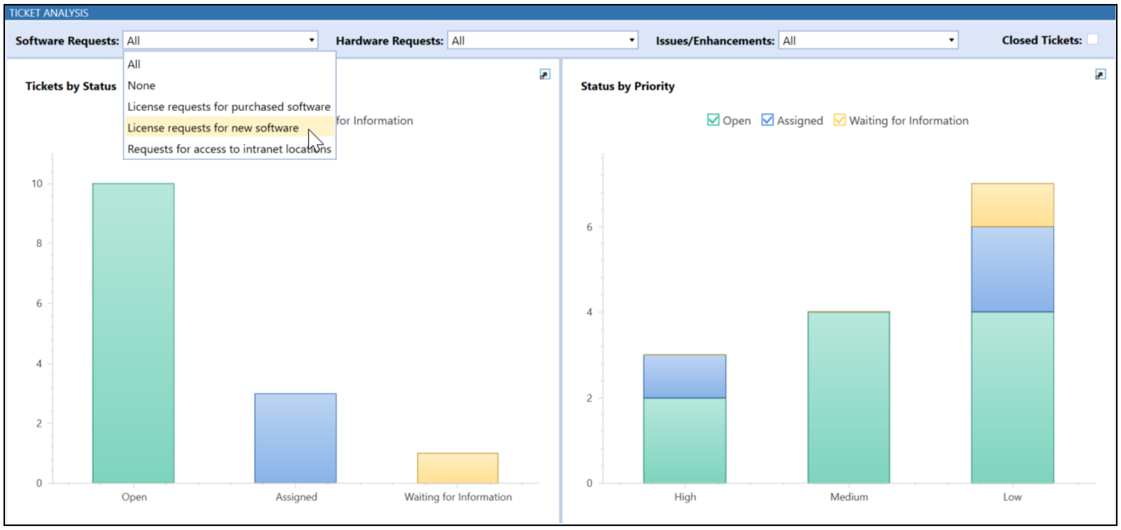
Filter by Category

You can filter the number of tickets represented in the charts by including all or specific sub-categories for the available categories. Use the dropdowns at the top of the Ticket Analysis page to do this. Any categories and sub-categories specified affect both Analysis charts.

If any category has been defined, then the named category displays. Otherwise, the default (Category 1, Category 2, or Category 3) displays.

Define categories using Help Desk's Categories settings. See "Categories" on page 10 for more information on creating user defined categories and sub-categories and to learn how they are used throughout Help Desk.

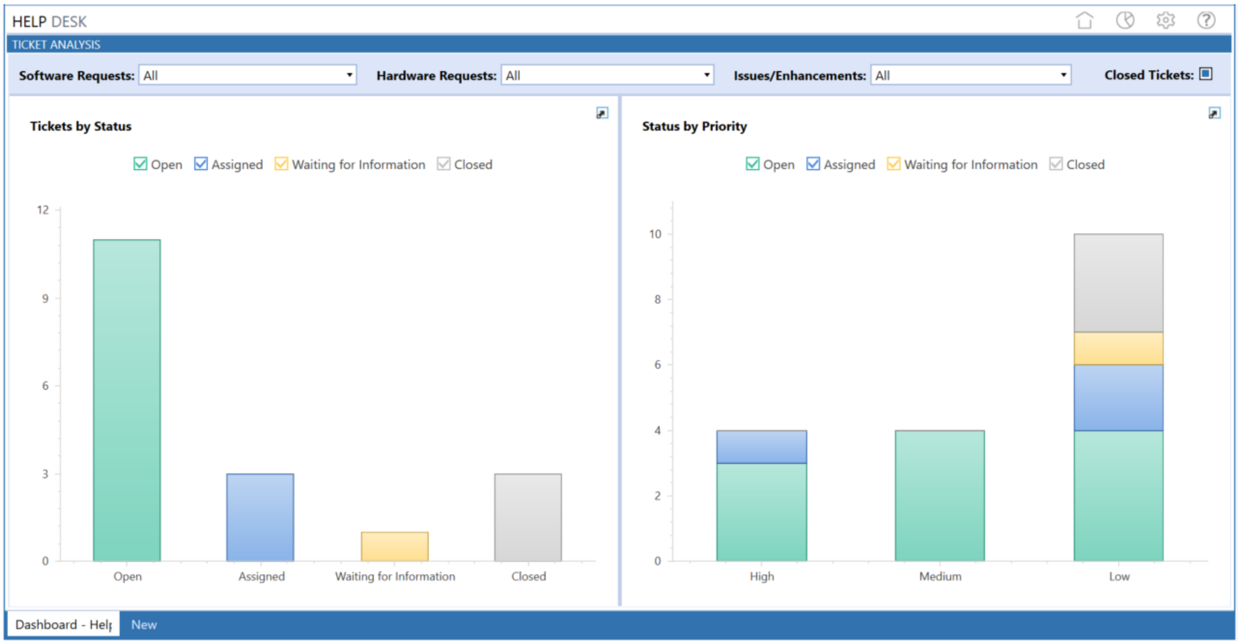
By default, each category's sub-category is set to **All** to display all categories on the charts. To filter by a sub-category, use the drop-down for the category to select the sub-category. Selecting **None** prevents any of the support tickets belonging to the category from displaying in the charts.



