# DATA ENTRY 123

## SETUP INSTRUCTIONS

PV 440 SV 100

# CONTENTS

Overview ..... 4
Getting Started ..... 5
Select the Data Entry 123 Development Location ..... 5
Create the OneStream XF Development Application ..... 5
Application Server Settings ..... 5
Configure the OneStream XF Application Server ..... 5
Installation & Setup ..... 7
Installing Data Entry 123 ..... 7
Package Contents & Naming Conventions ..... 8
Data Entry 123 Setup ..... 9
Dashboard Maintenance Unit ..... 10
Business Rules ..... 10
Home ..... 11
Settings ..... 12
Global Options ..... 12
Uninstall Options ..... 12
Framework ..... 14
Selectors ..... 15
Selector Bar ..... 15
Selector Lists ..... 15
List Items ..... 16
Calculations ..... 17
Calculation Lists and Calculations ..... 17
Expression List ..... 18
Forms 18
Form Groups ..... 20
Forms (by Group) ..... 20
Form Usage ..... 21
Form Sets ..... 21
Form Set Members ..... 21
Workflow Assignment ..... 22

SETUP ..... 23
Selector Setup Steps ..... 23
Calculation Setup Steps ..... 24
Forms Setup Steps ..... 25
Workspace Data Entry Setup ..... 25
Form Input Data Entry Setup ..... 26
Required Form Input Data Entry Setup ..... 29
EXAMPLES ..... 30
Selector Example ..... 30
Calculation Example ..... 32
Workspace Example Built ..... 32
Help & Miscellaneous Information ..... 33
Optimal Display Settings ..... 33
MarketPlace Solution Modification Considerations ..... 33

# OVERVIEW

Data Entry 123 Solution is a contextual development environment utilized for creating data entry forms. The framework provides a simple design paradigm which facilitates quick form building. This centralized approach helps standardize the look and feel across forms while easing the change management process of Forms, Selectors and Calculations.

# Getting Started

Use the following information to understand prerequisites and dependencies, plan your installation, and configure the database server.

> **Note**: Before beginning setup, verify that the SQL server has table creation rights on the SQL database to create the custom tables.

## Select the Data Entry 123 Development Location

Before you begin the installation, you must decide whether to build Data Entry 123 directly in the Production OneStream XF application or in a separate Development OneStream XF application. This section provides some key considerations for each option.

**Production OneStream XF Application:** The primary advantage of building Data Entry 123 in your 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 that is being used in a Production capacity and this is seldom advised.

> **Note**: It is strongly recommended that you implement **Data Entry 123** in the Development environment with a fresh copy of the Production application before starting work.

**Development OneStream XF Application:** As a Best Practice, use the Development OneStream XF application to build Data Entry 123.

**See Also**: Modifying MarketPlace Solutions

### Create the OneStream XF Development Application

1. Ensure that all the OneStream XF artifacts you want to relate to in Data Entry 123 such as **Workflow Profiles** and **Entities** are in the Production application.
2. Copy your Production OneStream XF application to your Development environment and rename it. This Development version will be used for your Data Entry 123 project.

## Application Server Settings

You may need to edit the OneStream XF Application Server Configuration so users can create and change data in the additional database tables used by Data Entry 123. If other MarketPlace Solutions (such as Specialty Planning) are already in the application, these adjustments may already exist.

### Configure the OneStream XF Application Server

Be sure that these security group settings include those who will be working on and setting up Data Entry 123 before you begin.

**Note**: Group settings are applicable to all XF Marketplace Solutions; it is important to keep the group names generic.

1. Start the OneStream XF Server Configuration Utility as an Administrator.
2. Select 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.

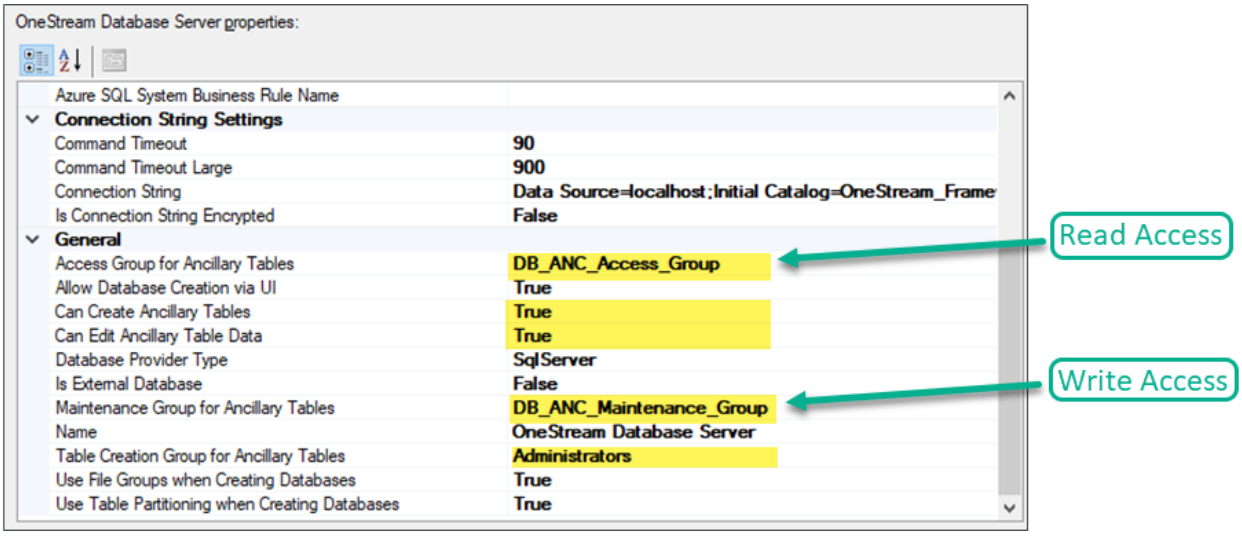
   **Can Create Ancillary Tables:** True

   **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:** Administrators

4. Restart Internet Information Server (IIS).



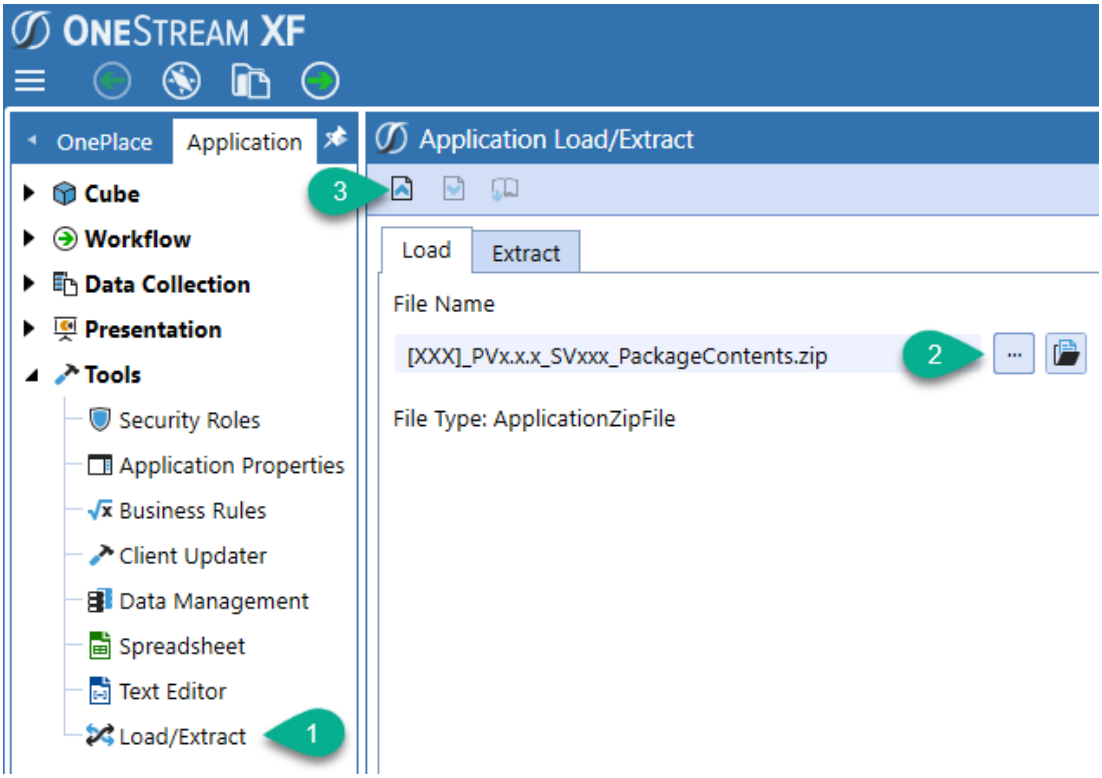
# Installation & Setup

All Solutions can be downloaded from the MarketPlace. Please check the Release Notes for summarized changes of note, prior to installation.

## Installing Data Entry 123

1. From the OneStream XF MarketPlace Dashboard, click **MarketPlace** > Data Entry 123.

2. On the Data Entry 123 Solution page, select your OneStream XF platform version from the **Minimum Platform Version** dropdown list.
   This selection automatically displays the appropriate solution version in the next box.
3. Select the most recent version from the **Solution Version** dropdown list and then click **Download**.
4. Log in to OneStream XF.
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. When the solution's file name appears, click **Load.**
8. Click **Close** to complete the installation.




## Package Contents & Naming Conventions

The package filename 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.

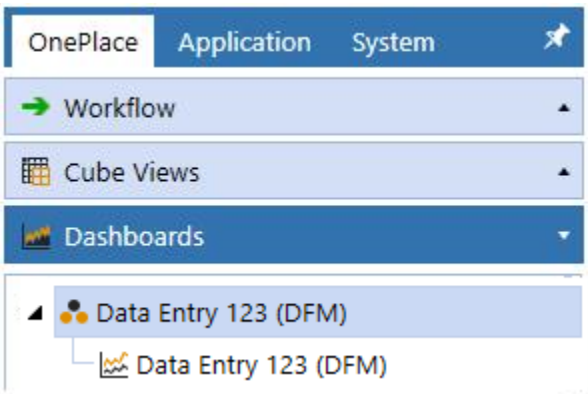
Example package name: DFM_PV4.4.0_SV100_PackageContents.zip

| Identifier | Description |
|---|---|
| **DFM** | Solution ID |
| PV440 | Minimum XF Platform version required to run solution |
| SV100 | Solution version number |
| PackageContents | Filename |

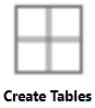
## Data Entry 123 Setup

The first time Data Entry 123 is run, you will be guided through the table setup process.

