



# XperiFlow

# Administration Tools Guide

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PV650 SV100

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# Table of Contents

Overview .....	1
Setup and Installation .....	2
Dependencies .....	2
Set Up XperiFlow Administration Tools .....	2
Settings .....	3
Global Settings .....	3
Uninstall .....	4
Navigate in XperiFlow Administration Tools .....	5
XperiFlow Administration Tools Home Page .....	5
XperiFlow Administration Tools Sections .....	6
Toolbar Icons .....	7
Upgrade Section .....	8
Version Page Layout .....	8
Run a Version Upgrade .....	9
Upgrade Servers .....	9
Port Databases .....	11
Resolving an Error .....	12

**Table of Contents**

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Help and Miscellaneous Information ..... 14

    Display Settings ..... 14

    Package Contents and Naming Conventions ..... 14

    MarketPlace Solution Modification Considerations ..... 14

# Overview

This document details the XperiFlow Administration Tools user interface, including functionality and requirements of each page. Information includes:

- How to interact with a page.
- What happens in the AI Services engine based on user interactions.

# Setup and Installation

This section contains details for planning, configuring, and installing the XperiFlow Administration Tools solution. Before you install the solution, familiarize yourself with these details.

See also: [MarketPlace Solution Modification Considerations](#)

## Dependencies

Component	Description
OneStream 6.5.0 or later	Minimum OneStream Platform version required to install this version of XperiFlow Administration Tools.

## Set Up XperiFlow Administration Tools

There are multiple steps to set up XperiFlow Administration Tools.

1. Download the XperiFlow Administration Tools Solution from the OneStream Marketplace.
2. After the OneStream support team ensures that the proper contract is in place, they send a link to download the Sensible Machine Learning solution and a meeting request to complete the setup, which includes setting the endpoint parameter.
3. When you reach the **Home** page displayed in [XperiFlow Administration Tools Home Page](#), XperiFlow Administration Tools is set up correctly and functioning properly.

**NOTE:** Only Administrators or users in the XAT Administration user group can access the XperiFlow Administration Tools solution.

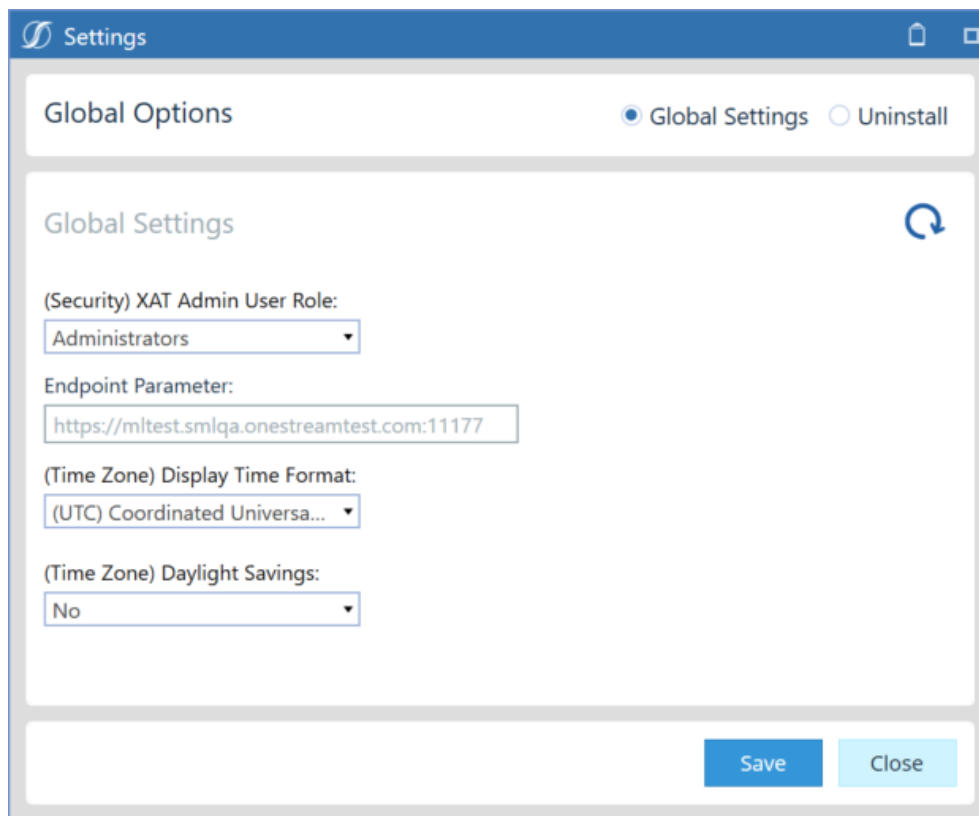
# Settings

To access the global options page, click **Settings**  in the bottom left corner of the **Home** page or the **Version** page.