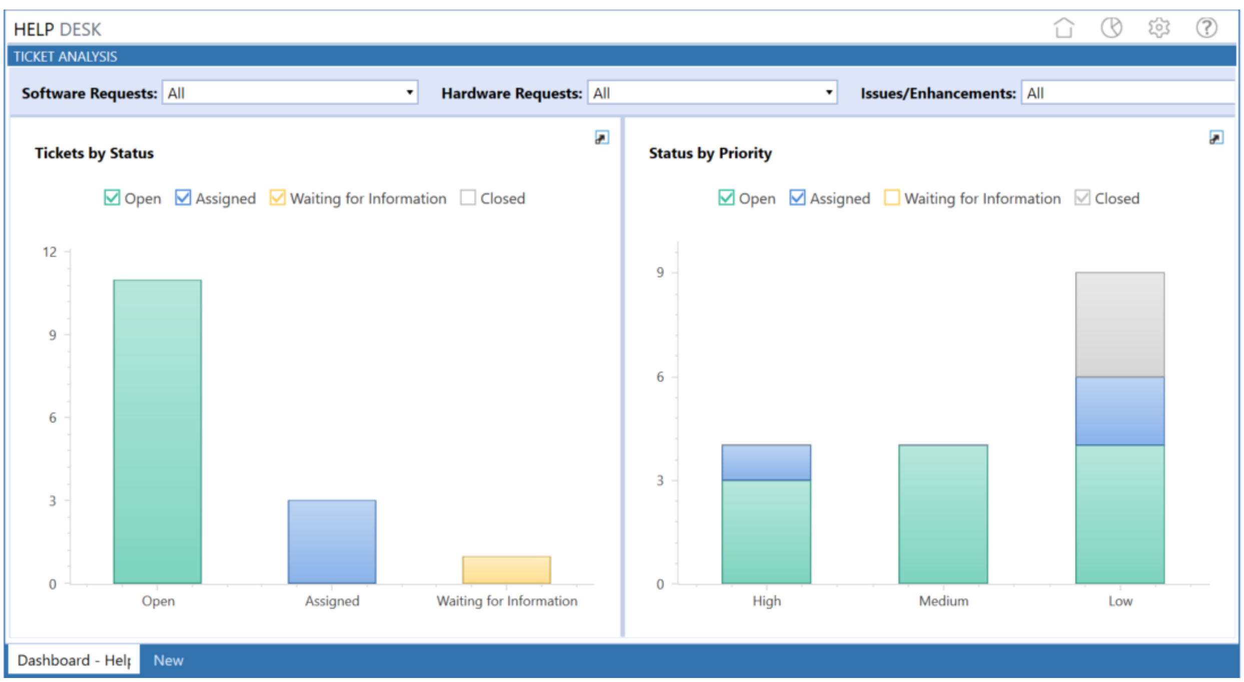
Filter Closed Tickets

To prevent a large number of closed support tickets from skewing the charts, support tickets with a **Closed** status are not included in the ticket analysis graphs by default. Select the **Closed Tickets** check box at the top right of the **Ticket Analysis** page to include tickets with a **Closed** status in the charts. This also displays the Closed check box in the legend at the top of each chart so you can select or clear inclusion of closed tickets on an individual chart basis. See "Filter by Status" on page 27.