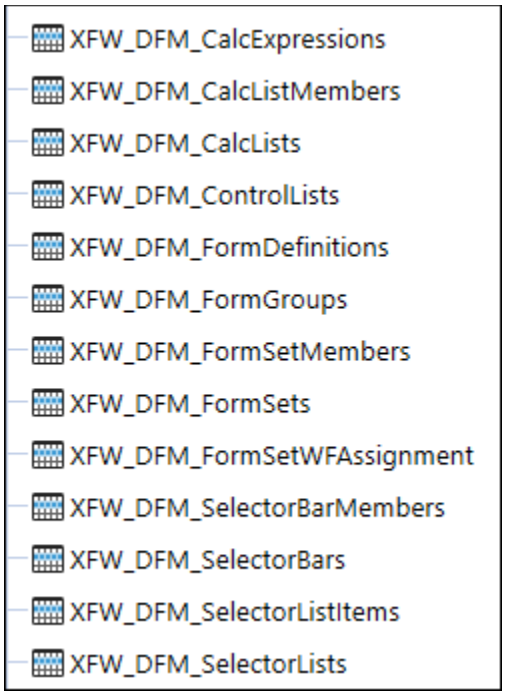
In OneStream XF, click **OnePlace** > **Dashboards Data Entry 123 (DFM)** > **Data Entry 123 (DFM)**.




The first step of the setup creates all the tables required for Data Entry 123.

**Step 1:** 


This step may be necessary when upgrading even if tables are already present. Data Entry 123 will not drop any tables that already exist but will modify table structures and add any new ones if necessary.



**Step 2:**


When setup is complete, click Launch Solution to display the Data Entry 123 Home page.

## Dashboard Maintenance Unit

**XFW Data Entry 123**

The Dashboard Maintenance Unit provides the user interface for Data Entry 123 and includes the Dashboard Groups, Components, Data Adapters, Parameters and Files used to build the solution.

## Business Rules

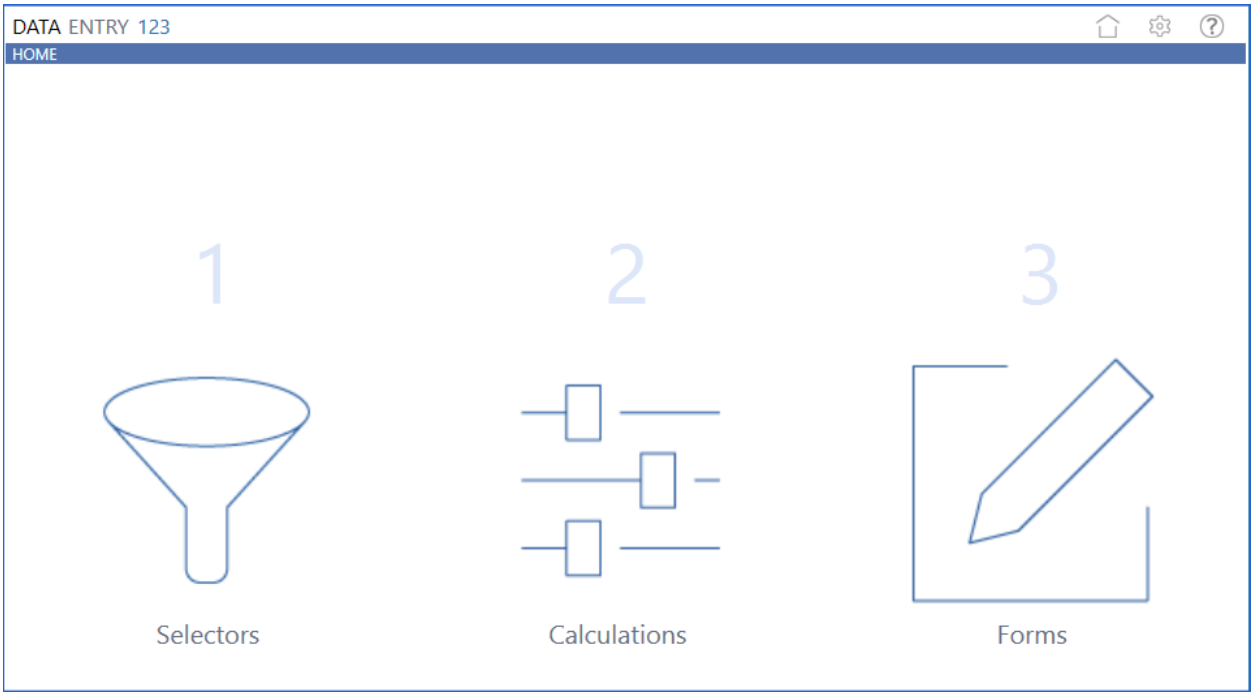
| Business Rule | Description |
|---|---|
| **DFM_CustomCalcs** | This is a Finance Business Rule. This rule allows the Form Manager to call custom calculations. |
| **DFM_SharedCalcs** | This is a Finance Business Rule. This rule contains shared calculations that can be used with a Standard Finance Business Rule/Member formula or from a custom calculation. |
| **DFM_HelperQueries** | Dashboard Dataset Business Rule that provides various data helper functions for populating charts, grids, and BI Viewer components. |
| **DFM_ParamHelper** | Dashboard XFBR String Business Rule that provides conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string. |
| **DFM_SolutionHelper** | Dashboard Extender Business Rule that provides various helper functions for addition, maintenance and navigation of selectors, calculations, and forms on the Main Dashboard. |

# HOME

The **Home** page contains Selectors, Calculations, and Forms.

Data Entry 123 is grouped into three sections:

1. **Selectors** consist of *Selector Lists*, or dropdowns, that are displayed across a *Selector Bar in a Form.*
2. **Calculations** consist of *Expressions* and *Business Rules* that are compiled into *Calculation Lists* that are applied to forms.
3. **Forms** can be displayed as a *CubeView, Dashboard*, or a *Spreadsheet* for data entry. *Forms* are compiled into *Form Groups* that are compiled into *Form Sets. Form Sets* are applied to *Workflow Assignments* which allows the underlying *Form Groups* and *Forms* to be associated with a specific *Workflow*.

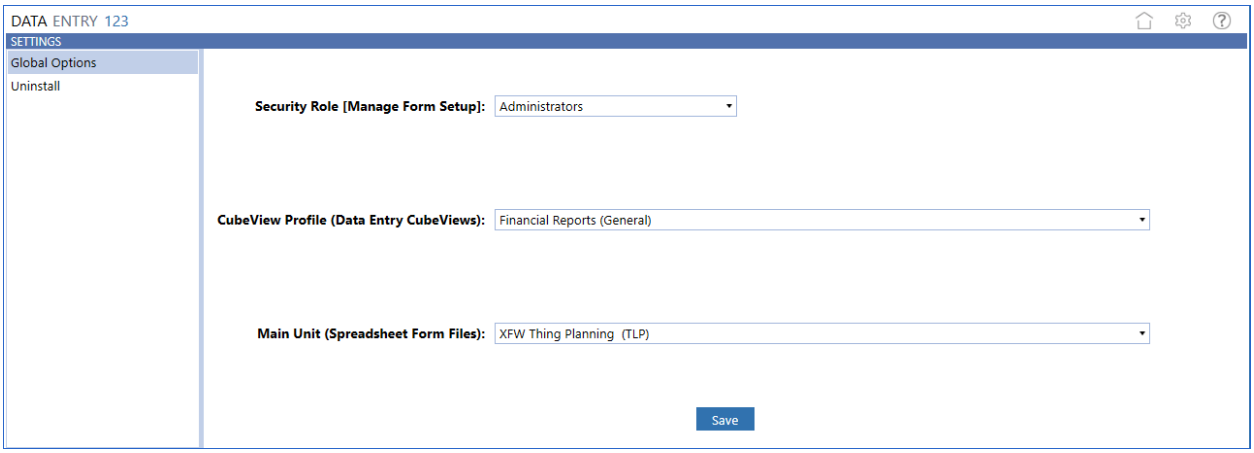


# SETTINGS

The **Settings** page contains the Global Options tab in which key properties that guide Data Entry 123 administration are set as well as Uninstall options. All global option settings are retained during solution upgrades.

## GLOBAL OPTIONS

The **Settings** > **Global Options** page should be one of the first pages visited when configuring Data Entry 123.




**Security Role [Manage Form Setup]**
Users in the User Group assigned to *Security Role [Manage Form Setup]* can manage all public Forms and access the Settings page. Default value is *Administrators* but this can be changed to a different User Group.

**CubeView Profile (Data Entry CubeViews)**
This setting assigns the Cube View Profile where the Cube Views are located for assignment to Form Definitions for data entry.

**Main Unit (Spreadsheet Form Files)**
This setting assigns the Dashboard Maintenance Unit where the Spreadsheet files are located for assignment to Form Definitions for data entry.

## UNINSTALL OPTIONS

**Uninstall UI** removes Data Entry 123, including related dashboards and business rules but leaves the database and related tables in place. Use this option if you want to accept a Data Entry 123 update without removing the data tables. The Data Entry 123 Release Notes will indicate if an overinstall is supported.

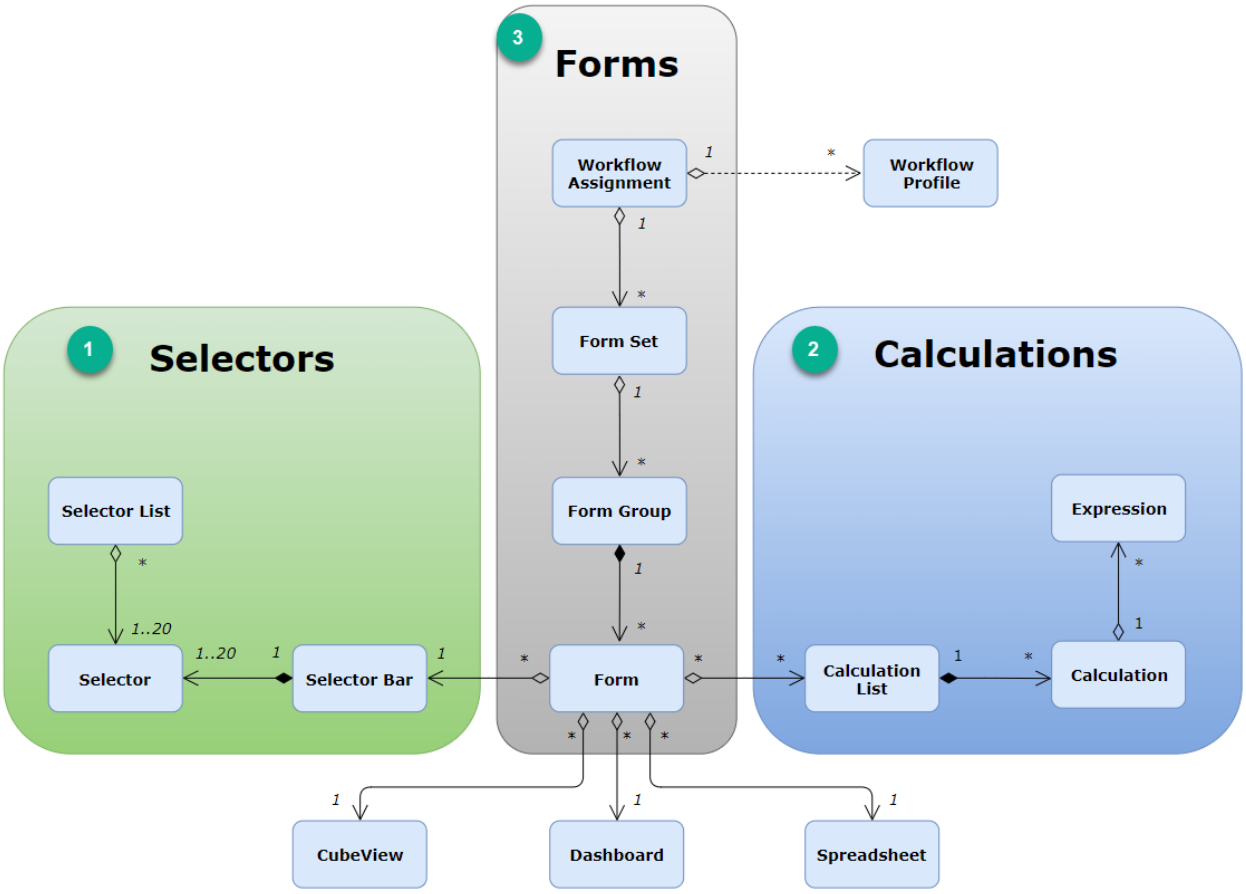
For some releases, this step should be performed before accepting any new version of Data Entry 123 since some of the Dashboard or other objects may have been renamed. Note that some Global Options will also be cleared as their values are stored in Parameters under Dashboards.

