Cloud Admin Tools Setup Instructions

PV520 SV101

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Overview

Cloud Administration Tools is a solution containing access to multiple cloud service functionalities, each enabling OneStream Cloud Administrators to perform their role with greater efficiency.

User Management Console

The User Management Console manages the relationship between users hosted in the Microsoft Azure Active Directory (Azure AD) and OneStream Framework. With this console, a system administrator can self-manage their Azure AD users within OneStream by inviting, creating, deleting (disabling) and importing users as well as resetting passwords.

> **NOTE:** User Management Console is only available with Azure AD hosted by OneStream Cloud Services and to members of the Administrator's Security Group.

Manage Applications

The Manage Applications manages OneStream applications in a cloud environment. System Administrators can copy existing applications to create new applications or replace existing applications within OneStream. With Manage Applications, Administrators can make changes for testing or archival purposes.

This functionality is only available to members of the administrator's security group.

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" on page 28

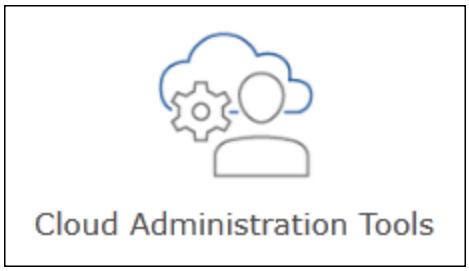
> **IMPORTANT:** If your environment's platform version is 5.1 or earlier and you use the User Management Console, the OneStream Cloud Support Team must perform all installation, setup, and configuration tasks. Contact OneStream Support for assistance. All others can install Cloud Administration Tools without assistance.

Dependencies

Component	Description
OneStream 5.2.0 or later	Minimum OneStream Platform version required to install this version of Cloud Administration Tools.

Install Cloud Administration Tools

1. On the OneStream MarketPlace Dashboard, click **MarketPlace** > **Cloud Administration Tools**.



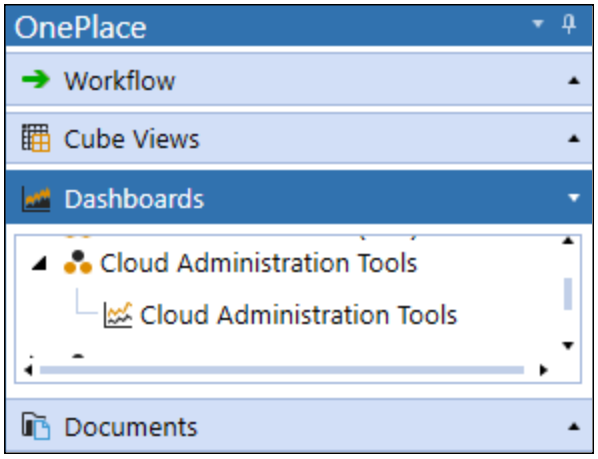
2. On the Cloud Administration Tools Solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.

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 Cloud Administration Tools

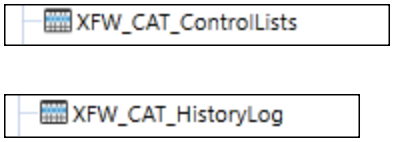
The first time Cloud Administration Tools is run, you are guided through the table setup process.

- In OneStream, click **OnePlace** > **Dashboards** > **Cloud Administration Tools** > **Cloud Administration Tools**.



Create Tables

1. Click **Step 1: Create Tables**.
   This step may be necessary when upgrading even if tables are already present. Cloud Administration Tools will not drop any tables that already exist but will modify table structures and add any new ones if necessary.



