



# Snippet Editor Setup Instructions

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PV620 SV100

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# Overview

The Snippet Editor solution lets you create and edit sample OneStream snippets. Snippets provide pre-tested code samples, making it easier to write high quality scripts in OneStream in a shorter amount of time.

Hundreds of sample snippets are included and ready to be imported into any OneStream server instance. There are several categories of snippet samples, including:

- Formulas
- Calculations
- Lists
- Data flows
- Rules
- Helpers
- Mappings

# Setup & 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" on page 19

## Dependencies

Component	Description
OneStream 6.2.0 or later	Minimum OneStream Platform version required to install this version of Snippet Editor.

Experience is required to write VB.NET code snippets in OneStream and in the Snippet Editor. Refer to Microsoft VB.NET reference documentation for more information on writing snippets.

## Select the Snippet Editor Development Location

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

**Production OneStream Application:** The primary advantage of building the solution in a Production application is that you will not have to migrate the resulting work from a Development application. However, there are intrinsic risks when making design changes to an application used in a Production capacity and not advised.

**NOTE:** OneStream strongly recommends that you implement the solution in the Development environment with a fresh copy of the Production application before starting work.

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

# Create the OneStream Development Application

1. Ensure all OneStream artifacts relating to Snippet Editor 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 Snippet Editor 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" on page 17

## Configure the OneStream Application Server

Be sure that the security group settings include the users who work on and set up the solution before proceeding.

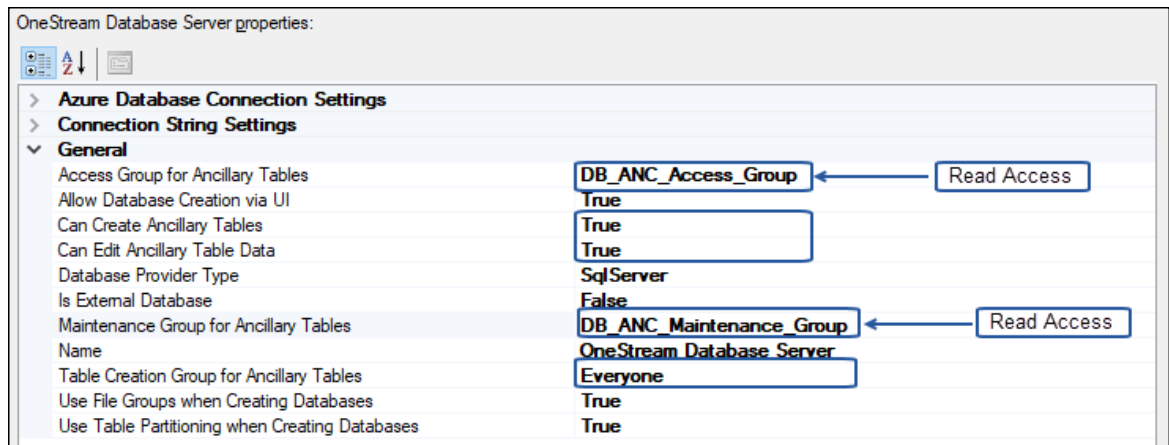
**NOTE:** Group settings are applicable to all MarketPlace solutions; it is important to keep the group names generic.

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 to edit and maintain tables.

## Setup & Installation

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- **Table Creation Group for Ancillary Tables:** Select a group who can create tables.



4. Restart Internet Information Server.

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See also: "Solution Database Migration Advice" on page 17

## Configure the OneStream Application Server

Be sure that the security group settings include the users who work on and set up the solution before proceeding.