Global options include:

- [Global Settings](#)
- [Uninstall](#)

## Global Settings



The screenshot shows a dialog box titled "Settings" with a sub-header "Global Options". It contains two radio buttons: "Global Settings" (selected) and "Uninstall". Below this is a section titled "Global Settings" with a refresh icon. The settings are as follows:

Setting	Value
(Security) XAT Admin User Role:	Administrators
Endpoint Parameter:	https://mltest.smlqa.onestreamtest.com:11177
(Time Zone) Display Time Format:	(UTC) Coordinated Universa...
(Time Zone) Daylight Savings:	No

At the bottom right, there are "Save" and "Close" buttons.

## Settings

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**(Security) XAT Admin User Role:** Select who can run an XperiFlow engine upgrade and access the global settings content. The default is **Administrators**.

**Endpoint Parameter:** Predefined endpoint to access the application.

**NOTE:** Do not make changes to this value unless instructed to do so.

**(Time Zone) Display Time Format:** Custom time zone option. The default is **(UTC) Coordinated Universal Time**.

**(Time Zone) Daylight Savings:** Defines whether Daylight Savings time is observed. The value automatically populates based on the selected time zone. The default is **No**.

## Uninstall

There are two uninstall options:

- **Uninstall UI** removes XperiFlow Administration Tools, including related dashboards and business rules but leaves the database and related tables in place.

Choose this option if you want to accept a XperiFlow Administration Tools update without removing data tables.

- **Uninstall Full** removes all related data tables, data, XperiFlow Administration Tools dashboards, and business rules.

Choose this option to completely remove XperiFlow Administration Tools 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.

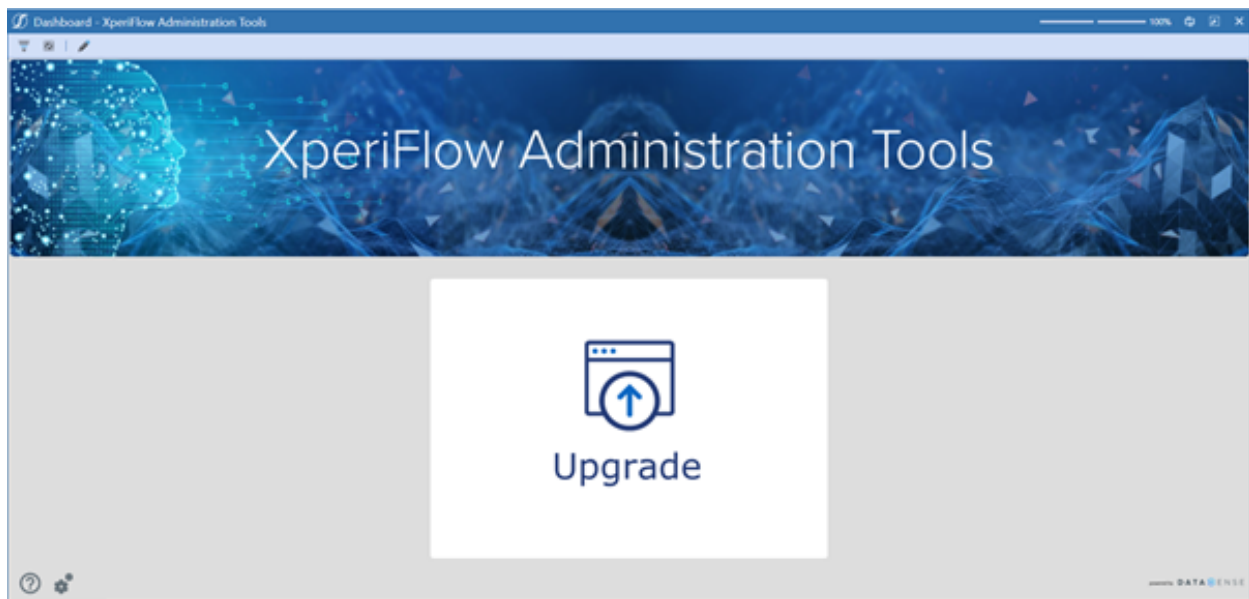


# Navigate in XperiFlow Administration Tools

The following sections describe the ways to navigate in XperiFlow Administration Tools.