**Uninstall Full** removes all the related data tables, all data, Data Entry 123 Dashboards, and Business Rules. Use this method if you wish to completely remove Data Entry 123 or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

**WARNING: The Uninstall procedure cannot be reversed!**

# FRAMEWORK

The Data Entry 123 framework is broken into 3 main sections, all of which help to present CubeViews, Dashboards and Spreadsheets to users in a consistent manner.

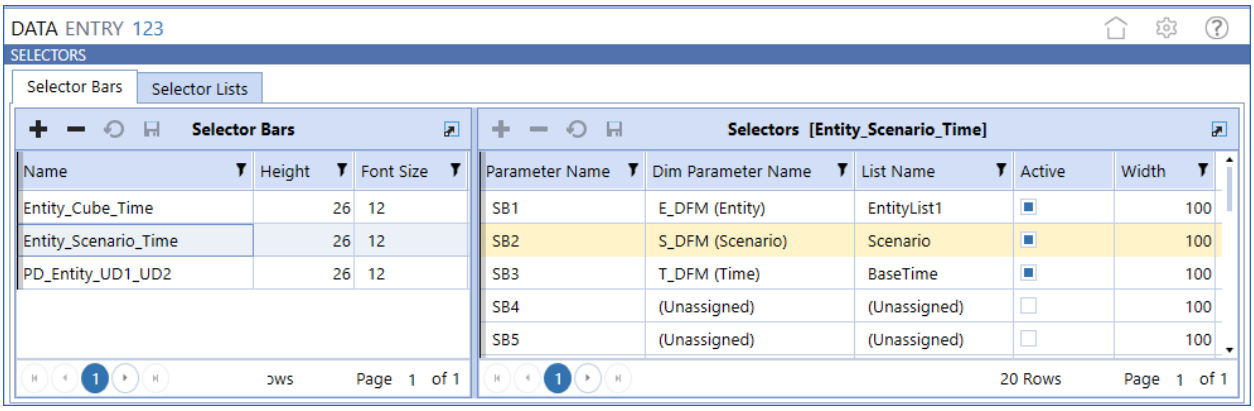


# SELECTORS

*Selectors* are made up of *Selector Bars* and *Selector Lists*. Combined they provide a library of items as drop downs on a form.

## Selector Bar

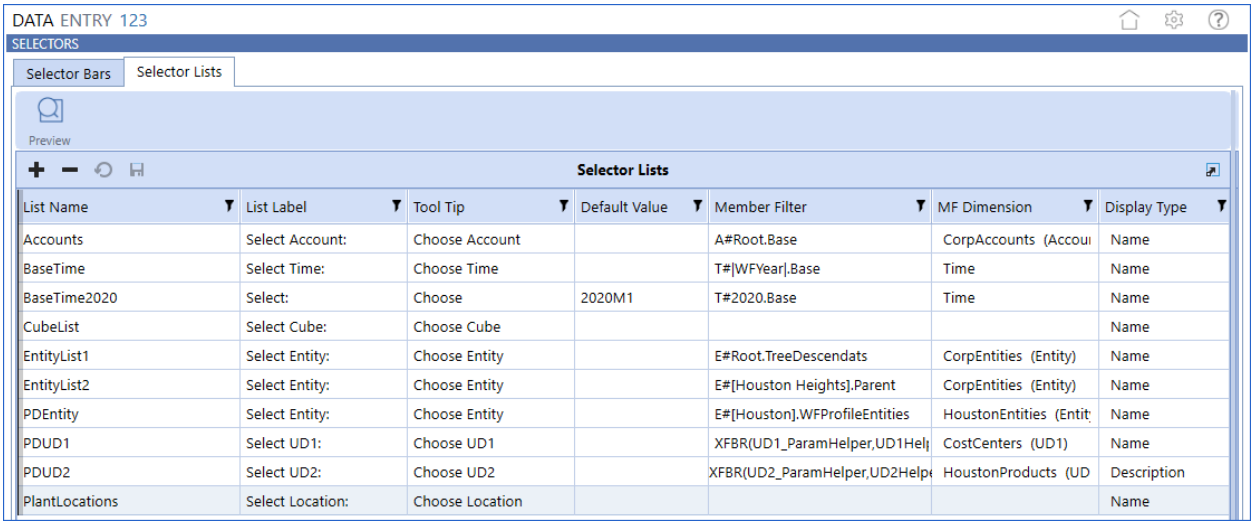
The *Selector Bars* are the item selectors on a form. Up to twenty selectors can be used within a selector bar.




| Option | Description |
|---|---|
| Name | The unique name of the *Selector Bar.* |
| Height | Specifies the height in pixels of all Selector Lists within the Selector Bar. |
| Font Size | Choose from available font sizes to adjust displayed values within all Selectors. |
| Parameter Name | The assigned parameter name to be used to store the parameter value from the specified column. |
| Dim Parameter Name | The assigned dimension of the parameter name. Duplicates are not allowed within each Selector Bar. |
| List Name | The name of the item *Selector List*. |
| Active | If the active box is checked the selector will be reflected in the form for that *Selector Bar.* |
| Width | Specifies the selector column width to be displayed on the form. |

## Selector Lists

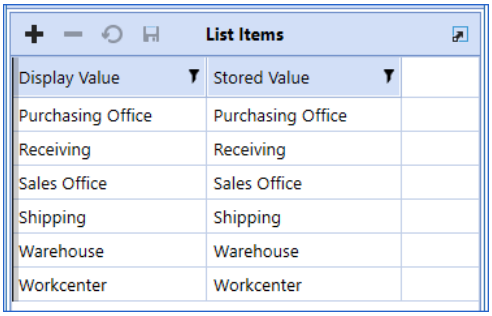
The *Selector Lists* tab is a list of items available for a *Selector on a Selector Bar.*




| Option | Description |
|---|---|
| Preview | Provides the ability to preview any selector list. |
| List Name | **T**he name of the selector list. |
| List Label | **T**he name that will be reflected in the form as the item selector list header. |
| Tool Tip | The text to be displayed when hovering over the selector list. |
| Default Value | This will be the default item selector that is presented to the user when accessing a form. If the default value is left blank then the default item selector will be the first item in the parameter list. |
| Member Filter | The area of the cube that is seen in the parameter. |
| MF Dimension | The dimension of the member filter. |
| Display Type | Determines how the items in the selector lists are displayed. The options are: name, description, name followed by description, or description followed by name. |
| SQL Statement | The SQL query used to provide the selector list items as an alternative to using a member filter. SQL commands; DROP, UPDATE, DELETE, TRUNCATE, and DBCC are not supported. |
| DB Location | The location of the database for the for the SQL statement to be applied against. The options are: Application, Framework or External. |
| Filter Criteria | This provides the ability to write a basic script to filter the selector list. *Ex. StoredValue Like 'H%'* |
| Sort Type | This provides a way to sort the selector list items by stored or display values as ascending or descending. |

## List Items

Use the list items to manually add values to *Selector Lists.* The values will appear in a *Selector List* along with any values that would be reflected from a *Member Filter* or *SQL Statement* query.

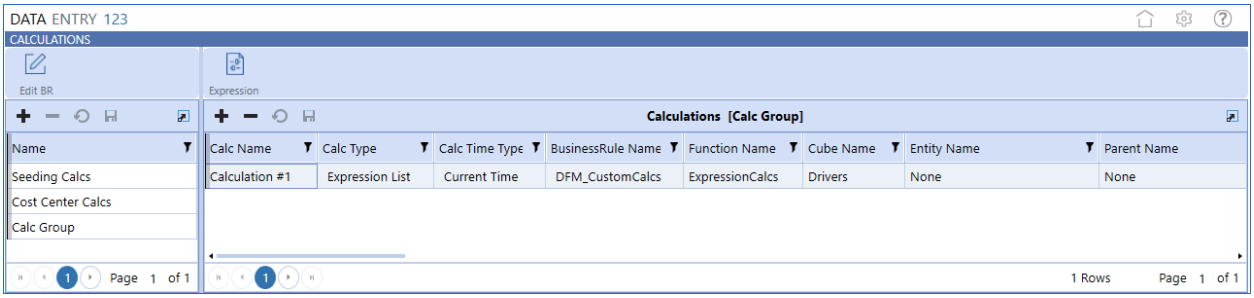



| Option | Description |
|---|---|
| Display Value | The item value displayed to the user in a *Selector List.* |
| Stored Value | The item value that is the value that would get applied in the parameter upon selection. |

## CALCULATIONS

This section is used to create *Expression* or *Business Rule* based calculations to be applied to the data set on a form.

