

Model Maker Guide

PV680 SV100

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Overview

Model Maker is a MarketPlace solution that provides a simple and powerful user experience for modeling.

Model Maker is an extension of the OneStream Platform that allows you to perform edge modeling efficiently and in a streamlined way. Bend and flex a model quickly, but also have the governance needed to connect that information to the corporate model.

You can create a complete model from the main screen:

- Create public or private models starting from a corporate standard.
- Create members and hierarchies specific to each model.
- Create reports and data entry forms.
- Create data driven formulas, with no scripting.
- Import data from a .csv file directly into the model.
- Integrate the model with the corporate solution.
- Review multiple reports from the same screen and export them in multiple formats.

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.

Dependencies

Component	Description
OneStream 6.8.0 or later	Minimum OneStream Platform version required to install this version of Model Maker.
OneStream App for Windows	Model Maker is optimized for the OneStream application for Windows, which provides the same functionality as the browser-based version of OneStream.

Select the Model Maker 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

- Ensure that all the OneStream artifacts relating to Model Maker, such as entities, are in the Production application. A workflow profile will also be required to import the data back into your corporate model.
- 2. Copy your Production OneStream application to your Development environment and rename it. Use this Development version for your Model Maker project.

Application Server Settings

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 in the application, these adjustments may already exist.

Configure the OneStream Application Server

Be sure that the security group settings include the users set up and use the Model Maker before proceeding.

NOTE: Group settings are applicable to all MarketPlace solutions, so keep group names generic.

- 1. Start the OneStream Server Configuration Utility as an administrator.
- 2. Click **Open Application Server Configuration File > Database**.
- 3. Edit the following OneStream Database Server properties:
 - Access Group for Ancillary Tables: Select a group that includes those who will access records.
 - Can Create Ancillary Tables: True
 - Can Edit Ancillary Table Data: True
 - Maintenance Group for Ancillary Tables: Select a group who will edit and maintain tables.
 - Table Creation Group for Ancillary Tables: Select a group who can create tables.

One	Die Stream Database Server properties:						
•	2↓						
>	Azure Database Connection Settings						
>	Connection String Settings						
~	General						
	Access Group for Ancillary Tables	DB_ANC_Access_Group < Read Access					
	Allow Database Creation via UI	Тгие					
	Can Create Ancillary Tables	Тгие					
	Can Edit Ancillary Table Data	True					
	Database Provider Type	SqlServer					
	Is External Database	False					
	Maintenance Group for Ancillary Tables	DB_ANC_Maintenance_Group Read Access					
	Name	OneStream Database Server					
	Table Creation Group for Ancillary Tables	Everyone					
	Use File Groups when Creating Databases	True					
	Use Table Partitioning when Creating Databases	Тгие					

4. Restart the Internet Information Server.

Install Model Maker

1. On the OneStream MarketPlace, click **MarketPlace** > **Model Maker**.



- 2. On the Model Maker solution page, select the appropriate OneStream platform version from the **Minimum Platform Version** drop-down list.
- 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.

- 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 Model Maker

The first time you run Model Maker, a guided table setup process begins.

In OneStream, click OnePlace > Dashboards > Model Maker > Model Maker.



Create Tables

1. Click Step 1: Create Tables.

This step may be necessary when upgrading even if tables are already present. Model Maker will not remove 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 Model Maker.

Package Contents

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

Data Management

The data management sequences and steps shown in the following image are created to be used with their related business rules. The benefit of running these processes through a data management sequence is that they can run in the background while you continue your work.

Security

After installation, administrators see a drop-down list in the Global Options tab on the Settings page called **Security Role [Access Model Maker]**. It is set to the Administrators security group by default.

Non-administrators, upon installation, will not see Model Maker in the OnePlace tab.

At any point, if the Access Model Maker security group is changed or updated, the administrator will see a validation message stating that the Access Group on all Dashboard Maintenance Units and Dashboard Profile for the Model Maker Solution was also updated.

Administrators can remove and restore any model. Non-administrators can only remove models that they created. Non-administrators cannot restore models that have been removed.

NOTE: Removing a model will also remove the viewing permissions of that model based on security levels other than Private.

Global Options

Use the Global Options settings to set security roles and the scenario type in which every model in Model Maker will use.

NOTE: Global Options are only available to administrators.

If you chose to keep the Access Model Maker Security Role and the Scenario Type defaults, you must click **Save** to register the defaults as your chosen selections.



Access Global Options

- 1. Click Settings.
- 2. Make sure that Global Options is selected.

Security Settings

After installation, the **Access Model Maker** setting is set to the Administrators security group by default.