## XperiFlow Administration Tools Home Page



The Home page displays the different administration tools available to the user.



Use the Home page to:

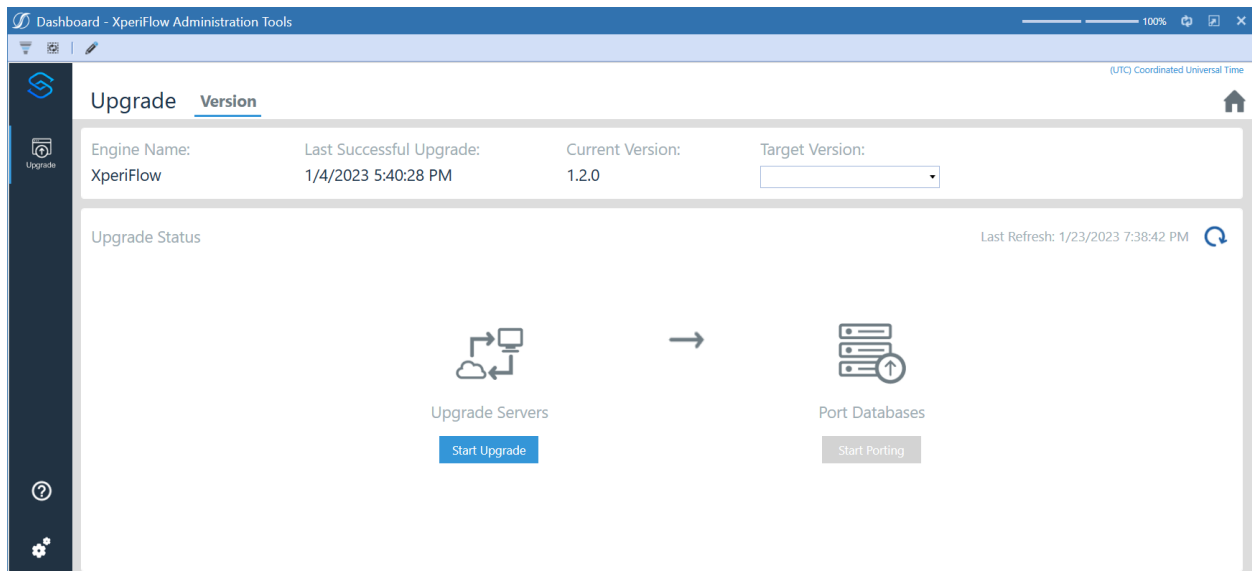
- Navigate to the Upgrade section.
- Access the following toolbar icons.

## Navigate in XperiFlow Administration Tools

Icon	Description
	Opens the XperiFlow Administration Tools Guide
	Opens the XperiFlow Administration Tools settings. Configure global settings options and uninstall the solution. See <a href="#">Settings</a> .

## XperiFlow Administration Tools Sections

The left side navigation includes different sections and the top left navigation shows the pages available in the selected section. Currently, only the Upgrade section exists. It includes one page, the **Version** page.



Dashboard - XperiFlow Administration Tools

Upgrade Version




Engine Name: XperiFlow    Last Successful Upgrade: 1/4/2023 5:40:28 PM    Current Version: 1.2.0    Target Version:

Upgrade Status    Last Refresh: 1/23/2023 7:38:42 PM

Upgrade Servers    Port Databases

Start Upgrade    Start Porting

# Toolbar Icons

Icon	Description
 Home (top right)	Navigate to the Home page
 Help (bottom left)	Opens this XperiFlow Administration Tools Guide
 Settings (bottom left)	Opens the XperiFlow Administration Tools settings. Configure global settings options and uninstall the solution. See <a href="#">Settings</a> .