The following image shows the charts on the **Ticket Analysis** page, with the Closed Tickets check box selected and the Closed check box included in the legend of each chart.

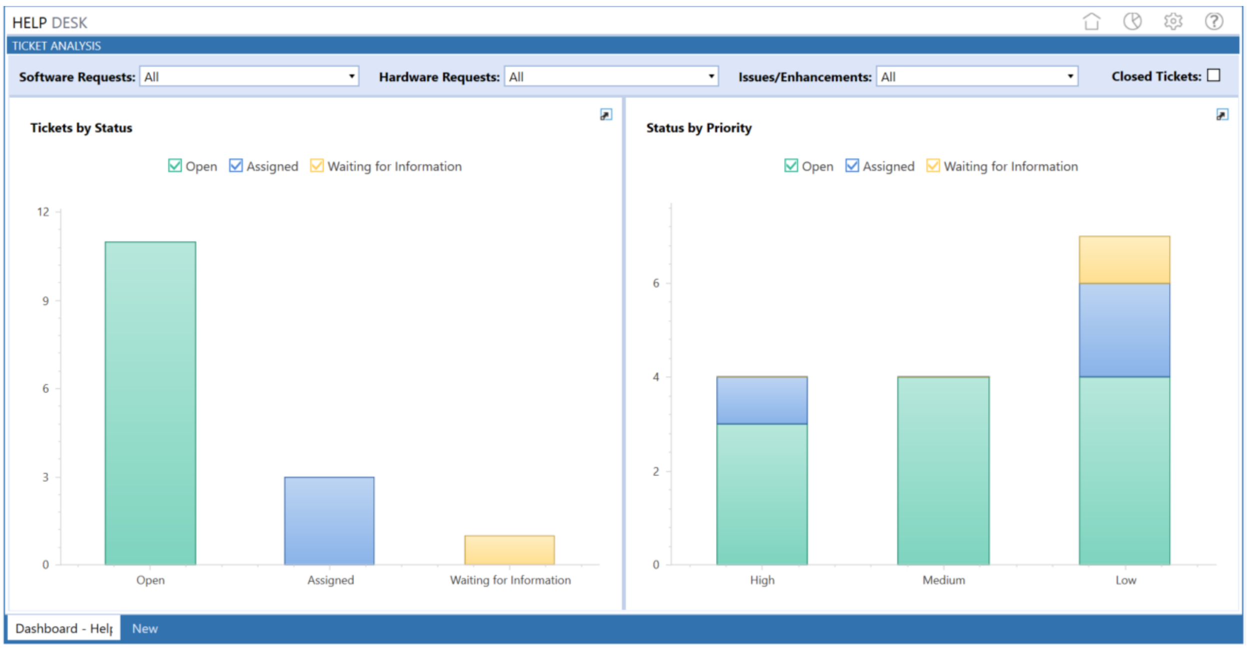


The following image shows the charts on the **Ticket Analysis** page, with the Closed status cleared for the Tickets by Status chart, and the Waiting for Information check box cleared for the Status by Priority chart.