2. When setup is complete, click **Step 2: Launch Solution** to open Cloud Administration Tools.

Package Contents

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

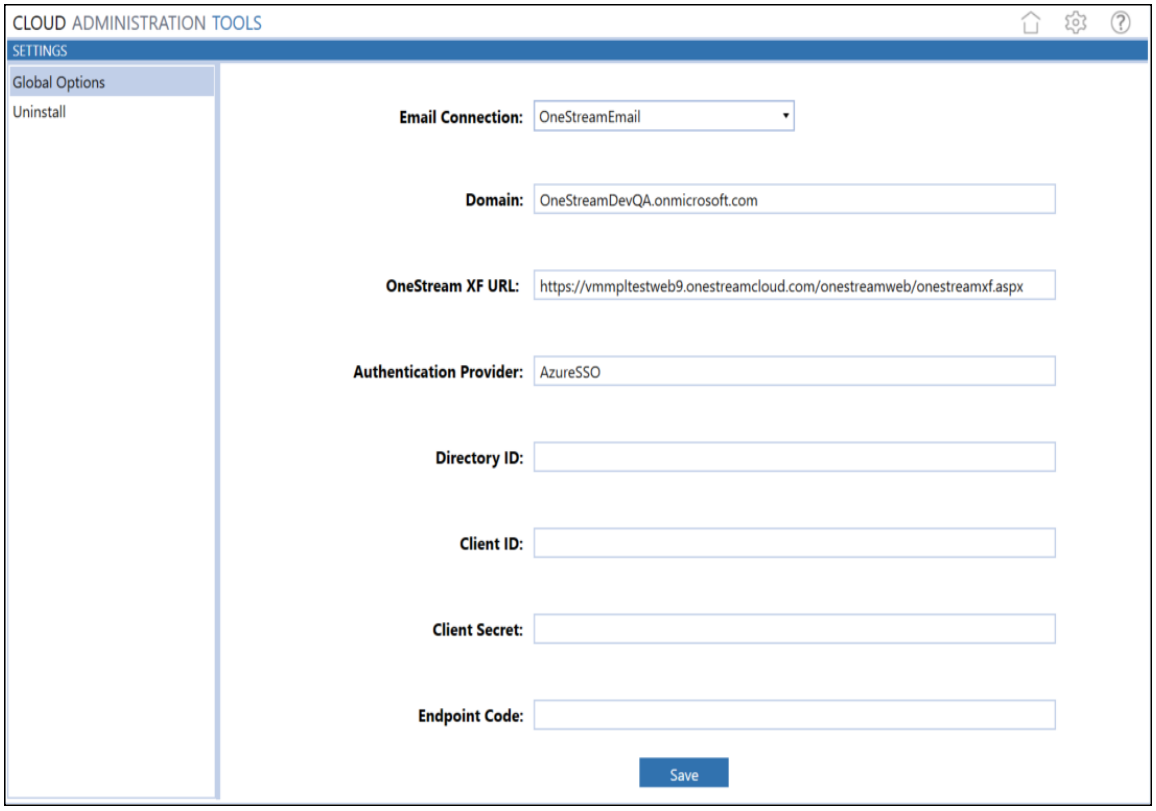
Settings

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

Global Options

The **Global Options** page contains key properties which guide global Cloud Administration Tools administration. The setup for this page will be set up by the OneStream Cloud Support Team.

NOTE: Once configured and saved, some Global Options are not visible. Only Cloud Support should configure these settings.



IMPORTANT: Do not modify these settings once they are configured by Cloud Support.

Email Connection

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

For more details on email database connections, see the *Installation and Configuration Guide*. This setting may be changed by the administrator if you want emails to come from a different email connection.

Domain

The Azure Active Directory domain name is `@mydomain.onestreamcloud.com` and should not be modified unless directed to do so by support.

OneStream URL

The Azure URL of the customer's environment is `https://xxxxxx.onestreamcloud.com/onestreamweb/onestreamxf.aspx` and should not be modified unless directed to do so by support.

Authentication Provider

The name of the Authentication Provider service for the OneStream Framework database in this server environment. Do not modify this setting unless directed to do so by support.

Directory ID

The Directory ID configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Client ID

The Client ID configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Client Secret

The Client Secret configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Endpoint Code

The Endpoint Code configured by the OneStream Cloud Services Team. This encrypted key is masked and will display as a blank entry after the initial setup. Do not modify this setting unless directed to do so by support.

Functionality Enabled

The Functionality Enabled setting allows the user to toggle the availability of which functionality is displayed on the Cloud Administration Tools home page. Do not modify this setting unless directed to do so by support.

Uninstall

Use the Uninstall feature to remove the Cloud Administration Tools User Interface or the entire solution. If part of an upgrade, any modifications performed on standard Administrator Solution Tools objects are removed. There are two uninstall options:

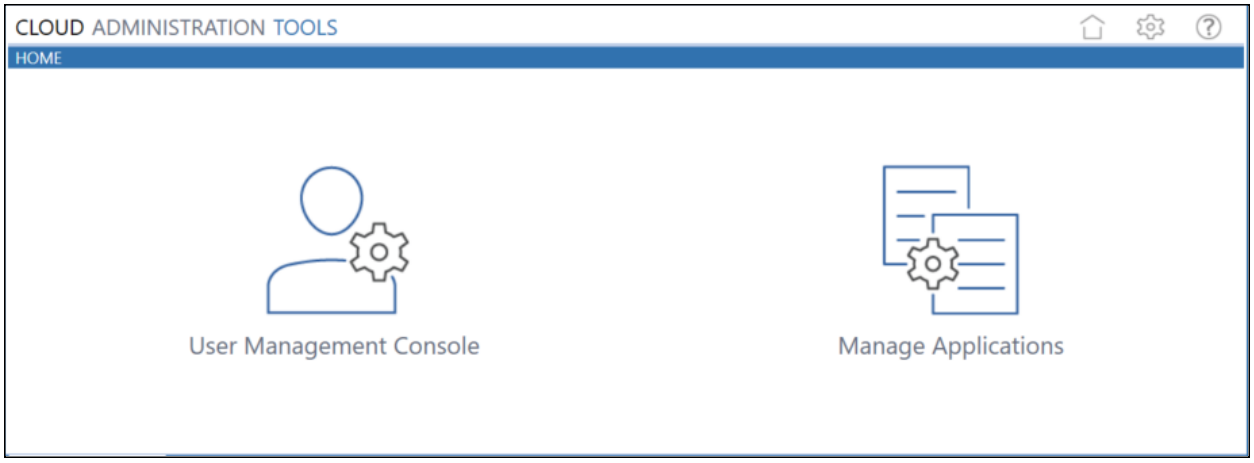
- **Uninstall UI** removes Administrator Solution Tools, including related dashboards and business rules but retains the database and related tables. For some releases, perform this step before accepting a new solution version as some of the dashboards or other objects may have changed. Choose this option to update Administrator Solution Tools without removing the data tables. The Release Notes indicate if an overinstall is supported.
- **Uninstall Full** removes all related data tables, data, and Administrator Solution Tools dashboards and business rules. Choose this option to completely remove Administrator Solution 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.