Create a Security Group

We recommend that the OneStream administrator creates a security group called *Model Maker* and assigns the administrator in the group and any other group that will use Model Maker for their edge modeling process.

At any time, if additional groups need access to Model Maker, the administrator can update children of the Model Maker security group. This action will streamline solution security.

Scenario Type

The Scenario Type is set to **Model** by default.

Model Maker Dashboard

Administrators can see the Settings page and the Help page. They can see Create, Remove, and Restore (with a drop-down list to choose which model to restore).

For non-administrator users, only the Help page displays. They can only see the Create and Remove icons for model cube definitions. If non-administrators need a model cube definition restored, they must contact an administrator for support.

You will notice that the icon for your active page displays a different color to indicate which page you currently have selected.

For example:

Active Page	Inactive Page
Views	Views

Uninstall

The Uninstall feature allows you to uninstall the user interface or all solutions in Model Maker. If performed as part of an upgrade, any modifications that were made to standard solution objects are removed.

IMPORTANT: The Uninstall option uninstalls all solutions integrated in Model Maker.

The uninstall options are:

1. **Uninstall UI** removes all solutions integrated into Model Maker, including related dashboards and business rules but leaves the databases and related tables.

IMPORTANT: This procedure resets the Workspace Dashboard Name to (Unassigned). An administrator must manually reassign the Workspace Dashboard Name after performing an Uninstall UI.

2. **Uninstall Full** removes all the related data tables, data, dashboards, and business rules from all solutions integrated into Model Maker. Select this option to completely remove the solutions 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.

IMPORTANT: The standard Uninstall Full process has been modified to also include deletion of any metadata created in or specific to the Model Maker Solution.

Models

Model Maker offers two options for creating new models: extend a base cube or create a new cube. If you extend a base cube, it inherits all of the dimensions from the base cube.

For every model you create, there is a dedicated cube view group. This makes it easier for security setting, publishing, sharing and model deletion. Each new cube view group is automatically added to the Model Maker Cube Views Profile.

You can create, extend or remove a model. The Last Action column shows the status of model cube definitions that has a model cube created for it. If a model cube has not been created, the Last Action column will remain blank. Last Action types include:

- Created: Displays when you create a model cube definition.
- **Copied**: Displays when you create a model cube definition from an extension of an existing model.
- **Removed**: Displays when you remove a model cube.
- **Restored**: Displays when an administrator restores a removed model cube. Only administrators can restore a model cube.

Each cube view group follows this naming convention:

mlm_[Model Cube Name]_Dimension suffix

NOTE: If you leave the Base Cube Name field empty, OneStream creates a new cube with new dimensions at the root level.

Model Security

The Security column indicates if the model is Private, Public, or limited to a specific group.

- **Private**: You created the model and only you can see it. Private is the default setting.
- **Public**: Everyone in the Access Group established in Global Options can see the model.
- Other Groups: Specific groups in the Access Group as established in Global Options.

You can assign different security levels on each of your models.

When you navigate to other sub-solutions in Model Maker, such as Formulas or Views, you will only see the Public models and your Private models listed in the model cubes drop-down list. This is the same case for each sub-solution that contains a model cube drop-down list.

If a security group outside of Public or Private is assigned to the model, you will only have permission to view models assigned to that group if you are in that group. For example, if Club Controllers is assigned to the Security of a given model cube, you would only see it if you are a user in Club Controllers.

NOTE: If you are not an administrator, you cannot change security on a model that you did not create.

For more detailed information about Model Maker security, see "Appendix A Security" on page 84.

Create a Model

You can edit the Description and Security columns from the Model Page dashboard after you create a model. However, after you create the model, you cannot edit the Model Cube Name, Base Cube Name, Dimension Suffix, Scenario Type, Last Action, Time Stamp or User Name columns.

No Cube Selected displays above (and to the left) of the Model Cube Definitions table. This is replaced by the model cube name when you create and select a model cube. If you did not create the model cube from the model cube definition, **No Cube Selected** will remain. This indicates model cube definitions that have yet to be created.

Model cube definitions must be unique. If you try saving a new model cube definition with the same model cube name and dimension suffix for any Last Action state, you receive a validation message.

- 1. Click Launch Model Cube Creator Page.
- 2. On the Models dashboard, click Insert Row and enter the following information:
 - a. Model Cube Name: Name of the model
 - b. Base Cube Name: Name of the base cube. Required if you are copying a base cube. To extend from an existing corporate model, see "Extend a Model" on page 16.
 - c. Dimension Suffix: Required to segregate dimensions created for the new model.
 - d. Description: Detailed description for the model

- e. **Scenario Type**: Defaults to the Global Settings scenario type after saving the model cube definition.
- f. **Security**: Defaults to Private. The list in the Security column reflects the group children assigned under the Model Maker security group.
- 3. Click Save.