Each section page includes a **Home** button at the top right of the page and a set of buttons at the bottom left of the page that provide additional navigation, settings, or help. Your selected time zone displays in the top right corner of the page above the **Home** button.

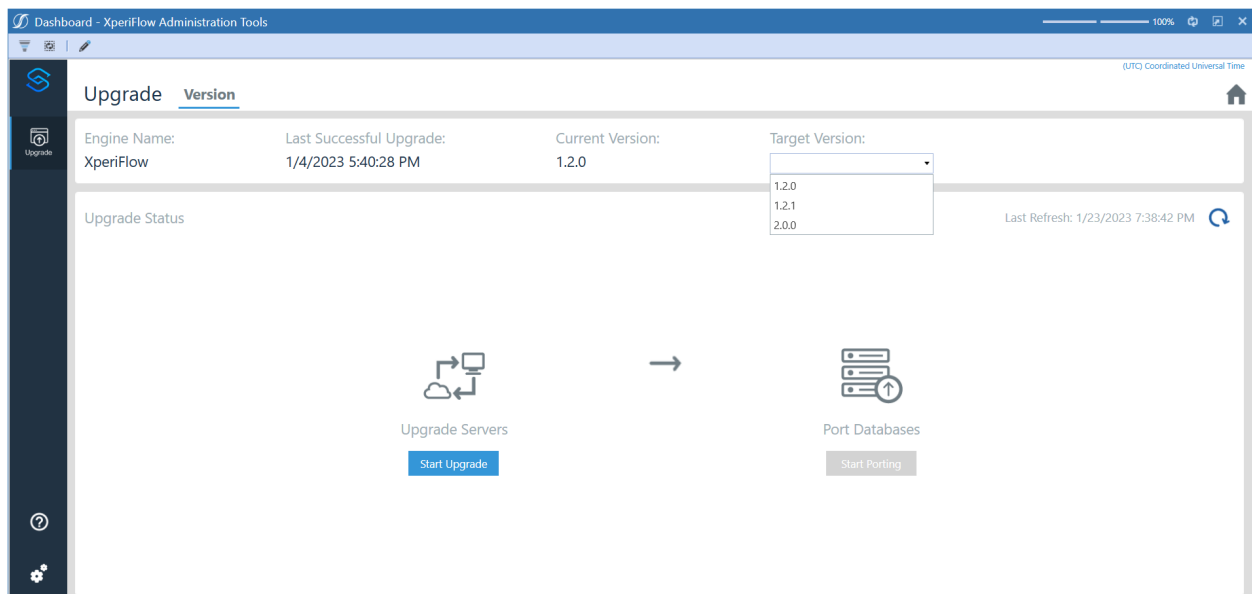
# Upgrade Section

The following section describes the layout and functionality of the **Version** page in the Upgrade section.

- [Version Page Layout](#)
- [Run a Version Upgrade](#)

## Version Page Layout

**TIP:** The following image shows the **Version** page in its initial state.



The top pane of the **Version** page includes the following:


- **Engine Name:** Name of the engine to be upgraded (XperiFlow).
- **Last Successful Upgrade:** Date and time of the last successful upgrade.

## Upgrade Section

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- **Current Version:** Current XperiFlow engine version that exists in your OneStream environment.
- **Target Version:** Drop-down list of all available XperiFlow engine versions.

The bottom page of the **Version** page includes the following:

- A **Refresh** button  to monitor the status of the current job in progress.
- The date and time of the last refresh.
- The **Upgrade Servers** icon and **Start Upgrade** button
- The **Port Databases** icon and **Start Porting** button.