Home

The Home page displays the functionality enabled through Global Settings.

- The User Management Console enables System Administrators to perform all user account maintenance tasks in a single interface.
- Manage Applications is the primary user interface for System Administrators to create or replace applications within OneStream Azure environment.

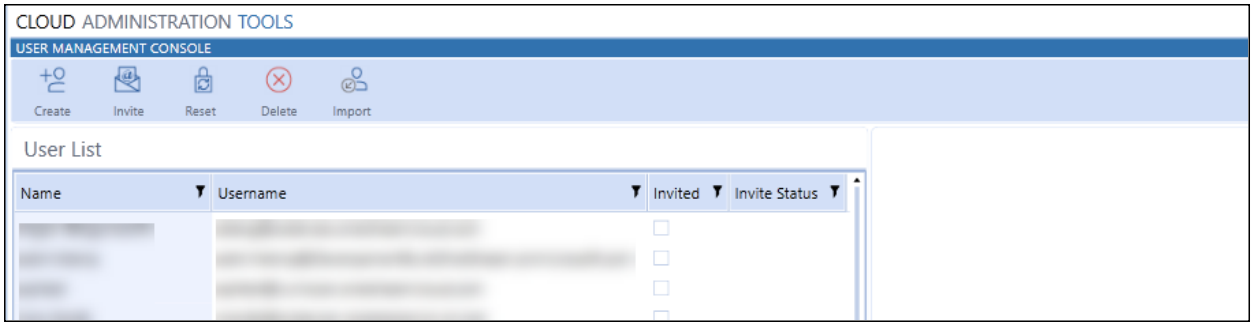


User Management Console

The User Management Console displays a grid containing all Azure AD users and their related actions.

Administrators running platform version 4.x can use the User Management Console to create, invite, reset, delete, or import users. When you launch the User Management Console, the User List is displayed in a grid view which displays the following information about each user:

- **Name**: User's first and last name
- **Username**: Login name
- **Invited**: Indicates if the user was invited from an external Azure AD tenant.
- **Invite Status**: Indicates if the user responded to the invitation.



User Detail

The following user details are displayed if the AD member is a OneStream user:

User Info

- Name
- Description
- Ext Auth Provider

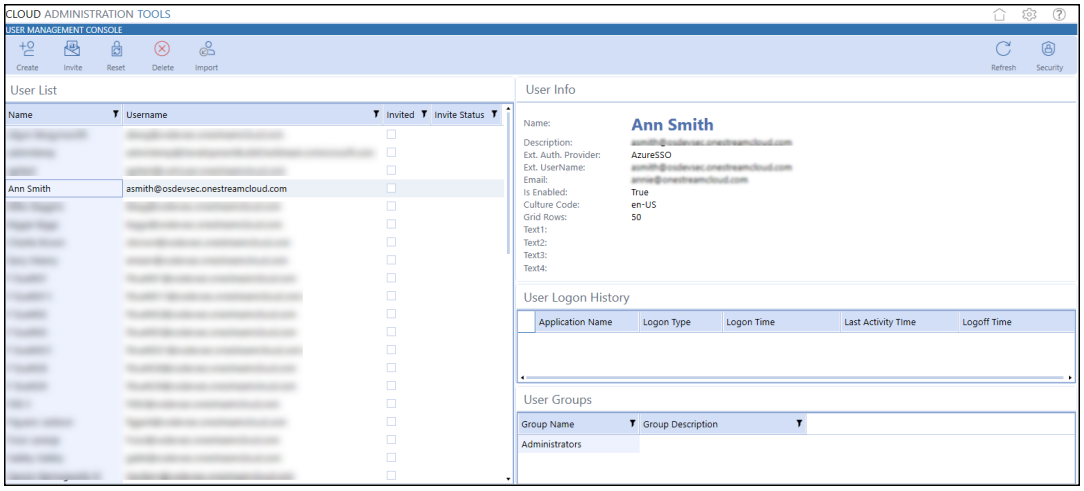
- Ext UserName
- Email
- Is Enabled
- Culture Code
- Grid Rows