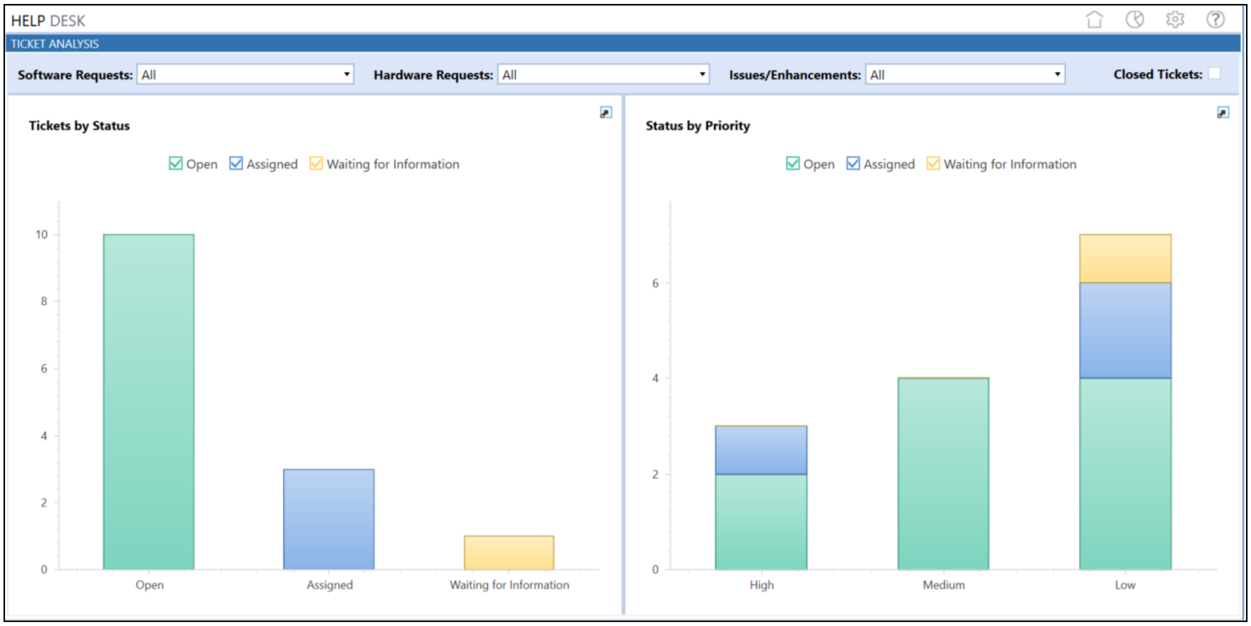
Filter by Status

Charts in the Ticket Analysis page include a legend that lets you further specify the tickets you want to display or exclude in the charts. The legend has check boxes corresponding to the statuses that can be assigned to tickets. To filter the tickets shown in a chart by status, check the boxes for the statuses to include and clear the check boxes of the statuses not to include. These check boxes can be cleared and selected at any time to customize the tickets represented in the charts.



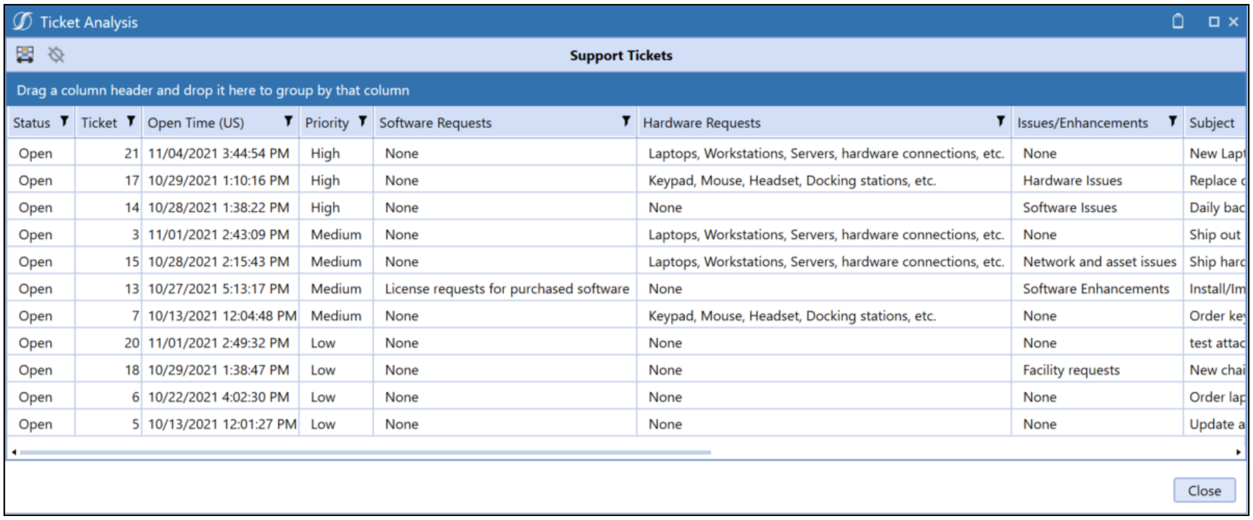
Review Ticket Details From Charts

The Analysis Chart includes drill-down capabilities so you can display the source tickets for each of the displayed groupings.



The bar charts group the tickets by status and priority. Click on any part of a bar in the charts to view the support tickets that are part of the clicked group. Clicking a specific area automatically filters the results based on your selection. For example, if you click on the Open bar from the Ticket by Status chart, the Support Tickets grid appears and displays only tickets in Open status. In the Status by Priority chart, the bars in the chart are sectioned according to priority. You can click on any area of the stacked bar in the chart to view details for just the status within the priority represented.