## Run a Version Upgrade

The version upgrade includes the following:

### Upgrade Servers

To begin the version upgrade process:

1. Select an engine version from the Target Version drop-down list.

**NOTE:** The selected target version must be a more recent version than the current engine version.

2. Click **Start Upgrade**.

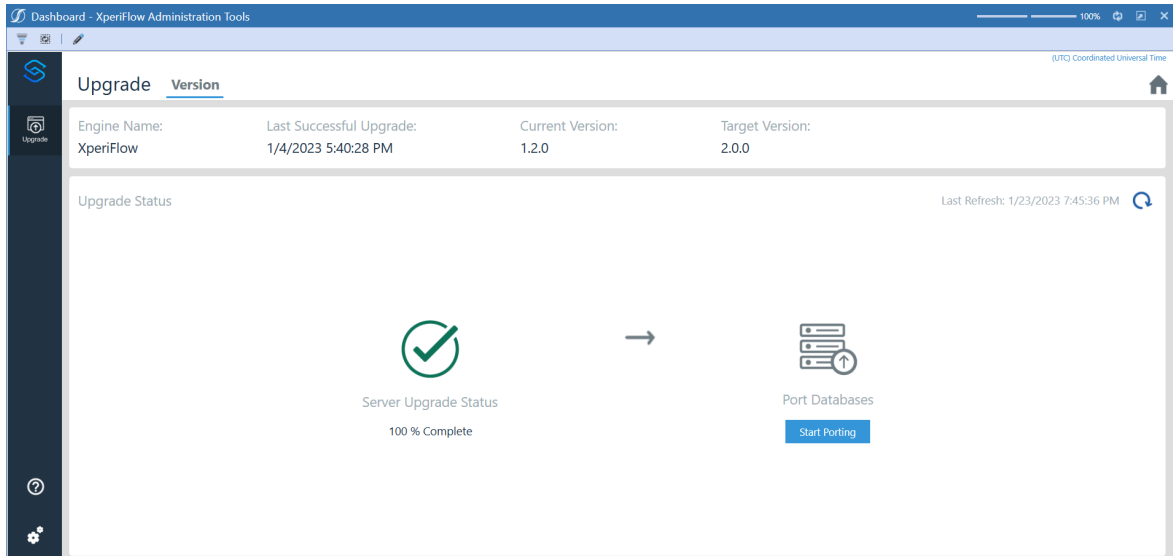
**NOTE:** You cannot change Global Settings or perform an uninstall once the Server Upgrade is running.

3. Click **Refresh** to check the server upgrade status.

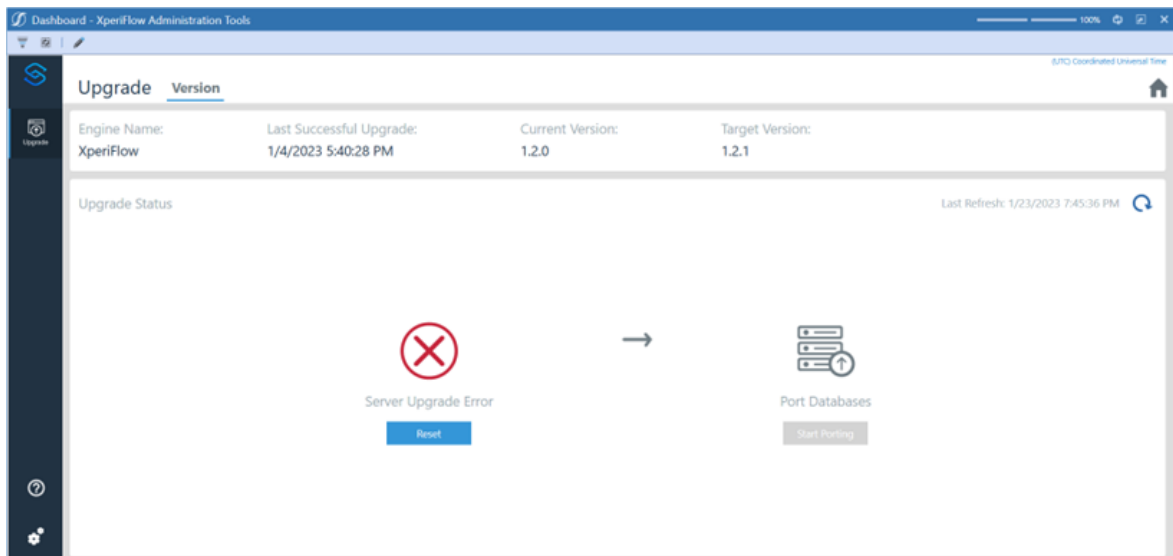
**NOTE:** The status percentage does not update until at least one of the scale sets has successfully updated. It is common for the percent complete to stay at zero percent for 15 minutes, even if you refresh. Compare the last refresh time to confirm a successful refresh.