User Logon History

- Application Name
- Logon Type
- Logon Time
- Last Activity Time
- Logoff Time

User Groups

- Group Name
- Group Description



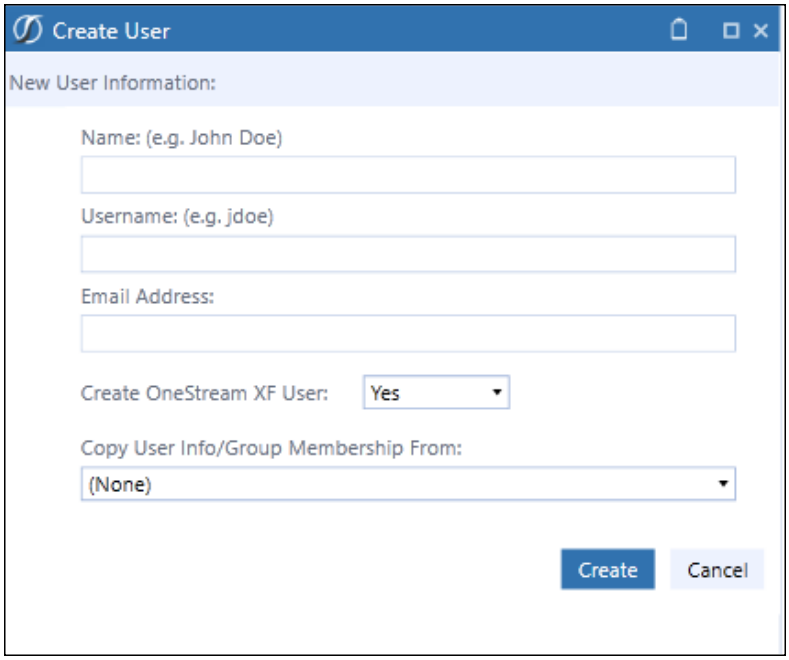
Create User

Create User adds new users to the Azure AD tenant and optionally to the OneStream Framework.

To create a user:

1. On the **User Management Console** page, click **Create** and enter the following information:
    - **Name**: Enter the user's name.
    - **Username**: Enter additional information you want to display to further identify the user.
    - **Email Address**: Enter a valid email address.
    - **Create OneStream User**: Select Yes to add the user to the OneStream FX Framework database.
    - **Copy User Info/Group Membership From**: Select to copy an individual's information or group information.
2. Click **Create** to complete.
3. Repeat the procedure for each user you want to add.

4. Click **Close** to exit the **Create User** dialog box.



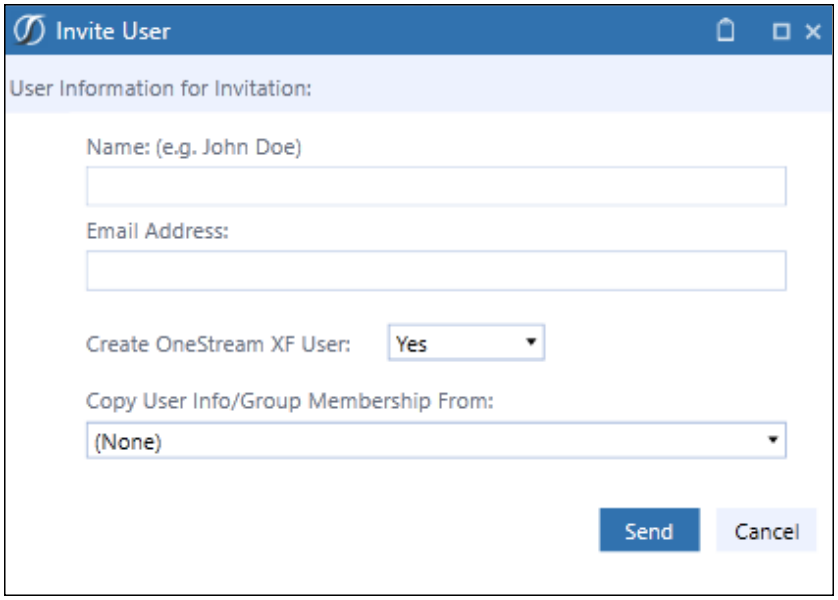
NOTE: Copied security groups may allow access to multiple applications in the OneStream Framework environment, requiring additional security group adjustments on the Security tab of the OneStream **System** > **Administration**.

Invite User

Invite User allows a System Administrator to send an invitation to a user who has an existing Azure AD or Office 365 account not currently in the Azure AD tenant hosted by OneStream Cloud Services. After accepting the invitation, that existing account can access OneStream. This email also contains the company's OneStream environment URL.

Send an Invitation

1. On the **User Management Console** page, click Invite and enter the following information:
    - **Name**: Enter the user's name.
    - **Email Address**: Enter a valid email address.
    - **Create OneStream User**: Select **Yes** to add the user to the OneStream Framework database.
    - **Copy User Info/Group Membership From**: Select to copy an individual's information or group information from the security user information.
2. Click **Send** to send the invitation or **Close** to cancel.