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

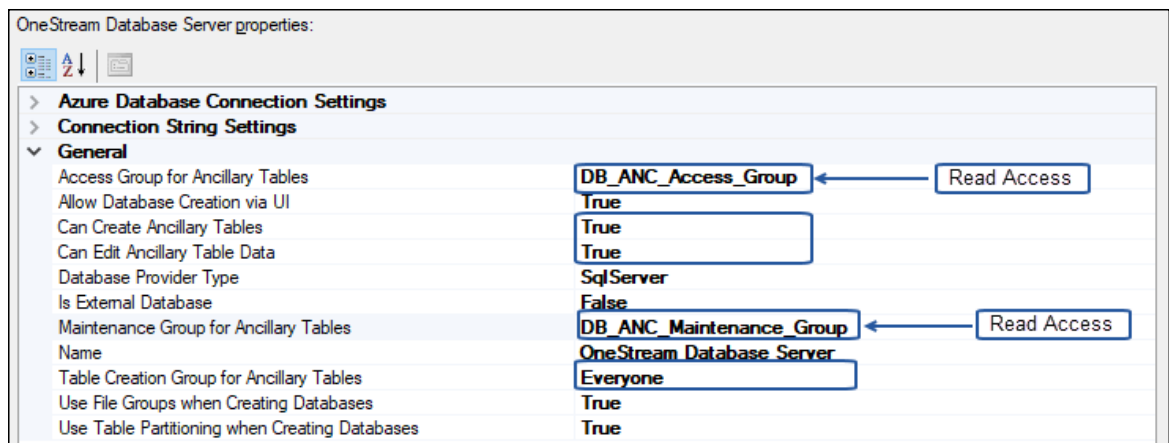
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- **Access Group for Ancillary Tables:** Select a group that includes those who will access records.
- **Can Create Ancillary Tables:** True
- **Can Edit Ancillary Table Data:** True
- **Maintenance Group for Ancillary Tables:** Select a group to edit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



4. Restart Internet Information Server.

# Install Snippet Editor

1. On the OneStream MarketPlace Dashboard, click **MarketPlace > Snippet Editor**.

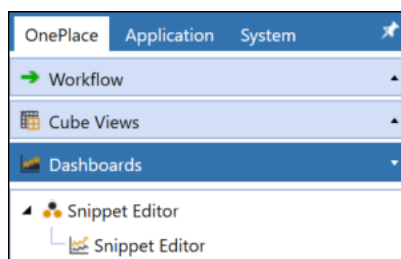


2. On the Snippet Editor Solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
3. Select the most recent version from the **Solution Version** drop-down list and then click **Download**.
4. Log in to OneStream.
5. On the **Application**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

# Set Up Snippet Editor

The first time you run Snippet Editor, you are guided through the table setup process.

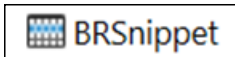
- In OneStream, click **OnePlace > Dashboards > Snippet Editor > Snippet Editor**.



# Create Tables and Launch Solution

1. Click **Step 1: Create Tables**.

This step may be necessary when upgrading even if tables already exist. Snippet Editor does not drop existing tables but modifies table structures and will add new ones if necessary.



2. When setup is complete, click **Step 2: Launch Solution** to open Snippet Editor.

## Package Contents

The Dashboard Maintenance Unit provides the user interface for Snippet Editor and includes the required Dashboard Groups, Components, Data Adapters, Parameters, and files.

**Business Rules:** The following Business Rules are included:

### **SNE\_HelperQueries**

Dashboard dataset Business Rule that can look up lists of snippets and snippet categories.

### **SNE\_SolutionHelper**

Dashboard extender Business Rule that allows for the addition, maintenance and navigation of snippets on the main dashboard.

### **SNE\_ParamHelper**

Dashboard XFBR string Business Rule provides conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

# Settings



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

## Global Options

The **Global Options** page should be the first page accessed during the initial setup and configuration of Snippet Editor.