Model Cube Name 🔻	Base Cube Name 🔻	Dimension Suffix 🔻	Description T	Scenario Type 🔻	Security Y	Last Action 🔻
Demo		DemoModel	Demo model	Model		Created
Finance	Austin	FPlan	Finance Plan	Model	(Private)	Created
Montreal		MSales	Montreal Sales	Model		Created
SalesPlanning		SPlan	Sales Planning model maker	Model	Houston	Restored
Test		Test Model		Model		Created
Toledo		ToledoPlan	Model plan for Toledo	Model	(Private) <	
VendorPlanning		VPlan	Vendor Planning model maker	Model	(Public)	Created

NOTE: When you save a model cube definition, the description is the only editable field.

- 4. Click Create.
- 5. Add provided dimensions from Platform. Because the model was created from root, establish your members and create hierarchies for the dimensions provided.

Because you created a new cube, all dimensions are created at the root level except for Entity and Scenario. This cube is separate from the rest of the application and you can add members to new dimensions.

NOTE: The Entity and Scenario dimension are named mlm_EntityDim_ *Dimension Suffix* and mlm_ScenarioDim_*Dimension Suffix*, respectively.

Extend a Model

Extending a model allows you to apply extensible dimensionality. The dimension hierarchies in the extended model are inherited in Model Maker so you can modify members specifically for your edge model case. When extending from a corporate model, Model Maker will inherit the corporate design at that point in time.

NOTE: By default, IC Entity is set to False. If you extend a model where the original entity dimension member is set to True, the newly created entity dimension member for IC Entity is False.

- 1. On the Models dashboard, click Insert Row and enter the following information:
 - a. Model Cube Name: Name of the model
 - b. **Base Cube Name**: Name of the base cube based on the cube you would like to extend.
 - c. Dimension Suffix: Required to segregate dimensions created for the new model.
 - d. Description: Detailed description for the model
 - e. Scenario Type: Defaults to the Global Settings scenario type.
 - f. **Security**: Defaults to **Private**. The list in the Security column reflects the group children assigned under the Model Maker security group.
- 2. Click **Save** and then click **Create**.



3. Select the Base Scenario and click **Continue**. A dialog box displays that the cube was created. The dimensions of the base cube name are now inherited.

See "Members" on page 21 for more information.

Remove a Model

When you remove a model cube, all items related to that model are archived and then deleted. These include the following items, removed in this specific order:

- 1. Data
- 2. Parameter sets
- 3. Cube views
- 4. Integrations, for example transformation rules, data sources, and connectors
- 5. Data management jobs
- 6. Metadata
- 7. Dimensions and members in the cube

NOTE: If you remove a model by mistake, you can contact your administrator to restore model cube assets. However, data is not restored.

The removed models display in the Model page dashboard but the Last Update column will state **Removed**. If you would like the administrator to restore the model at any time, the model name is available in the list.

NOTE: If you do not want to see the removed models in the list, you can reorder the Last Action column through the column filter.

- 1. Select a model cube from the list.
- 2. Click Remove.

Model Cube: VendorPlanning							
+-081							
Model Cube Name 🔻	Base G	Cube Name 🏾	Dimension Suffix T	Description			
GolfStreamApp	GolfS	tream	GSApp				
VendorPlanning			VPlan	Vendor Planning for 2023			
-							
		Ø Remove	Model Cube	Ô 🗆 ×			
		S Remove	Model Cube	<u>0 □×</u> ?			
		S Remove	Model Cube	Continue Cancel			

3. Click **Continue**. The Last Action column updates to Removed.

A data management job runs to remove all artifacts.

+ - O H Model Cube Definitions									
Model Cube Name 🕈	Base Cube Name 🕈	Dimension Suffix 7	Description T	Scenario	тура 🕇	Security ¥	Last Action 1	Last Action Date	User Name 🕈
GolfStreamApp	GolfStream	GSApp		Model		(Private)	Copied	4/18/2022 12:58:11 PM	Admin
VendorPlanning		VPlan	Vendor Planning for 2023	Model		(Private)	Removed	5/12/2022 11:40:39 AM	Admin
								वे	

IMPORTANT: If you highlight a Removed model cube, click on the "-" icon and save

it. The model cube is permanently deleted and the model cannot be restored.

Restore a Model

NOTE: Only users with administrator privileges can restore models.