### Calculation Lists and Calculations

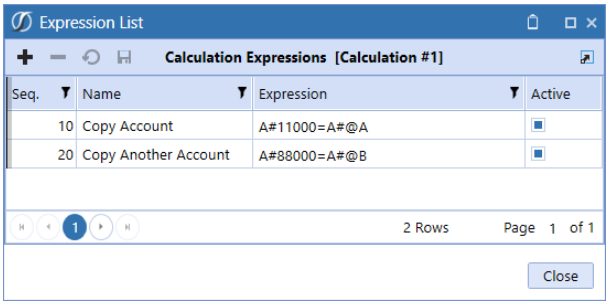



| Option | Description |
|---|---|
| Edit BR | Selecting this icon will open an *Application - Business Rules tab* where business rules can be viewed and edited. |
| Name | The name of the calculation list. |
| Calc Name | The name of the custom calculation. |
| Calc Type | The type of the calculation as either an Expression List or a BR Function. |
| BusinessRule Name | The name of the custom business rule. |
| Function Name | The name of the custom function in the selected *Business Rule*. |
| Cube Name | The name of the cube associated with this data source which will dictate the available dimensions that can be used. |
| Cube Dimension Names (Entity thru Custom 4) | The name of each dimension associated with the cube. |
| Access Group | This contains a list of all account access groups. Members assigned to the selected group will have access to run the calculation. |
| Execution Type | This determines how the calculation is executed. The options are: No Execute, Execute, Execute and Log, and Log Only. |

| | |
|---|---|
| Run On Open | Selecting this setting will run the calculation when the form is opened. |
| Run On Save | Selecting this setting will run the calculation when the form is saved. |
| Show In List | Selecting this setting will show the calculation in a list. |
| Sequence | Numeric value for ordering calculation executions. |

## Expression List

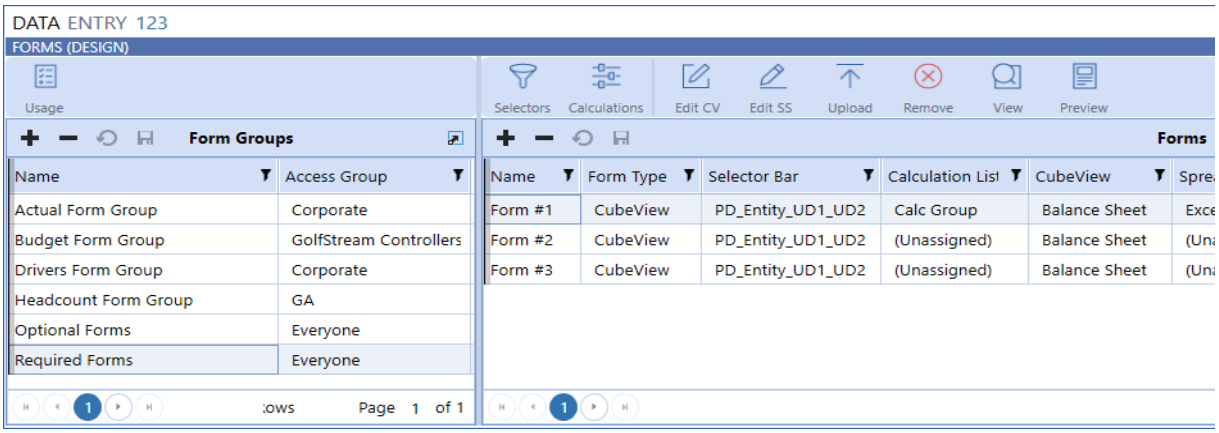
If *Expression List* is selected as the *Calc Type* then an expression icon will be present. Selecting this icon will present the *Expression List* dialog where the expression settings are maintained per calculation.




| Option | Description |
|---|---|
| Seq | The ordered series of one or more expressions which will execute in the order in which they are organized. |
| Name | The name of the expression. |
| Expression | The member script expression is stored in this field. |
| Active | If the active box is checked the expression will be executed as part of the calculation. |

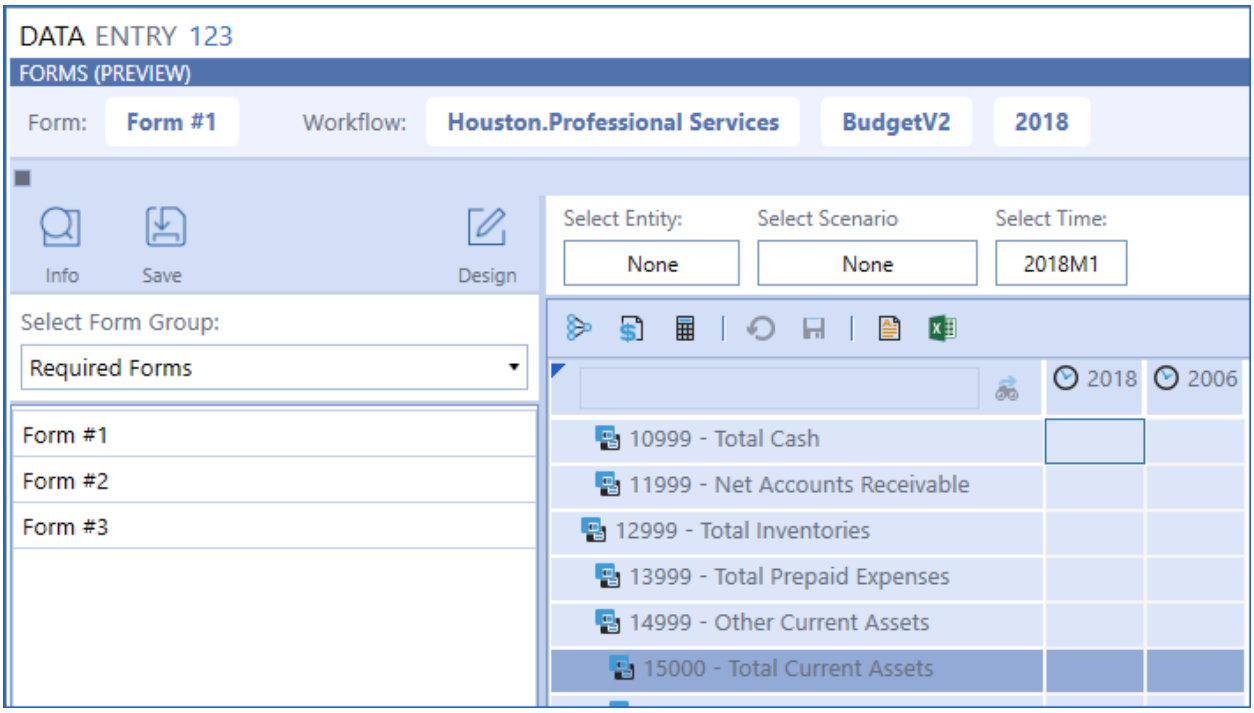
# FORMS

Forms can be used to allow manual data entry via a *CubeView*, *Dashboard* or *Spreadsheet*. One or many forms are assigned to *Form Groups* with *Selectors* and *Calculations.*




| Option | Description |
|---|---|
| Selectors | Select *Selectors* to view and edit the selector bars and selector list. |
| Calculations | Select *Calculations* to view and edit the form calculations. |

| | |
|---|---|
| Edit CV | Select *Edit CV* to view and edit the cube view associated with the selected form. |
| Edit SS | Select *Edit SS* to view and edit the spreadsheet associated with the selected form. |
| Reference Documents | Custom documents can be uploaded to accompany any form. All file types are supported except XML. |
| Upload | This provides the ability to upload and associate a reference document to a form. |
| Remove | This provides the ability to remove a reference document associated with a form. |
| View | This provides the ability to view a reference document associated with a form. |
| Preview | This provides the ability to view a form in a preview state. |
| Design | This provides the ability to navigate from preview back to the form design dashboard. |



## Form Groups

| Option | Description |
|---|---|
| Name | The name of the *Form Group*. |
| Access Group | This contains a list of all account access groups. Members assigned to the selected group will have access to the *Form Group*. |

## Forms (by Group)

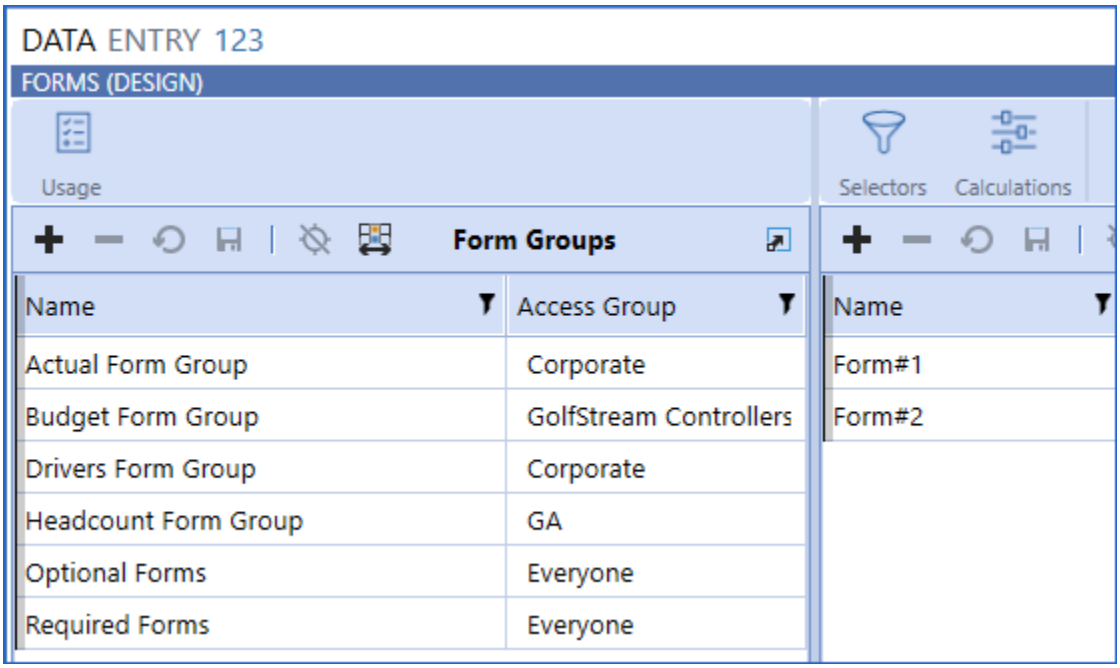
| Option | Description |
|---|---|
| Name | The name of the form in the group. |
| Form Type | The type of form that can be assigned as either a *Cube View, Dashboard*, or a *Spreadsheet*. |
| Selector Bar | A dropdown of available *Selector Bars* from the *Selectors* dashboard. |
| Calculation List | A dropdown of available *Calculation Lists* from the *Calculations* dashboard. |
| CubeView | The *CubeView* assigned to the form. The *CubeView* list is populated from the C*ubeView* profile setup in the *Data Entry 123 Settings - Global Options*. |
| Spreadsheet | The *Spreadsheet* assigned to the form.<br>If *Spreadsheet* is selected the Main Unit in *Data Entry 123 Settings - Global Options*, needs to be set to the *Dashboard Maintenance Unit* where the files are located. |

**Note:** The *Spreadsheet* feature is only available in the OneStream App for Windows. If any users would be accessing the assigned form in a browser then a *CubeView* should also be assigned to the form. The system will default to the *CubeView* assigned to the form in the cases where OneStream is used via a browser.