**NOTE:** All global option settings are retained during solution upgrades



## Default Author

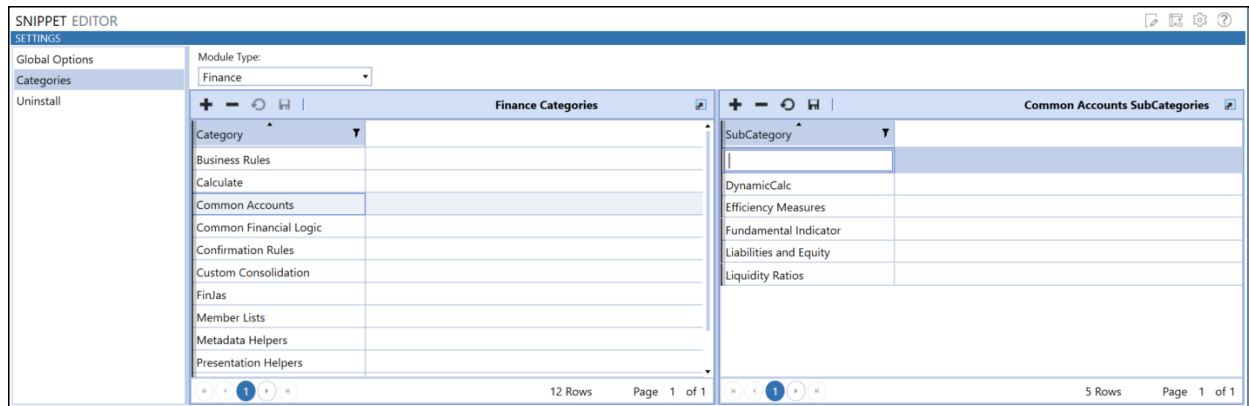
The Default Author is automatically assigned to a new snippet. This freeform text field displays in the Author field of Snippet Editor grids.

You can change an individual snippet author's name on the Editor page.

## Categories

Organize your snippets by creating categories and sub-categories. Categories and sub-categories align your snippets into logical groups for the current module type and let you customize their display in Snippet Editor.

## Settings



The **Module Type** drop down contains a list of predefined snippet modules. Each module type is only available in specific areas of OneStream. Module types include:

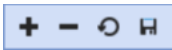
- General
- Finance
- Stage
- CubeView
- Dashboard
- Extender
- Event Handler

The following grid shows each module's availability in the Business Rules and other areas of OneStream.

Module	Business Rule Availability										Other		
	Finance	Parser	Connector	Conditional Rule	Derivative Rule	Cube View Extender	DB Data Set	DB Extender	XFBRString	Extensibility	Member Script	Cube Views	Conf Rules
Finance	Y										Y		Y
General	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Stage		Y	Y	Y	Y								
CubeView						Y						Y	
Dashboard							Y	Y	Y				
Extender										Y			
EventHandler										Y			

# Categories and SubCategories Button Bar

Use buttons in the Categories and SubCategories panes to add, delete, and save category and sub-category entries. All created categories and sub-categories appear in the Category and SubCategory drop-downs on the **Editor** page, which lets you filter the list of snippets on that page.



**See also:** [Editor](#)

**Insert Row** - Add a new category or sub-category.

**Delete Row(s)** - Select a category or sub-category in the Category or SubCategory pane, then click Delete in that pane to delete the item.

**Cancel** - removes changes made to categories and sub-categories since the last save.

**Save** - Saves updated task groups.

## Create Categories and SubCategories

The **Categories** page includes a **Categories** pane and a **SubCategories** pane, where you can build out the category and sub-category relationships for the current module type:

1. In the **Module Type** drop-down, select the module type for which you want to create categories and sub-categories.
2. Click the **Add** button in the **Categories** pane to create a new row, then click the Category column in the new row to edit its contents.
3. Enter the name of the category you want to add and click **Save**.
4. Click **Add** in the **SubCategories** pane to create a new sub-category row, then click the SubCategory column in the new row to edit its contents.
5. Enter the name of the sub-category you want to add and click **Save**.
6. Repeat steps 2 through 5 to add additional categories and sub-categories.

# Uninstall

The Uninstall feature allows the Snippet Editor User Interface or the entire solution to be uninstalled.