## Upgrade Section

If you refresh and the server upgrade has successfully completed, the **Version** page displays as shown in the following graphic:



If you refresh and an error has occurred while upgrading servers, the **Version** page displays the following:



**NOTE:** If an error occurs, you cannot continue and must submit a Support ticket to resolve the issue.

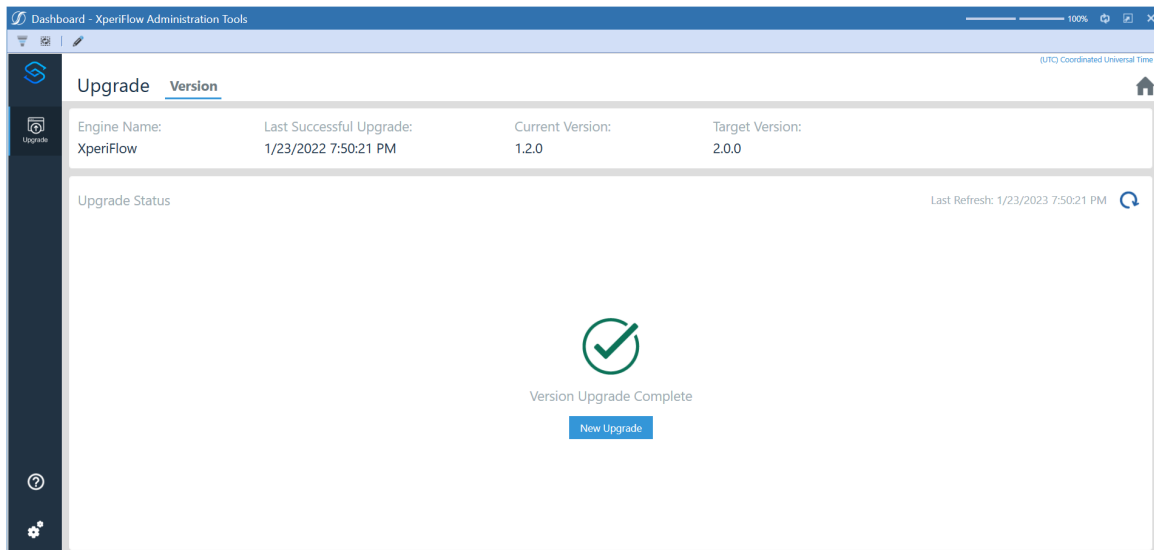
If the Server Upgrade successfully completes, continue to [Port Databases](#).

# Port Databases

1. In the Upgrade Status pane, click **Start Porting**.

**TIP:** Click **Refresh** to check the porting job status.

If you refresh and the porting job has successfully completed, the following displays.



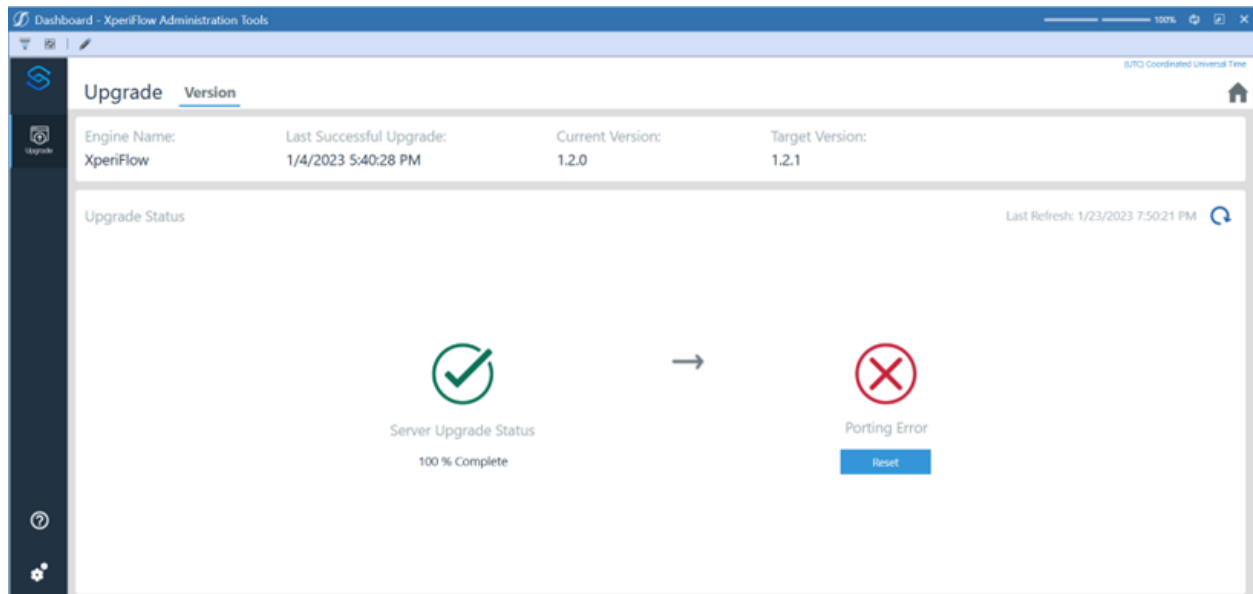
The XperiFlow Engine upgrade is now complete. The selected Target Version should now display as the Current Version. The Last Successful Upgrade time is also updated.