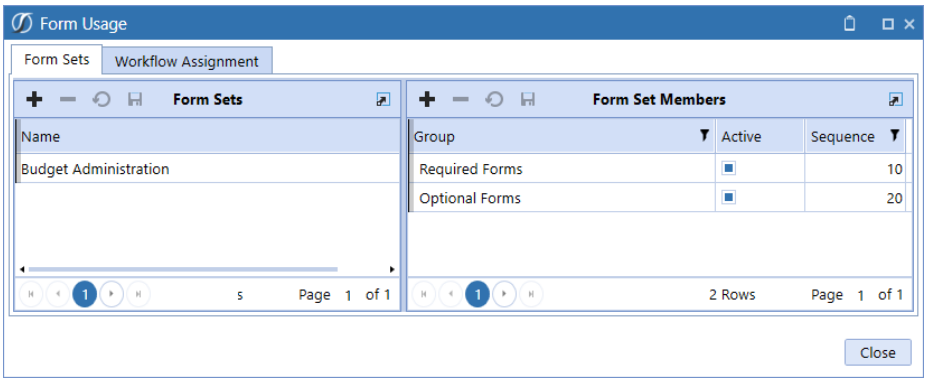
| | |
|---|---|
| Dashboard | The dashboard assigned to the form. |
| Reference Document | A reference document attached to the form. The reference document can be attached by selecting the Upload icon or detached from the form by selecting the Remove icon. |
| Active | If the active box is checked the form will be presented to users. |
| Sequence | Numeric value for ordering forms. |
| Access Group | This contains a list of all account access groups. Members assigned to the selected group will have access to the form. |

## Form Usage

Select the *Form Usage* icon to access *Form Sets* and *Workflow Assignment.* In this section *Form Groups* can be assigned to *Form Sets* which can then be assigned to workflows.




## Form Sets

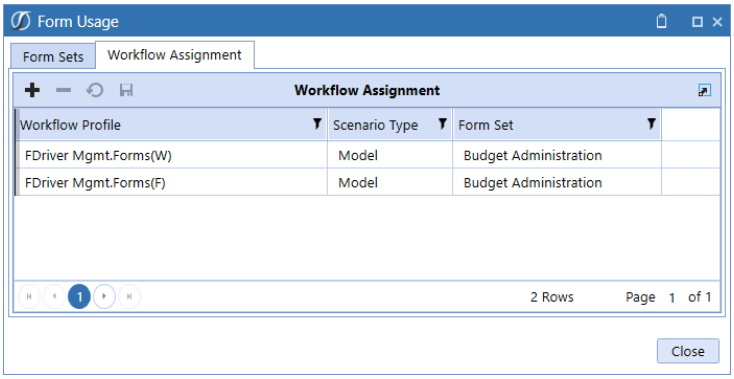



| Option | Description |
|---|---|
| Name | The name of the *Form Set.* |

## Form Set Members

| Option | Description |
|---|---|
| Group | The *Form Group* assigned as a member to the *Form Set*. |
| Active | If the active box is checked the ***Form Group*** will be presented to users. |
| Sequence | Numeric value for ordering form set members. |

## Workflow Assignment



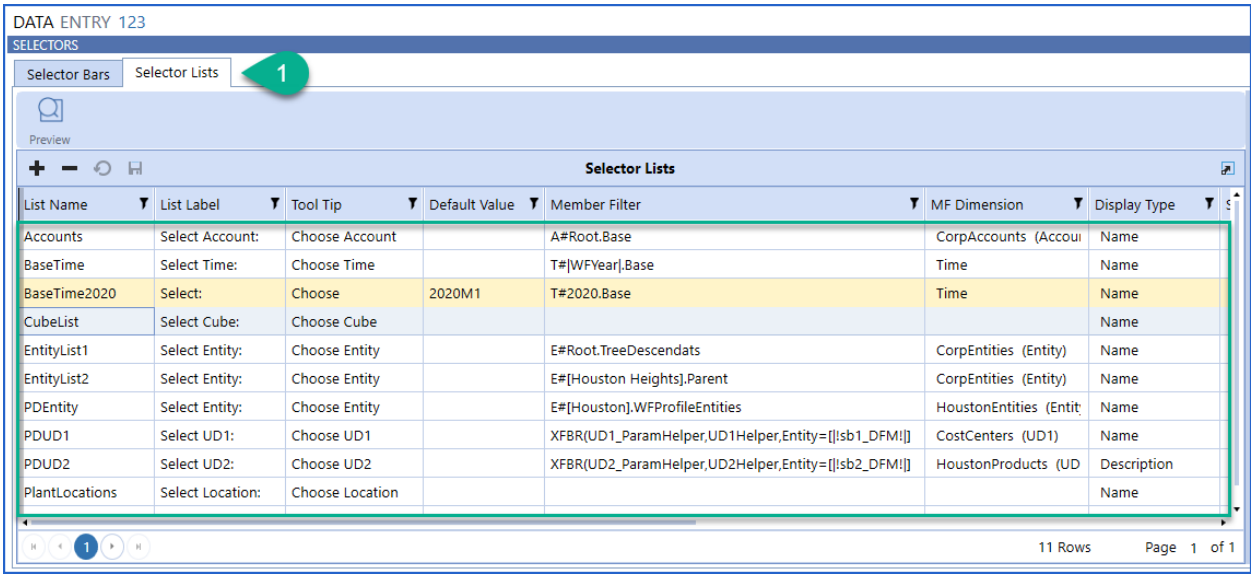

| Option | Description |
|---|---|
| Workflow Profile | The *Workflow Profile* that is assigned to the *Form Set*. |
| Scenario Type | The *Scenario Type* that is assigned to the *Form Set*. |
| Form Set | The *Form Set* that is assigned to the *Workflow*. |

# SETUP[SF1]

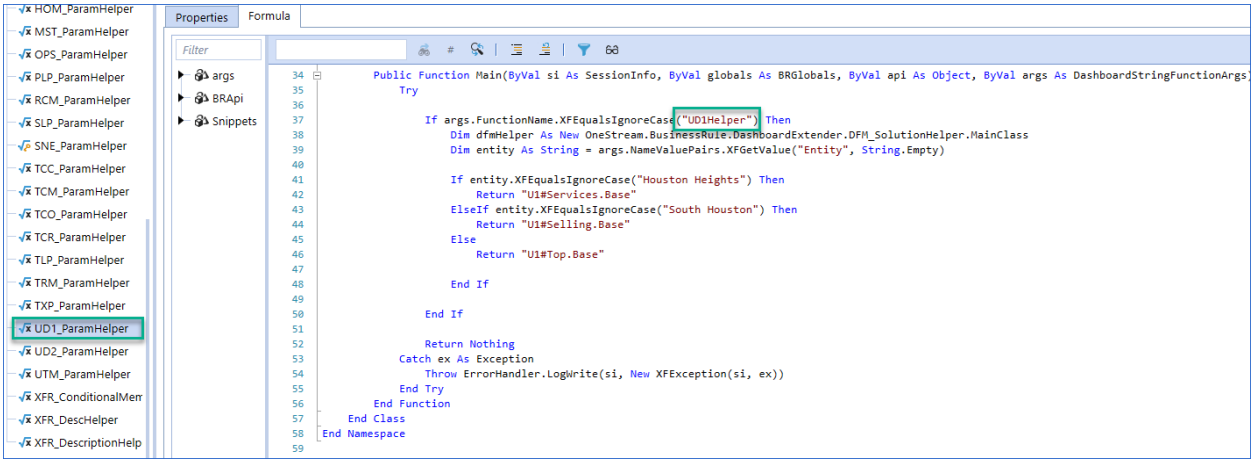
The following sections demonstrate how our 3 framework sections can be created for presenting an existing CubeView, Dashboard or Spreadsheet for data entry.

## SELECTOR SETUP STEPS

1. From the *Data Entry 123 Dashboard* home page select the *Selectors* icon and create the *Selector Lists.*

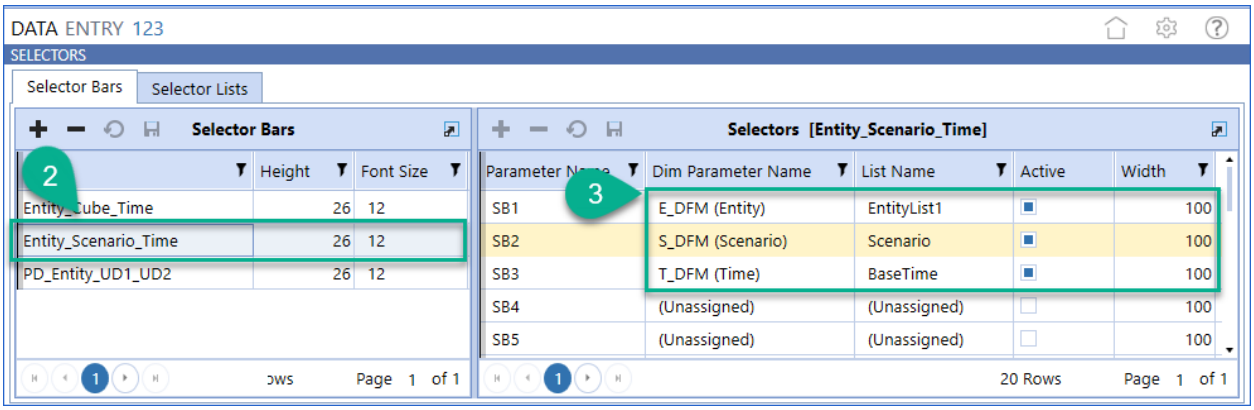



   a. Member Filters will reference an XFBR when the list of values displayed should be based from another filter selection. PDUD1 Member Filter calls the UD1_ParamHelper which references |!sb1_DFM!| which holds the value chosen by the user for PDEntity.



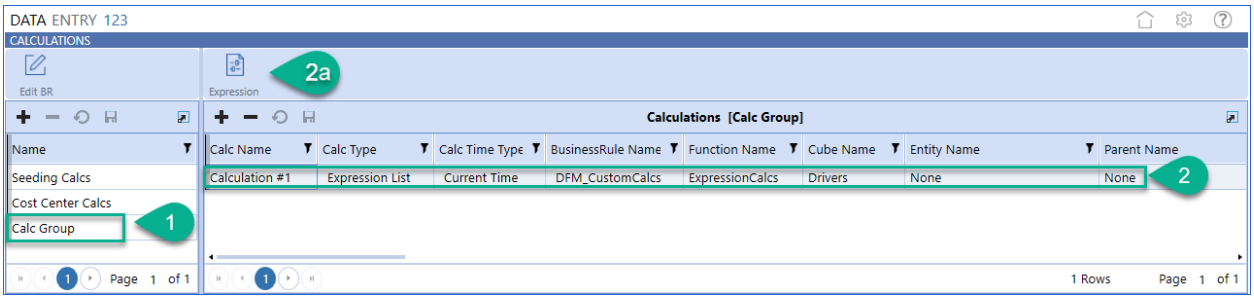
2. Create the *Selector Bars.*
3. Create the *Selectors* for the *Selector Bar* and by assigning a *Selector List* and a *Dim Parameter Name* to each *Selector*.