Note that if part of an upgrade, any modifications performed on standard Snippet Editor objects will be removed. There are two Uninstall options:

1. **Uninstall UI** removes Snippet Editor, including related dashboards and Rules but leaves the database and related tables in place. For some releases, this step should be performed before accepting any new version of Snippet Editor since some of the Dashboards or other objects may have been modified.
  - **Choose this option** if you want to accept a Snippet Editor update without removing the data tables.
  - The Snippet Editor Release Notes will indicate if an overinstall is supported.
2. **Uninstall Full** removes all the related data tables, all data, Snippet Editor Dashboards, and Business Rules.
  - **Choose this option** to completely remove Snippet Editor or to perform an upgrade that is so significant in its changes to the data tables that this method is required.

# Editor



Once you create categories and sub-categories, use the Editor page to create and edit snippets. You also use this page to download a Microsoft Excel template and create snippet information to import back into the Snippet Editor.




SNIPPET EDITOR				
EDITOR				
Module Type: Finance	Category: Common Accounts	SubCategory: Efficiency Measures	Refresh	Import Download
Snippets				
Name	Description	Author	Search Terms	Content
Asset Turnover	Efficiency Measure: The Asset Turnover ratio is an indicator of the e	OneStream	Account, Asset Turnover	'Calculate Asset Turnover 'Formula: Sales / Inventory  Return api.Data.GetDataCell("Divide(A#[YourSaleAccount], A#[YourInventoryAccount])")
Average Collection Period	Efficiency Measure: The approximate amount of time it takes for a 365/ Receivables Turnover	OneStream	Account, Average Collectio	'Calculate Average Collection Period 'Formula: Accounts Receivable/ (Annual Credit Sales/ 365) or 365/ Receivables Turnover  Return api.Data.GetDataCell("Divide(365, A#[YourReceivablesTurnoverAccount])")
Effective Tax Rate Percentage	Efficiency Measure: The net rate a taxpayer pays if all forms of taxes	OneStream	Account, Effective Tax Rate	'Calculate Effective Tax Rate (ETR) Percentage 'Formula: Income Tax Percent / Pretax Income  Return api.Data.GetDataCell("Divide(A#[YourIncomeTaxPercentAccount], A#[YourPretaxIncomeAccount])")
Gross Margin	Efficiency Measure: The gross margin represents the percent of tot	OneStream	Account, Gross Margin	'Calculate Gross Margin 'Formula: Gross Margin Pct = Gross Profit / Net Sales  Return api.Data.GetDataCell("Divide(A#[YourGrossProfitAccount], A#[YourNetSalesAccount])")
Inventory Period	Efficiency Measure: Inventory period is a measure of the average n 365/ Inventory Turnover	OneStream	Account, Inventory Period	'Calculate Inventory Period 'Formula: Average Inventory/ (Annual COGS/365) or 365/ Inventory Turnover  Return api.Data.GetDataCell("Divide(365, A#[YourInventoryTurnoverAccount])")
Inventory Turnover	Efficiency Measure: The Inventory turnover is a measure of the num	OneStream	Account, Inventory Turnov	'Calculate Inventory Turnover 'Formula: Cost of Goods Sold / Average Inventory  Return api.Data.GetDataCell("Divide(A#[YourCOGSAccount], A#[YourInventoryAccount]/#YearAvgToDate)")
Net Profit Percent	Efficiency Measure: It reveals the remaining profit after all costs of	OneStream	Account, Net Profit Percent	'Calculate Net Profit Percent 'Formula: Operating Profit/Sales or Operating Profit/Turnover  Return api.Data.GetDataCell("Divide(A#[YourOperatingProfitAccount], A#[YourSalesAccount])")
Operating Margin	Efficiency Measure: Operating margin is a measurement of what pr	OneStream	Account, Operating Margi	'Calculate Operating Margin 'Formula: Net Income / Net Sales  Return api.Data.GetDataCell("Divide(A#[YourNetIncomeAccount], A#[YourNetSalesAccount])")
Profit Margin	Efficiency Measure: The percentage of revenue remaining after all c	OneStream	Account, Net Profit Margin	'Calculate Net Profit Margin 'Formula: Net Profit Margin = Net Income / Net Sales  Return api.Data.GetDataCell("Divide(A#[YourNetIncomeAccount], A#[YourNetSalesAccount])")
Receivables Turnover	Efficiency Measure: The receivables turnover ratio is an activity rati	OneStream	Account, Receivables Turn	'Calculate Receivables Turnover 'Formula: Net Credit Sales/ Average Accounts Receivable  Return api.Data.GetDataCell("Divide(A#[YourNetCreditSalesAccount], A#[YourAccountReceivableAccount]/#YearAvgTo