The selected tickets display in the support tickets grid window. Tickets in the window can be further grouped. See the sections in "Manage Grid Items" on page 30.



Status	Ticket	Open Time (US)	Priority	Software Requests	Hardware Requests	Issues/Enhancements	Subject
Open	21	11/04/2021 3:44:54 PM	High	None	Laptops, Workstations, Servers, hardware connections, etc.	None	New Lapt
Open	17	10/29/2021 1:10:16 PM	High	None	Keypad, Mouse, Headset, Docking stations, etc.	Hardware Issues	Replace c
Open	14	10/28/2021 1:38:22 PM	High	None	None	Software Issues	Daily bac
Open	3	11/01/2021 2:43:09 PM	Medium	None	Laptops, Workstations, Servers, hardware connections, etc.	None	Ship out
Open	15	10/28/2021 2:15:43 PM	Medium	None	Laptops, Workstations, Servers, hardware connections, etc.	Network and asset issues	Ship harc
Open	13	10/27/2021 5:13:17 PM	Medium	License requests for purchased software	None	Software Enhancements	Install/Im
Open	7	10/13/2021 12:04:48 PM	Medium	None	Keypad, Mouse, Headset, Docking stations, etc.	None	Order key
Open	20	11/01/2021 2:49:32 PM	Low	None	None	None	test attac
Open	18	10/29/2021 1:38:47 PM	Low	None	None	Facility requests	New chai
Open	6	10/22/2021 4:02:30 PM	Low	None	None	None	Order lap
Open	5	10/13/2021 12:01:27 PM	Low	None	None	None	Update a

Manage Grid Items

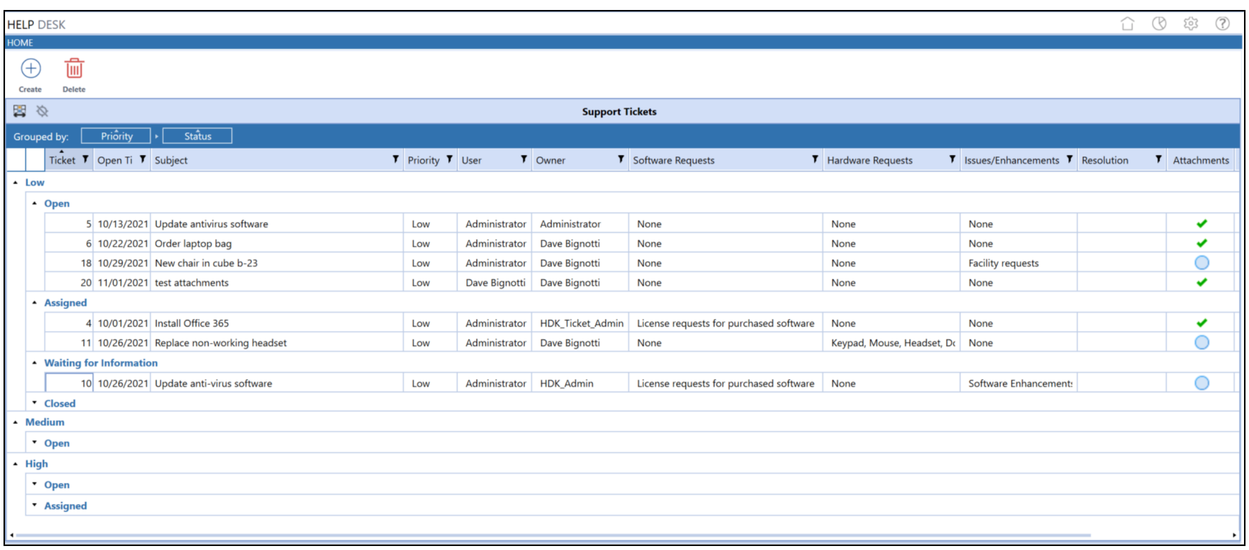
Help Desk provides several features that let you group, filter, and display the data, items and columns in the grid.

Group Grid Items

You can drag and drop column headers to the dark blue bar on top of the column headers to group and display grid items by the dropped column.