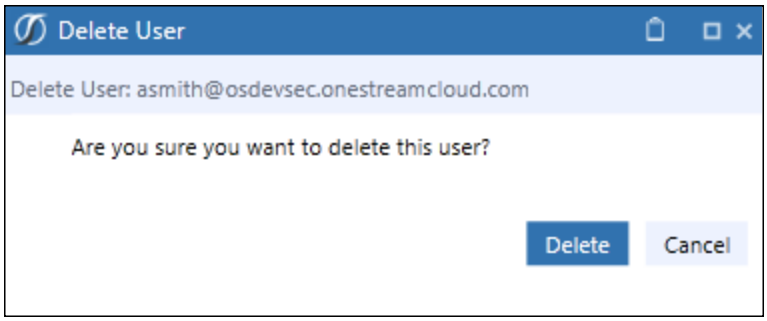
Delete User

Delete allows a System Administrator to remove a user from Azure AD and disable them in the OneStream security.

When a user is deleted from the system, their user information remains in OneStream to preserve the integrity of the audit trail which contains the activity history associated with the User ID.

To delete a user:

1. In **User List** on the **User Management Console** page, select the user to delete.
2. Click **Delete**.
3. In the **Delete User** dialog box, click **Delete** to confirm or **Close** to cancel the process.



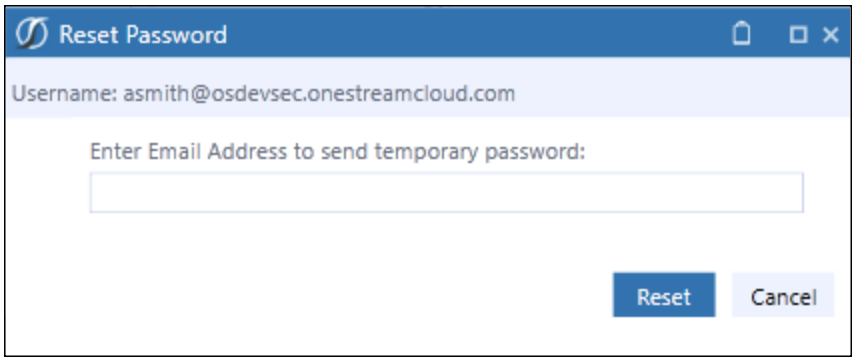
Reset Password

Reset Password lets a System Administrator initiate the password reset process for a user.

The Reset Password function generates a new temporary password and sends it to the user via email. The user will be required to specify a new password the next time they log into OneStream using this temporary password.

Reset User Password

1. On the User **Management Console** page, click **Reset Password**.
2. Enter the user's email address.
3. Click **Reset** to send the temporary password or **Close** to cancel.



Import Users

Import Users allows a System Administrator to perform a bulk create or invite by importing a valid comma-separated values (.csv) file of user properties.

The bulk import process creates users but does not assign a default security group in the OneStream System. Additional security group maintenance in the OneStream System Administration Security tab will be necessary to finalize the new user's access.

Create Users Import Format

The format for **Create Users** is a three column, comma separated file with the fields: Display Name, Username, and Email Address.

Example Create User

```
Displayname,Username,Email
John Doe,jdoe,jdoe@mycompany.com
```

Invite Users Import Format

The format for Invite Users is a two column, comma separated file with the fields: Username and Email Address.

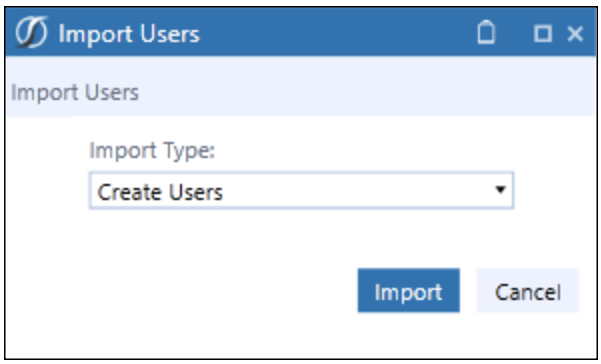
Example Invite User

```
Username,Email
mdoe,mdoe@mycompany.com
```

Import a Create / Invite User File

1. On the **User Management Console** page, click **Import**.
2. Select the type of file you want to import from the Import Type dropdown list (Create Users or Invite Users) and click **Import**.
3. Navigate to the location of the file and click **Open**. The Import Users process executes a data management job for the imported users. This job will run as a background task that

can be monitored from the Task Activity screen.



Refresh

Click Refresh to update a page.

Refresh User Details updates the displayed information for changes in the security domain or the OneStream system security.

Security

Security accesses the OneStream framework.

Security opens the OneStream System/Administration/Security page to manage the system security framework for OneStream users and groups.

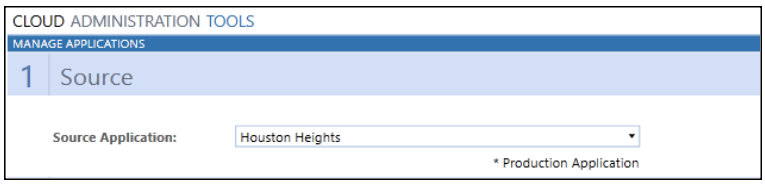
Manage Applications

Manage Applications allows the user to create or replace applications as a copy of existing applications within their OneStream Azure environment.