Select the grouping (Module|Category|SubCategory) using the drop down lists. Once selected, click **Refresh** to display the snippets for the selected grouping. You can also add additional snippets directly in the snippet grid, or edit existing snippets.



# Snippet Editor Filters

Snippet Editor filters display on the **Snippet Editor** page. Use the drop-down lists to apply filters to see only specific snippets.

Module Type: Finance ▾	Category: Common Accounts ▾	SubCategory: Liabilities and Equity ▾	 Refresh	 Import	 Download
---------------------------	--------------------------------	--	---	--	--

### Module Type

These are the pre-defined module types in the system that categories and sub-categories are based. Select one of the module types from the list to display snippets created for that type. Module types are defined when Business Rules are created in OneStream.

**See also:** [Categories](#)

### Category

These are the categories for the selected module using the Categories page of the Snippet Editor settings. Use the list to select the category for which you want to view and create snippets.

**See also:** [Categories](#)

### SubCategory

These are the sub-categories you created for the selected module and category using the Categories page of the Snippet Editor settings. Use the list to select the sub-category within the selected category for which you want to view and edit snippets.

**See also:** [Categories](#)

# Snippet Editor Buttons

### Refresh

Refreshes the grid that displays snippet data. Click Refresh after selecting display criteria in the Module Type, Category, and SubCategory dropdowns to display snippet content matching the selection criteria.

### Import

Allows you to navigate to and select a Microsoft Excel file containing snippet data you want to import into OneStream Snippet Editor.

**See also:** [Import Snippet Data](#)

### Download

Allows you to download a Microsoft Excel template you can use to create or load snippet data from an external source.

**See also:** [Download Template](#)

# Import Snippet Data

OneStream provides a Microsoft Excel template you can use to create snippet data or load it from an external source, then import data back into OneStream. In the template on the **Snippet Template** tab, enter updates to or add new snippet data in the ranges between the blue lines. Insert additional rows within this range to allow for more snippet data.

The Module Type field in the template lets you select a predefined module type . When loading snippet data, each snippet's module type must match the module types in the list, otherwise an error occurs during import.

To manually enter snippet data in the template, start by selecting a valid module type from the dropdown. Then you can enter data in the rest of the fields to complete a snippet data record.

Module Type	Category	SubCategory	Name	Description	SearchTerms	Content
General	Business Rules	Data Helpers	Execute Query	Execute Query against Application Databases	Data, Query, Application, Database	'Define SQL Query Dim sql As New Text.StringBuilder sql.AppendLine("Select * From CustomTableName ") '<-- Define custom SQL query sql.AppendLine("Where Field1 = x ") '<-- Define custom SQL query sql.AppendLine("Order By FieldX") '<-- Define custom SQL query 'Define SQL Query
General	Business Rules	Data Helpers	Execute Query	Execute Query against External Database	Data, Query, External, Database	Dim connectionString As String = "Revenue Mgmt System" '<-- Enter name of predefined connection string (In App Server Config) Dim sql As New Text.StringBuilder sql.AppendLine("Select * From CustomTableName ") '<-- Enter your SQL query 'Define SQL Query
General	Business Rules	Data Helpers	Execute Query	Execute Query against Framework Databases	Data, Query, Framework, Database	Dim sql As New Text.StringBuilder sql.AppendLine("Select * From FrameworkTable ") '<-- Define custom SQL query sql.AppendLine("Where Field1 = x ") '<-- Define custom SQL query sql.AppendLine("Order By FieldX") '<-- Define custom SQL query
General	Business Rules	Data Helpers	Open Application	Open a connection to the Application database	Connect, Connection, Data, Open, Application	'Open connection to Application database Using dbConnApp As DBConnInfo = BRApi.Database.CreateApplicationDbConnInfo(si) End Using