Any column or combination of columns can be used. For example, to group tasks by Priority and Status, first drag the Priority column header up to the bar at the top of the grid, then do the same with the Status column header. Dragging and dropping any column header to this area changes it to the Grouped by bar and displays the column header names that you drop into it.

The **Support Tickets** grid shows tasks grouped first by Priority, then by Status.



Column groupings are updated and display as soon as the column is dropped into the bar. When more than one grouping is used, groupings display as nested within its higher-level grouping.

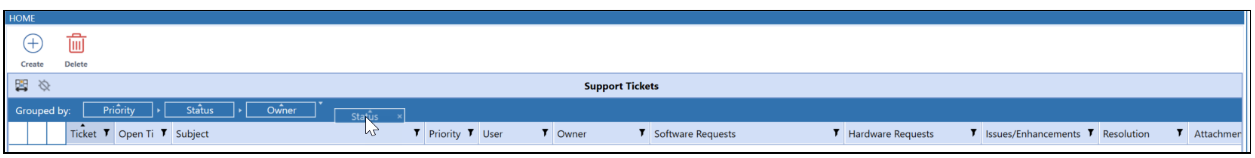
Expand or collapse grouped items by clicking the **Expand** and **Collapse** widgets on the top left of each grouping.

Any column groupings you make are retained between Help Desk sessions. Groupings stay in place until you change them or remove them.

To remove a grouping, hover over the column group you want to remove, then click the x that appears in the group box. You can also click the column group header in the **Grouped by** bar and drag it anywhere outside of the bar to remove it. Removing all groupings restores the list to its original state.

You can also change the list of items within groupings between ascending order and descending order by clicking the ascending/descending widget on the top of the column group box.

When grouping grid items by multiple groups, you can also easily change grouping hierarchy by dragging and dropping a grouping box to the desired grouping level.



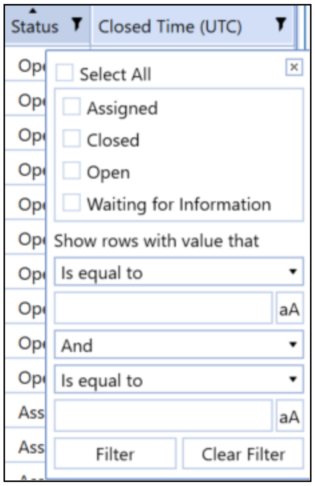
Filter Items that Display in a Grid

Grids allow you to use filters to display a subset of the grid's items. This is useful when working with large numbers of items in a grid and lets you easily focus on the items you need to work with.

Any column reordering stays in state until you change it. In other words, column ordering is remembered and retained from session to session until changed.

Any grid with columns that include the **Filter** button in the column header let you use filtering criteria to display the items that meet the filtering criteria you define for that column.

In any grid column, you can click the **Filter** button to display the **Filter Criteria** dialog.



Start by selecting the specific items to include in the filter. Items that you can choose from are based on specific item values available in the selected column. You can select all items, specific items, or a single item for filtering.

Use the remaining fields to optionally build a filter expression to further filter the items to display in the grid. Use the fields to define the logical operators and relational operators in the filter expression. When a logical operator requires a value, use the text box below the logical operator list box to enter the value. Click the **Case** button next to the value if you want case matching to apply to the entered value.

Click **Filter** to apply the filter to the selected task group or task list.

Reorder Grid Columns

Each column in a grid can be moved, so you can customize the display order of columns. This is useful with grids that display many columns, letting you customize the display order to see the column data most important to you. This lets you move the most important columns to the visible area of the grid, so you don't have to scroll right and left to see those columns.

To reorder a column in a grid, just click and drag the heading of the desired column and drag it to its new position in the grid.

Help and Miscellaneous Information

Display Settings

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

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

Package Contents and Naming Conventions

The package file name contains multiple identifiers that correspond with the platform. Renaming any of the elements contained in a package is discouraged in order to preserve the integrity of the naming conventions.

Example Package Name: HDK_PV6.4.0_SV100_PackageContents.zip

Identifier	Description
HDK	Solution ID
PV6.4.0	Minimum Platform version required to run solution
SV100	Solution version
PackageContents	File name

Solution Database Migration Advice

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

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

In the production OneStream application, install the solution and create the data tables. See Configure the OneStream Application Server for Database Server Connection settings and installation details.

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 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.