**Note:** The *Dim Parameter Name* is the Cube POV.



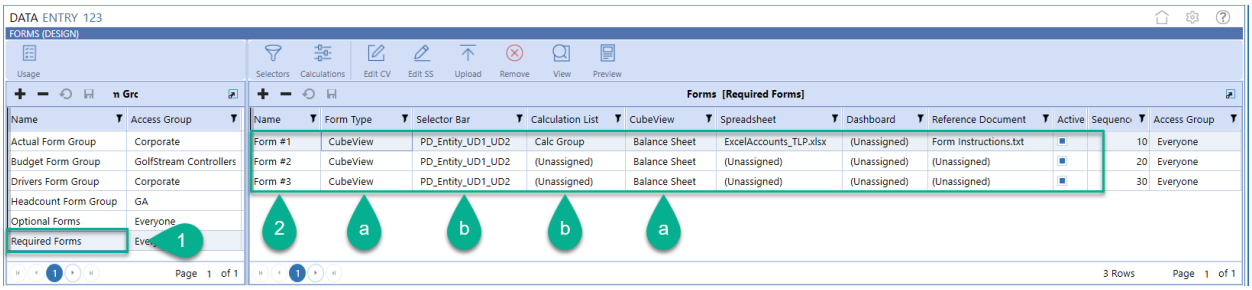

## Calculation Setup Steps

1. From the *Data Entry 123 Dashboard* home page select the *Calculations* icon and set the name of the *Calculation List*.
2. Create the *Calculations* as a *Business Rule* or an *Expression* calculation type.
    a. If an *Expression* type is selected, create the *Expression(s)* for the calculation.

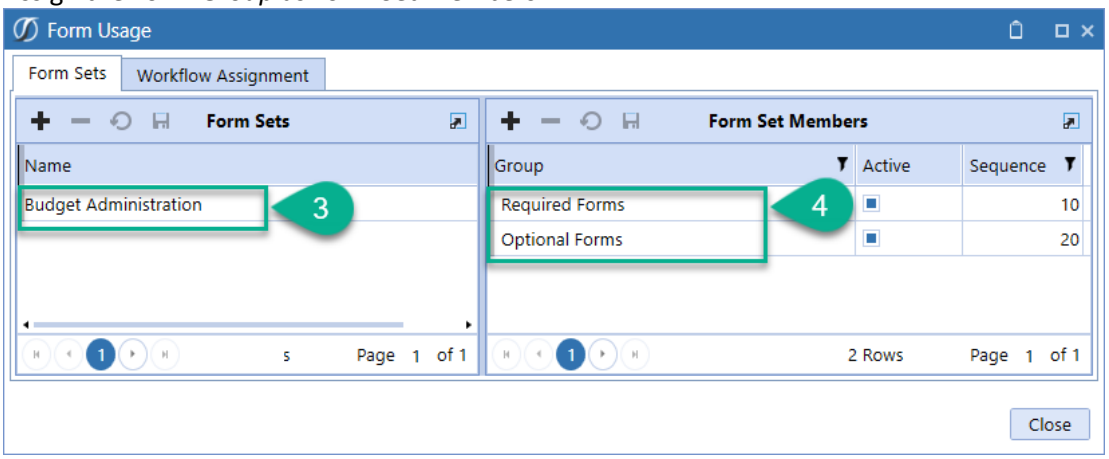


## Forms Setup Steps

1. From the *Data Entry 123 Dashboard* home page select the *Forms* icon and create a *Form Group.*
2. Create the form.
    a. Assign the form *CubeView*, *Dashboard* or *Spreadsheet.*
    b. Assign the *Selector Bar* and *Calculation List* to the form.



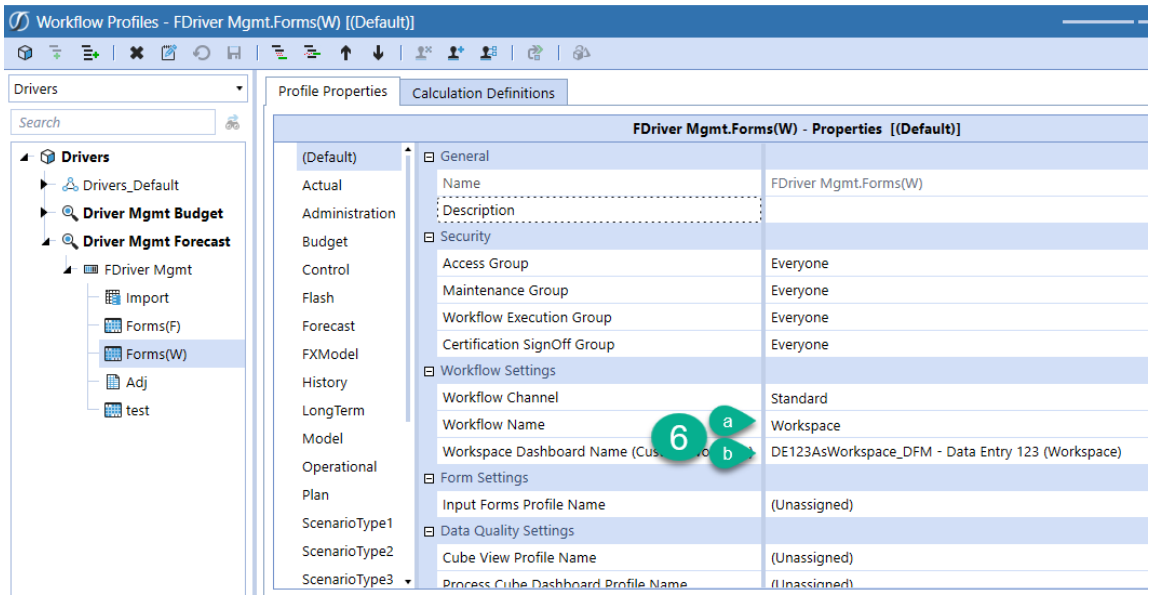

3. Select *Form Usage* and create the *Form Set.*
4. Assign the *Form Group* as *Form Set Members*.



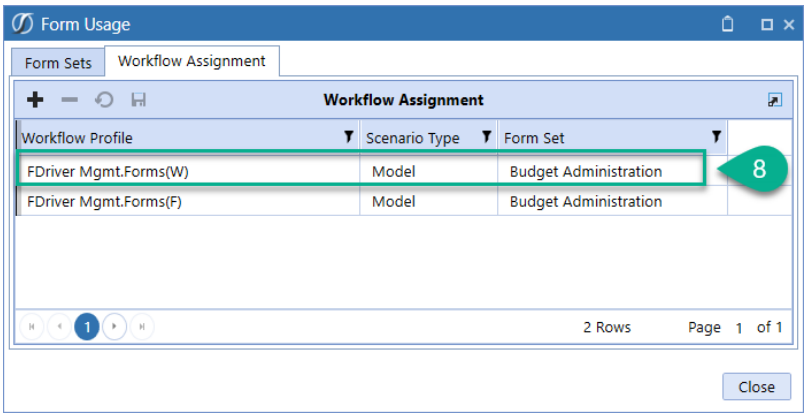

## Workspace Data Entry Setup

*Steps 5 through 8 provides the detail to setup the data entry from a Workspace. If the data entry is setup as Form Input, skip these steps and proceed to Step 9.*

5. Find the *Application* tab and select *Workflow Profiles.*
6. Create or access an existing *Workflow Profile.*
    a. Change the *Workflow Name* to **Workspace**
    b. For the *Workspace Dashboard Name* select **DE123AsWorkspace – Data Entry 123 (Workspace)** from the list of *Dashboards.*



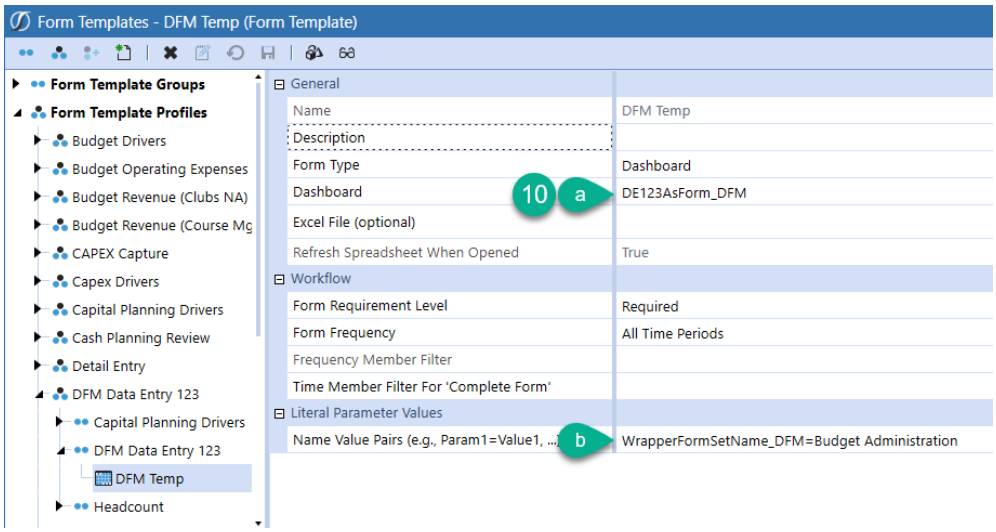

7. Navigate back to *Data Entry 123 select the Forms icon and then the Form Usage icon.*
8. On the *Workflow Assignments* tab.
    a. Select the *Workflow Profile* from *Step 6.*
    b. Select the *Scenario Type.*
    c. Assign the *Workflow Assignment* to the *Form Set* created in *Step 3*.