2. Click **New Upgrade** to start the new upgrade.

If you refresh and an error has occurred while upgrading, the following displays:

## Upgrade Section

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**NOTE:** If an error occurs, you cannot continue and must submit a Support ticket to resolve the issue.

## Resolving an Error

Follow the next steps after a support ticket has been resolved :

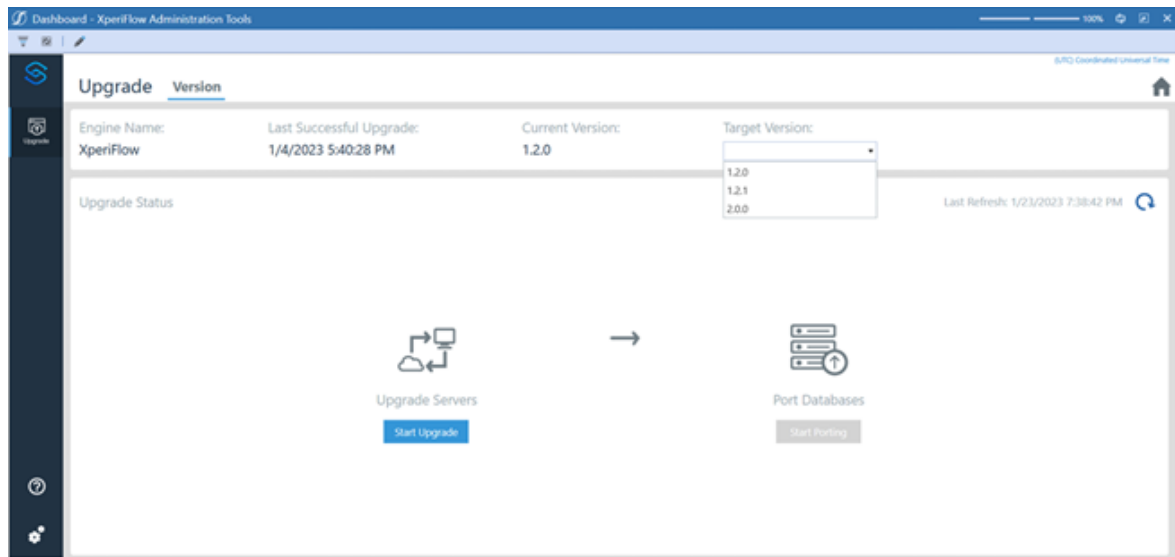
1. Click **Reset** under the Error icon.
2. Follow the prompt in the dialogue box to resolve the error.



## Upgrade Section

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3. Once the error has been resolved, the following displays in the **Version** page.



# 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:** XAT\_PV6.5.0\_SV100\_PackageContents.zip

Identifier	Description
XAT	Solution ID
PV6.5.0	Minimum Platform version required to run solution
SV100	Solution version
PackageContents	File name

## MarketPlace Solution Modification Considerations

A few cautions and considerations regarding the modification of MarketPlace solutions:

## Help and Miscellaneous Information

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- 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.