When entering the Manage Applications functionality, the first step (Source Application) is visible. As each step is completed, further steps will appear, walking the user through managing the application.

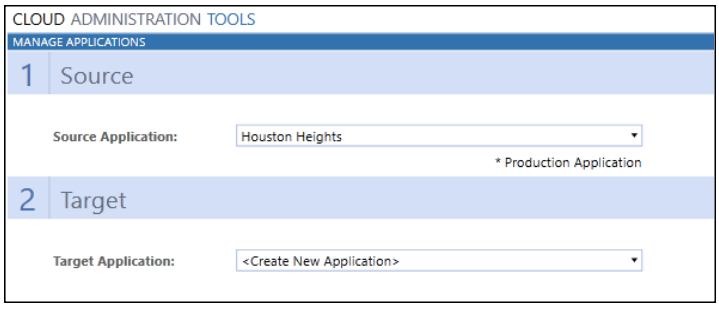
1 | Source

Source Application is the data that is copied to create a new application or replace an existing application. The Source Application displays all active OneStream applications. An asterisk (*) indicates the selected source is a production application.



2 | Target

Target Application creates a new application or replaces an existing application. The drop-down list displays all OneStream applications that can be selected for this action.



> **IMPORTANT:** Replacing the application removes all old data and replaces it with a copy of the application selected in Step 1 (Source Application).

3 | Properties

Use **Properties** to configure options on the application being created.

Application Name

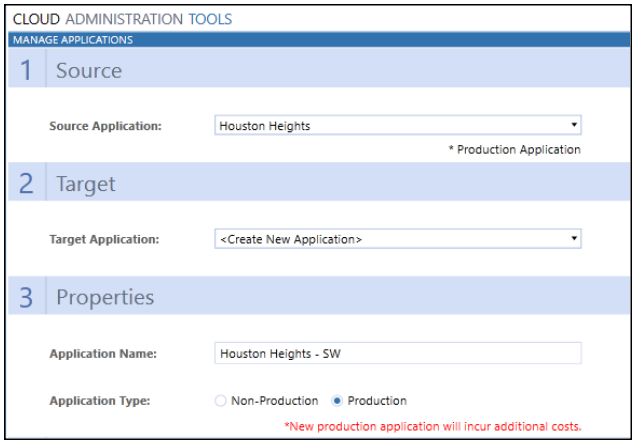
If <Create New Application> is selected in the Target field, the application name is blank, allowing you to choose a unique application name.

If an application is chosen from the Target Application drop-down list to be replaced, the Application Name in Step 3 defaults to the application name field. This application name can remain the same or you can rename the Target Application.

> **NOTE:** Only the following special characters are allowed when naming applications: Period, space, underscore, alphanumeric, and hyphen.

Application Type

Application Type indicates if the application is non-production or production. This field defaults to the application type of the selected target and can be changed. It defaults to non-production if <Create New Application> is chosen. If Production is chosen when creating a new application or when changing a non-production application to a production application, a warning message appears indicating additional costs will be incurred.



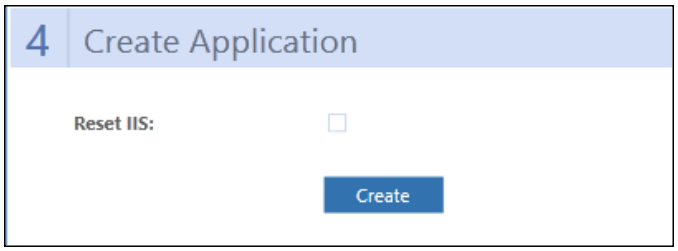
IMPORTANT: Long-term retention policies are applied to newly created production applications and incurs additional costs.

4 | Create or Replace Application

Step 4 displays as either Create Application or Replace Application, depending on the action taken in Step 2.

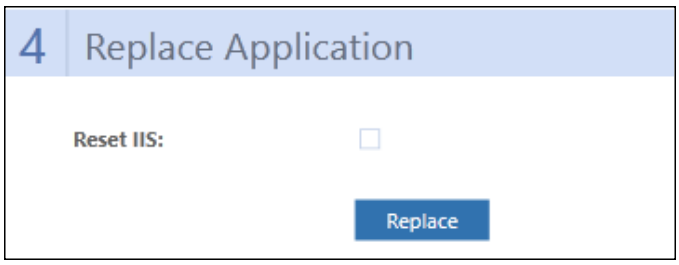
Create Application

If a new application is being created, Create Application displays.