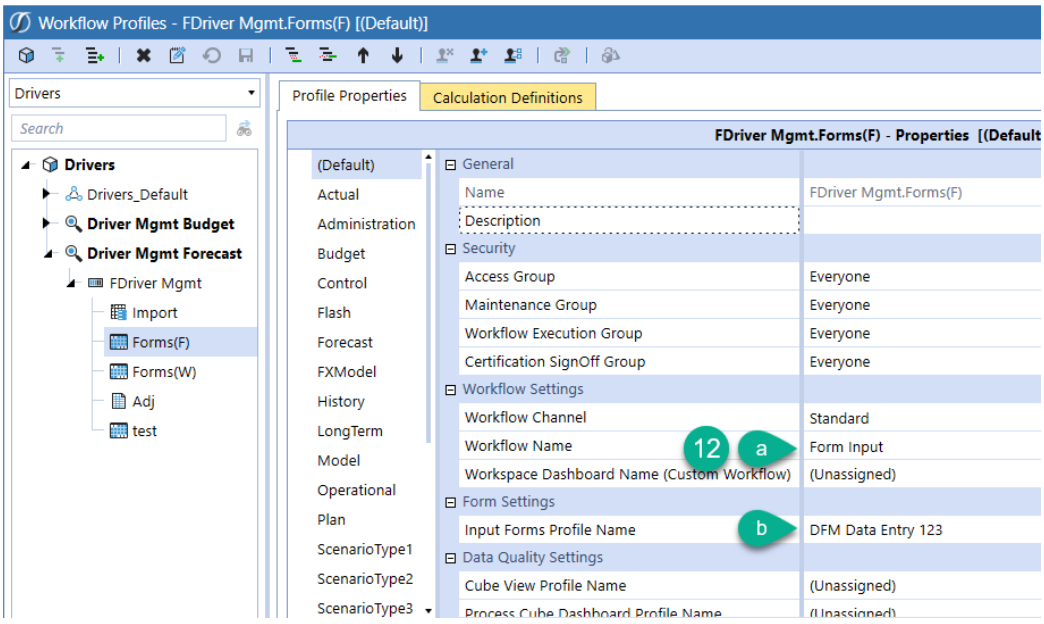

The *Workspace* has been setup for this *Form Group.*

## Form Input Data Entry Setup

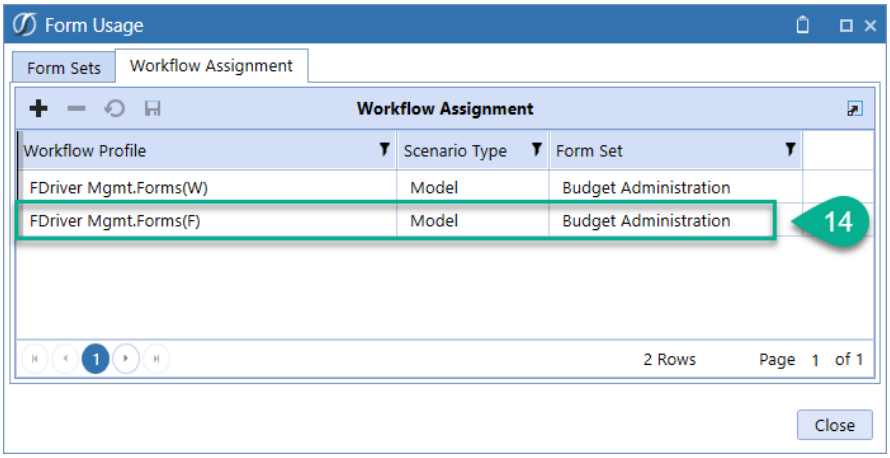
9. Navigate to *Application – Form Templates.*
10. Create a *Form Template.*
    a. Set **DE123AsForm_DFM** as the *Dashboard.*
    b. Set **WrapperFormSetName_DFM=**"*name of the Form Set created in Step 3*".




11. Navigate to *Application - Workflow Profiles.*
12. Create or access an existing *Workflow Profile.*
    a. Change the *Workflow Name* to **Form Input.**
    b. For the *Input Forms Profile Name* select the name of the template profile created in *Step 10.*



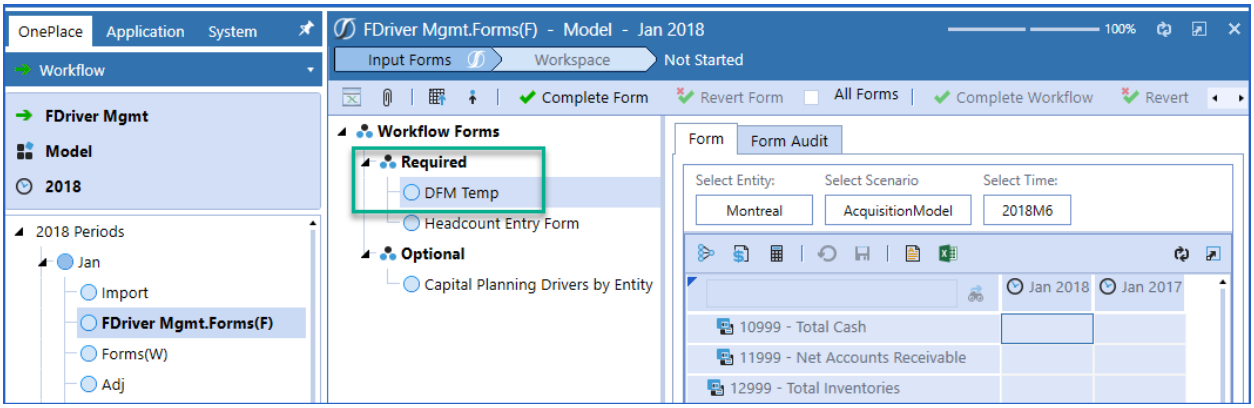

13. Navigate back to *Data Entry 123 select the Forms icon and then the Form Usage icon.*
14. On the *Workflow Assignments* tab.
    a. Select the *Workflow Profile* from *Step 12.*
    b. Select the *Scenario Type.*
    c. Assign the *Workflow Assignment* to the *Form Set* created in *Step 3*.



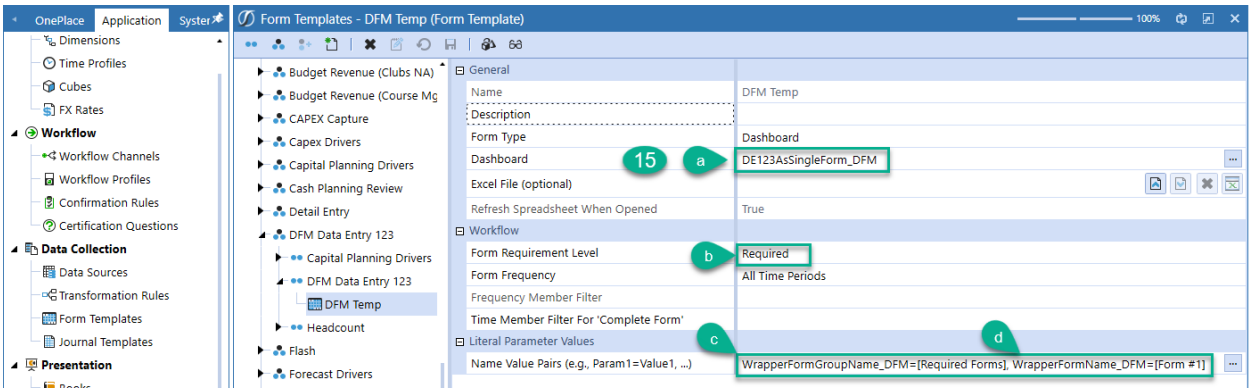

The *Form Input* has been setup for this *Form Group.*

## Required Form Input Data Entry Setup

Data Entry 123 created Forms can be designated as **Required** or **Optional** within Form Templates and then presented to the user within Workflow Profiles to record necessary data values.




15. Create a *Form Template.*
    a. Set **DE123AsSingleForm_DFM** as the *Dashboard.*
    b. Set *Form Requirement Level* as **Required**.
    c. Set **WrapperFormGroupName_DFM=[**"Form Group Name"]
    d. Set **WrapperFormName_DFM=[**"Form Name"]

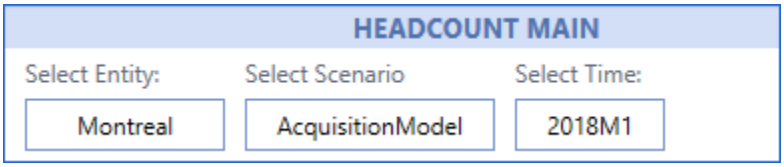


# EXAMPLES[SF2]

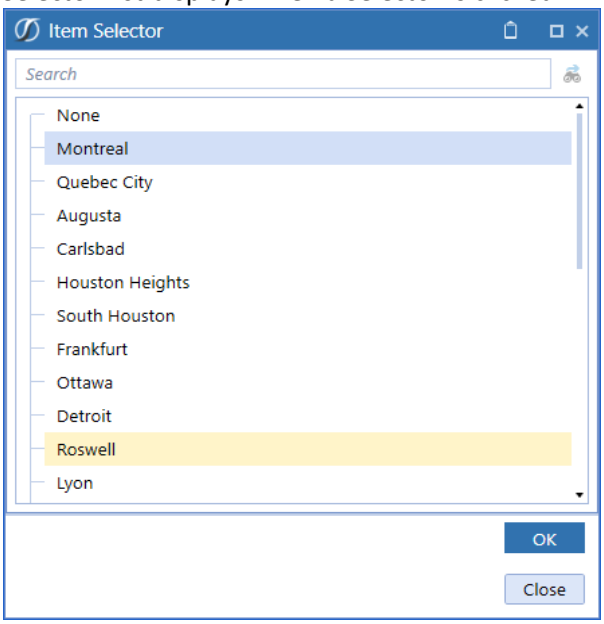
The following examples demonstrate how each of the 3 framework sections can be constructed.

## Selector Example

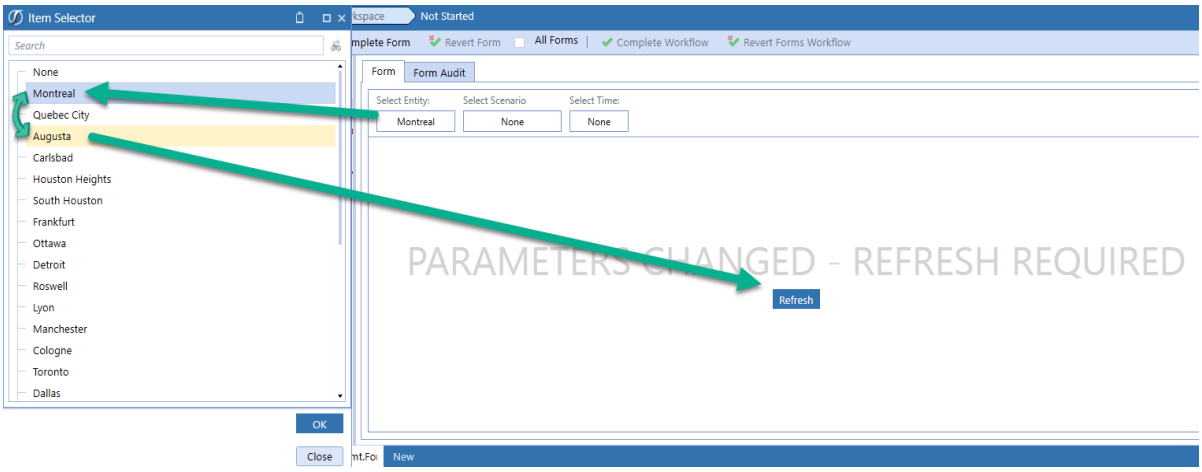
1. *Selector Bar* in a form with three *Selectors*.