After entering data in the template, save it and close the file before importing.

## Download Template

OneStream provides a Microsoft Excel template you can use to define your snippets. Once defined, you can import the snippet data into OneStream, where you can view and further edit them in the Snippet Editor. Use the **Snippet Template** tab in the template to enter updates to or add new snippet entries in the ranges between the blue lines. Insert additional rows within this range to allow for more snippet data.

After entering data in the template, save it and close the file before importing.

## Pivot



The Pivot page displays all snippets in a grid and has drag and drop capabilities which allow users to pivot on any field in the grid.

Use the Pivot page to see only the specific existing snippets you want to focus on. Drag a column to the blue row at the top of the grid to pivot on that field.

Pivot					
Drag a column header and drop it here to group by that column					
	Module Type ▼	Category ▼	SubCategory ▼	Name ▼	Description
▶	CubeView	Presentation Helpe	Reporting	Cube View Extender - Header and Footer	Prevent the Center Subtitle from wrapping b
	CubeView	Presentation Helpe	Reporting	Cube View Extender - Change Header Co	Control the header font, color, or backgroun
	CubeView	Presentation Helpe	Reporting	Cube View Extender - Footer style	Control the Footer style

# Help & Miscellaneous Information



This page contains additional solution documentation for the Snippet Editor.

## Display Settings

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

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

## Package Contents & Naming Conventions

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

**Example Package Name:** SNE\_PV6.2.0\_SV100\_PackageContents.zip

Identifier	Description
SNE	Solution ID
PV6.2.0	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*.

1. In the production OneStream application, install the solution and create the data tables. See "Configure the OneStream Application Server" on page 4 for Database Server Connection settings and installation details.
2. Data tables are created in the OneStream Development application during the solution installation. Using the [Microsoft Data Migration Assistant](#), copy the data from the tables to the Production Microsoft SQL Server Database. Only the Microsoft SQL Administrator should run the migration assistant.

**IMPORTANT:** This process has the potential to overwrite existing table data in the production application database if data already exists.

# Extract and Reload Table Data

All updates made in Snippet Editor are stored in the BRSnippet table in the framework. The data for the BRSnippet table can be extracted to an XML file, then loaded back into OneStream after migrating the database.

1. In OneStream, click **System > Tools > Load/Extract**.
2. Click the **Extract** tab, then select **Snippets** from the File Type drop-down. Snippet items to extract appear in the Items to Extract tree view. All snippets are selected for extraction by default.
3. Click **Extract**, then use the Windows Save As dialog box to navigate to and select the location to store the extract XML file.
4. Click **OK**.

Once the framework database is migrated, you can load the XML file back into OneStream.

1. In OneStream, click **System > Tools > Load/Extract**.
2. Click the **Load** tab, then click the ellipsis button in the File Name field.
3. Use the Windows **Open** dialog box to navigate to and select the location where you stored the extracted XML file.
4. Click **Open**, then click **Load** to load the snippet data back into OneStream.

A progress bar indicates when the load completes.

# MarketPlace Solution Modification Considerations

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

- Major changes to business rules or custom tables within a MarketPlace solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any dashboard object or business rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the MarketPlace solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.
- If modifications are made to a MarketPlace solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a dashboard do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.