Click **Restore**. The model appears in the list and the Last Action column updates from Removed to Restore.

Models

Create 🔶	Remove $igodot$	Restore VendorPlanning	• 🦓
			Restore Model Cube

Administrators can restore removed model cube definitions from a drop-down list of removed cubes from the Model page.

NOTE: You cannot create a model based on a model that has been removed.

Members

The Members page allows you to create new metadata either for a model created from root or from an extended model. It inherits the corporate structure while allowing downward extension to achieve a higher granularity. It also allows for departmental use cases not implemented in corporate models. You can extend every dimension freely, as long as you choose member names that are not already in use for that dimension type.

Import and Manage Members

Use the Members page to create or configure metadata and dimensions, or the members you will use in your application.

There are many ways to enter new dimensions and members. You can manually add them or add extended members under existing members. Both ways are valid and will create the metadata needed for your model.

- 1. Click Launch Member Manager Page.
- 2. In **Model Cube**, select the new cube you created or an existing cube.

NOTE: If you selected a model on the Models page, that model will be selected.

3. In **Dimension**, choose a dimension type to extend.

Members



4. Make sure that **Auto Update** is selected.

This ensures the spreadsheet automatically refreshes. If it is unchecked, you will need to select the Refresh icon to refresh the spreadsheet. Auto Update is enabled by default.

5. Scroll through the Parent hierarchy to see the structure inherited from the application.

6. Use the spreadsheet on the right to edit members. When you highlight a member in the hierarchy, the spreadsheet will refresh with the information last saved for that member. Save minor edits of the member attributes in the spreadsheet component.

Model Cube				
GolfStreamApp - Corporate •	A2 • ×	 f. Parent: 60000 		
Dimension	A	В	c	D
mlm_CorpAccounts_GSApp •	1			
	2 Parent: 60000	Dimension: mlm_CorpAccounts_GSApp	Account Type	Is Average
Members Auto Update 🔳	3 AdsRevenues		Revenue	False
	4 SubRevenues		Revenue	False
Filter	5			
000 - Earnings Before Interest and Taxes •	6			
62000 - Total Operating Income	8			
- 61000 - Gross Income	9			
 60999 - Net Sales 	10			
60000 - Operating Sales	12			
AdsRevenues	13			
SubRevenues	14			
- 60100 - IC Sales	15			
CODO - Detures & Allemanes	16			
60200 - Returns & Allowance	17			
60250 - Other Outside Sales	18			
- 43000 - Cost of Goods Sold	20			
	21			
୍ ତ୍ ତ୍ ତ୍ ତ୍ ତ୍ ବ୍ କୁ ମ 🔛	22			
	23			

 In the example above, AdsRevenues and SubRevenue were added to the inherited member of account 60000 - Operating Sales.

The spreadsheet updates with the hierarchy in the Parent field.

8. When you select an item in the Parent hierarchy the spreadsheet view to the right updates.

NOTE: Blue rows in the spreadsheet are for new members.

Action Icons in Member Hierarchy

You can only make modifications to the hierarchy on members that were created in Model Maker. You cannot modify members in gray because they are inherited.

Member Hierarchy Options

lcon	Description
Θ	Delete the member.
G	Delete the member and its children.
0	Rename the member.
Ō	Copy the member.
Q	Paste a selected member.
م	Move the member to the parent level.
ر ې	Move the member down.
ð	Move the member up.
∎↑	Sort the member children up.
₽↓	Sort the member children down.

Upload Data from a Text File

The **Load**, **Type or Drop Here** box is ideal for bulk loads. To make minor changes to bulk metadata, use the spreadsheet to add a member and assign the Account Type if applicable, then click **Save**.

Use Load, Type or Drop Here to populate the hierarchy in multiple ways. You can load members via text or .csv file, freehand, or use the spreadsheet columns to establish parent and children to copy and paste into this text box.

To load from a text or .csv file, select **Upload text file** below the text box to retrieve the file and click **Create New Hierarchy**. When loading an external file, use a space, comma, or semi-colon to separate member name and descriptions. Use double quotes to include spaces in the name or description.

Click the Information icon for more information on using the Upload text box.



Upload your account information using a semi-colon and indented syntax format into the **Load, Type or Drop Here** box.

1. Click Upload text file.



- 2. Browse to the text file and click **Open**.
- 3. The account syntax from the text file populates the box.