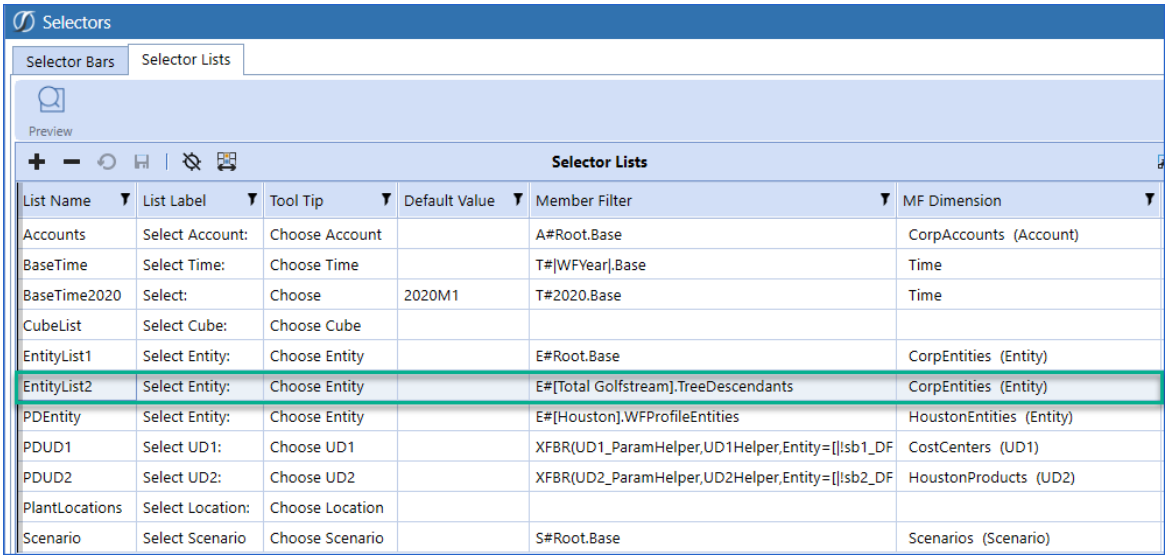

2. *Selector List* displays when a *Selector* is clicked.




3. Changing one Selector to another value displays the Refresh button.

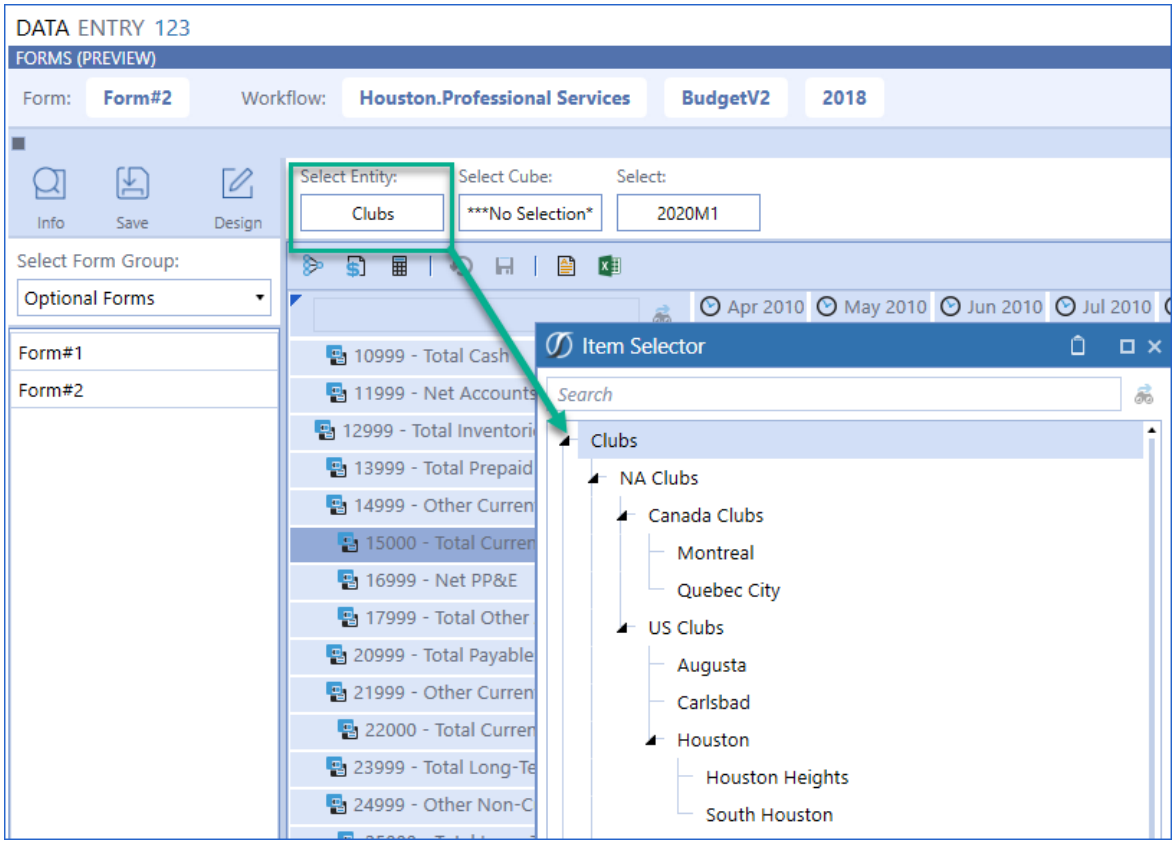


4. Members filters when designed properly will display values in the appropriate hierarchy.
   a. EntityList2 has been setup to display Tree Descendants for the Total Golfstream entity.



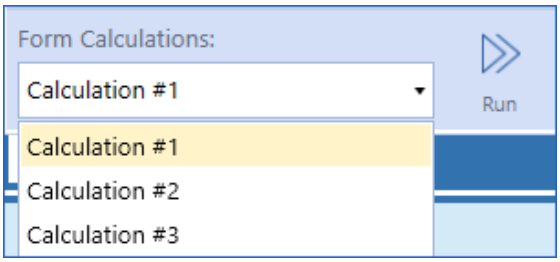

| List Name | List Label | Tool Tip | Default Value | Member Filter | MF Dimension |
|---|---|---|---|---|---|
| Accounts | Select Account: | Choose Account | | A#Root.Base | CorpAccounts (Account) |
| BaseTime | Select Time: | Choose Time | | T#\|WFYear\|.Base | Time |
| BaseTime2020 | Select: | Choose | 2020M1 | T#2020.Base | Time |
| CubeList | Select Cube: | Choose Cube | | | |
| EntityList1 | Select Entity: | Choose Entity | | E#Root.Base | CorpEntities (Entity) |
| EntityList2 | Select Entity: | Choose Entity | | E#[Total Golfstream].TreeDescendants | CorpEntities (Entity) |
| PDEntity | Select Entity: | Choose Entity | | E#[Houston].WFProfileEntities | HoustonEntities (Entity) |
| PDUD1 | Select UD1: | Choose UD1 | | XFBR(UD1_ParamHelper,UD1Helper,Entity=[\|!sb1_DF | CostCenters (UD1) |
| PDUD2 | Select UD2: | Choose UD2 | | XFBR(UD2_ParamHelper,UD2Helper,Entity=[\|!sb2_DF | HoustonProducts (UD2) |
| PlantLocations | Select Location: | Choose Location | | | |
| Scenario | Select Scenario | Choose Scenario | | S#Root.Base | Scenarios (Scenario) |

   b. EntityList2 has been assigned to Form#2. When selected the values are represented in proper hierarchy.



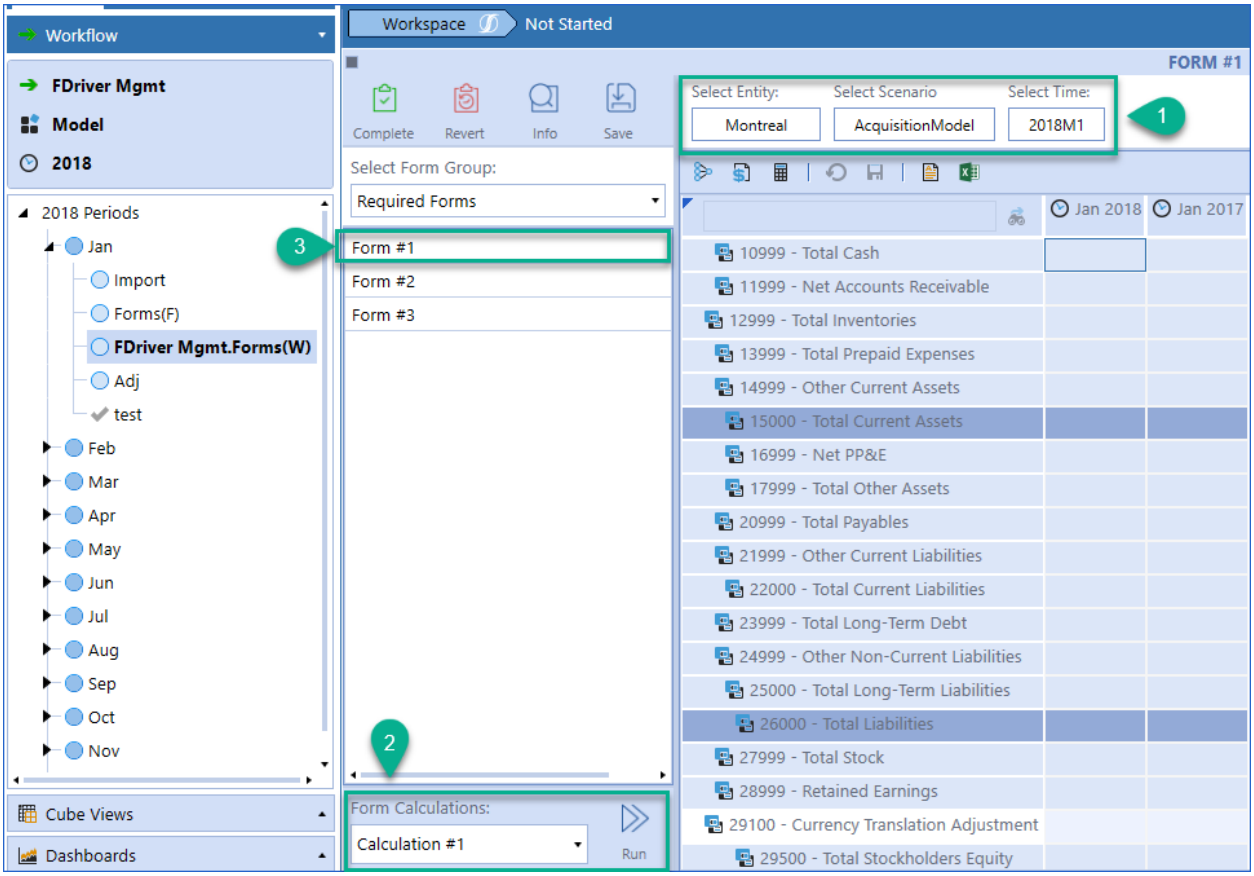
## Calculation Example

- A *Calculation List* with three *Calculations* on a form.




## Workspace Example Built

Completed Workspace built from a CubeView with multiple Forms, Selectors and Calculations.




1. A *Selector Bar* with *Selectors* and *Selector Lists.*
2. A *Calculation List* with *Calculations* that can be executed against the data set on the form.
3. A *Form* selected from the *Form Group* as a *CubeView* type.

# Help & Miscellaneous Information

This page contains solution documentation.

## Optimal Display Settings

OneStream XF and XF 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.

## 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.

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