Replace Application

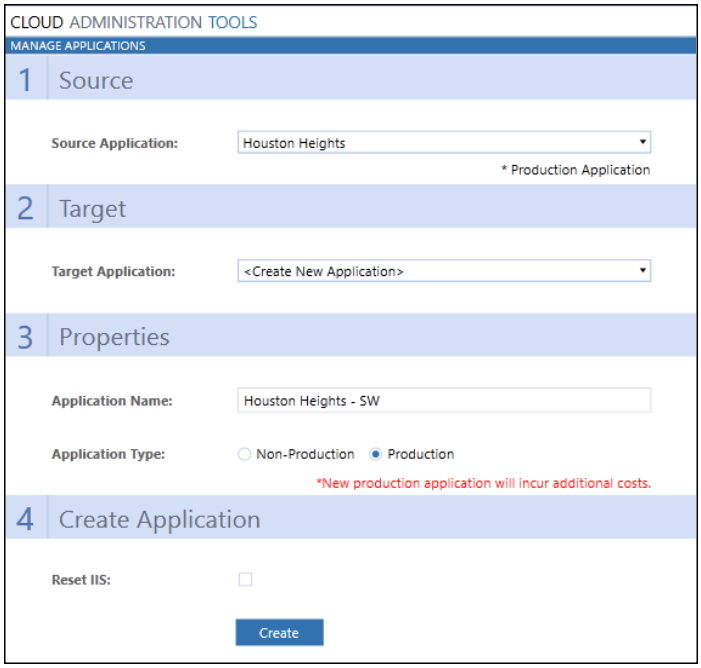
If an existing application was chosen in the Target Application dropdown, Replace Application displays.



Reset IIS

The Reset IIS checkbox determines when to recycle the application pool. Reset IIS must be executed for the newly created or replaced application to appear in the application drop down list when logging in to OneStream.

Reset IIS needs to be determined at the time of managing the application and defaults as unchecked. If unchecked, the Reset IIS process must be manually executed by an administrator before the newly created or replaced application is accessible. Manually resetting IIS can be executed on the **History Detail** page. When Reset IIS is selected, the reset begins when the process of creating or replacing an application is successfully completed.

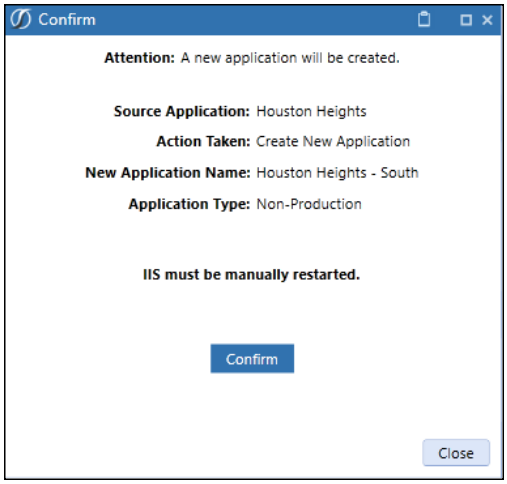


IMPORTANT: Performing an IIS Reset ends all tasks currently in progress.

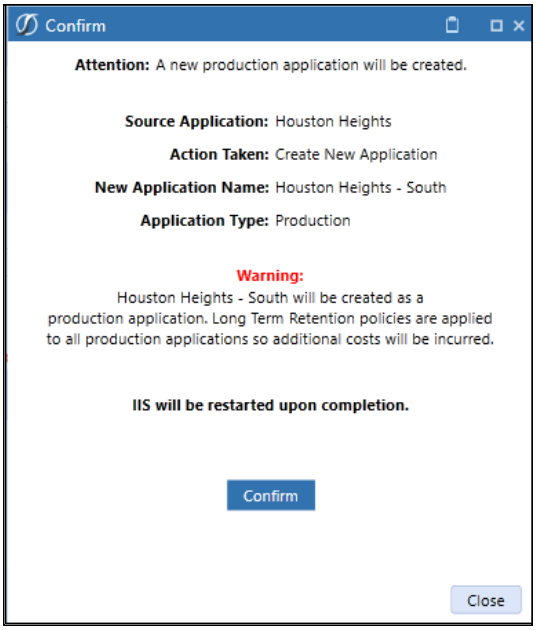
Confirm Summary Page

The **Summary** dialog box appears once the create / replace action executes. The **Summary** dialog box displays the actions that must be confirmed. This summary also displays any warnings such as if a production application is being created. Review the confirmation summary and confirm the actions, then close the dialog box to make corrections or cancel the process. Once you confirm the actions being taken, the **History Details** page displays.

No Warnings



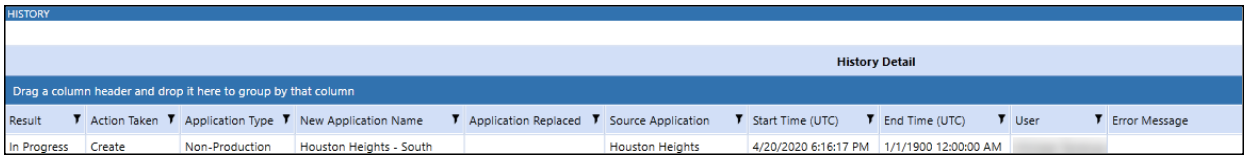
With Warnings



History Details

The **History Details** page displays a comprehensive report of actions performed using Manage Applications.

History Detail includes detailed information of the operations executed through Manage Applications. This page is a filtered table of data that can be pivoted by dragging a column header into the blue bar above to review specific data.



Result: Shows the progression and results of all applications being created or replaced once the process starts. The application states are: In Progress, Success, or Failed. An error message displays in the Error Message column if the status shows as Failed.

> **NOTE:** If the result is showing in Progress, in order to see if the process has completed its action, the page must be refreshed by using the refresh button in the top right corner next to the date filter drop-down combo box.

Action Taken: The action executed by the user. Displays **Create** or **Replace** for all applications.

Application Type: Displays the type of application created indicates if the application is Production or Non-Production.

New Application Name: Displays the new name given to the created or replaced application.

Application Replaced: Displays the name of the old application if an application was replaced. This field is blank if a new application is created.

Source Application: The data used to create a new application or has replaced the data in another application.

Start Time: Indicates the start time of the copy process.

End Time: Indicates when the copy process ended.

User: Indicates the user which created or replaced the application.

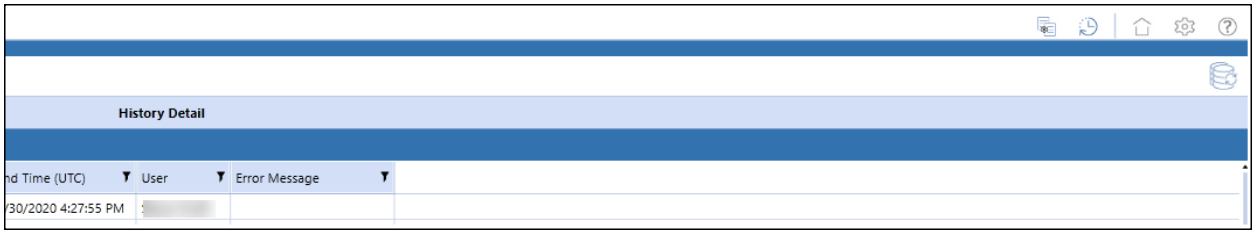
Error Message: If the copy process fails, the Result field shows as failed and a message appears in the Error Message field. This error message explains what the error was and what actions to take next.

Manual IIS Reset

Reset IIS allows users to manually reset applications.

If choosing to manually reset IIS to recycle application pools, navigate to the **History Detail** page and choose Reset IIS in the upper right corner of the page. When choosing this option, confirm the warning that displays and continue the IIS reset, or close the warning and return to the **History Detail** page. Confirming this action will immediately reset all application pools.

The Manual Reset icon does not display when a copy is in progress.


History Detail
nd Time (UTC)
User
Error Message
/30/2020 4:27:55 PM

Help & Miscellaneous Information

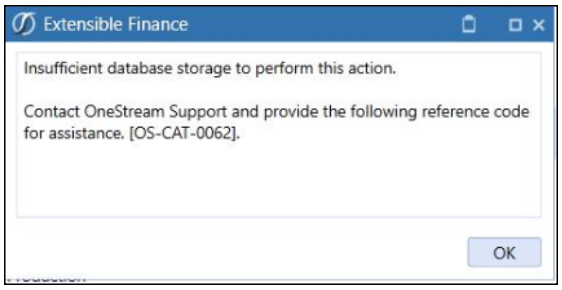
This page contains solution documentation.

Cloud Database Advice

The following are some best practices and other assorted details pertaining to the Cloud Administration Tools.

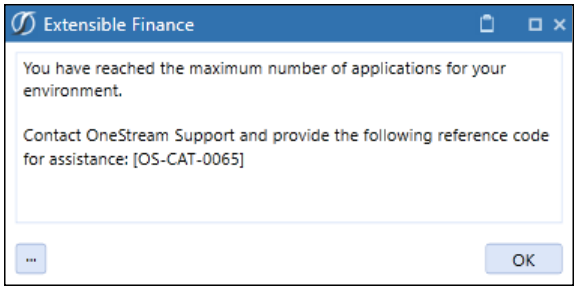
Cloud Database Space

When managing applications, the copy process stops and an error message displays if remaining Azure capacity is insufficient to copy an entire application. OneStream Support may be able to increase your available storage at an additional cost.



Cloud Database Application Limits

You cannot enter the Manage Applications functionality if application limits have been reached If this happens, a message directs you to contact OneStream Support. Support cannot increase the maximum number of databases allowed however they may be able to assist in cleaning up unneeded databases to allow new ones to be created.



Azure Environments

Using Manage Application cannot create or replace applications between Azure environments. An environment is a set of resources dedicated to the hosting of one instance of OneStream. Each unique URL used to access OneStream represents an environment.

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.

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: `CAT_PV5.2.0_SV101_PackageContents.zip`

Identifier	Description
CAT	Solution ID
PV5.2.0	Minimum Platform version required to run solution
SV101	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 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.

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.