Members



4. Click Create New Hierarchy to create the group, the accounts and any hierarchies.

Copy and Paste from Excel

1. If you have a hierarchy of members in Excel, copy the cells.

Accounts			
	AppDriver	s	
		CustomersNumber	
		MonthlySubscription	
		AdsDrivers	
			AvgAdsViews
			ClickThroughRate
			ViewValue
			ClickValue
		ServersDrivers	
			AvgServerCapacity
			AvgServerCost
		EmployeesDrivers	
			AvgEmployeeSalary
			NoEmployees

- 2. Paste the cells in the Load, Type or Drop Here box.
- 3. Click **Create New Hierarchy** to add the members you pasted from Excel into the dimension hierarchy.



The new content from Excel also displays in the spreadsheet.

A	6 • I × ✓ fx ApoDrivers				
	A	В	С	D	
1					
2	Parent: Root	Dimension: mlm_CorpAccounts_GSApp	Account Type	Is Average	
3	GAAP Account Structure		Group	False	
4	IFRS Account Structure		Group	False	
5	SystemAccounts		Group	False	
6	AppDrivers		Group	False	

4. After you add content from Excel, select a dimension in the Parent hierarchy to make changes in the spreadsheet.

5. Change the Account Type, Is Average, or Weight.

C	C3 • I × ✓ fx NonFinancial				
	A	B	С	D	
1					
2	Parent: AppDrivers	Dimension: mlm_CorpAccounts_GSApp	Account Type	Is Average	
3	CustomersNumber		NonFinancial	T Ise	
4	MonthlySubscription		Group	hise	
5	AdsDrivers		Revenue	lse	
6	ServersDrivers		Expense	lse	
7	EmployeesDrivers		Asset	lse	
8			Liability		
9			Flow		
10			Balance		
11			BalanceRecurring		
12			NonFinancial	•	

Weight can be:

- 1: Aggregate all the data to the parent.
- 0: Data does not aggregate; it is false.
- -1: Change the data aggregation to negative values. For example, change the account type to expense for a negative value.

The Aggregation setting is available in all Account, Flow and UD dimensions. This setting can change for a Base Entity based on its parent. If a member is reused in a dimension, but it does not need to sum up more than once, set the weight to 0 data in this node and it will not allow the member to aggregate to the top.

6. Click Save.

Add Information Directly to the Spreadsheet

If you are making minor changes you can also use the spreadsheet to add a member and assign the Account Type if applicable, then click **Save**.
1. Copy a few cells from Excel to extend the account.

60000		
	AdsRevenues	
	SubRevenues	

2. Highlight the account in the Member hierarchy. The spreadsheet display updates to show this account.



3. Paste the cells directly into the spreadsheet view.

AB	\bullet \bullet \bullet \bullet \bullet \bullet	AdsRevenues
	А	В
1		
2	Parent: 60000	Dimension: mlm_CorpAccounts_GSApp
3	AdsRevenues	
4	SubRevenues	
5		

4. Select the Account Type and click **Save**. The Parent hierarchy dynamically updates to reflect what you changed in the spreadsheet.



Views

Create views for the data in the model for input and reporting.

Select rows, columns, and point of view for what you would like to see in the report. After you build the report, return the results as a web form, spreadsheet, or a PDF. Save the view as either private or public.

You can use views that you have already created as a basis for formulas, data input and reporting.

NOTE: The rows and columns dimension defaults to children and not base.

Design the Cube View

The Views page allows you to design what your cube view will look like. You can save filter values that dictate how your cube view is rendered. Your cube view is not created until you click **Create Cube View**.

After you create your cube view on the user interface you are looking at the visual interpretation of the data at the time the cube view was created. You will see the actual cube view on the Formulas or Review pages.

You can create a cube view for:

- Formula editing on the Formulas page
- · General use such as data import and collaboration

After you create a model, cube views that you create in a model are stored in that model's cube group.

NOTE: The Access and Maintenance group in the cube view group inherits the security group assigned in Global Settings Access and Maintenance Group settings upon creation.

Open the Views Page

- 1. Click Launch Cube View Builder Page.
- 2. Select a cube.

NOTE: If you selected a cube on the Model page, these filters are pre-selected: Scenario, Entity, Account, UD1-8, and the cube section of the Select Member dialog box.

3. Select specific cube view properties, point of view, and style.

NOTE: Style applies to Cube View and Spreadsheet.

4. (Optional) For each dimension, choose a point of view member.

Cube View Properties	
Area in Header Toolbar	Description
Model Cube Rows GolfStrApp - Cor Accounts Columns 2022M3 Image: Columns Image: Columns Image: Columns Image: Columns Image: Columns Image: Columns Image: Columns Image: Columns	Rows and Columns filters provide the design flexibility needed to determine the granularity of your dimensions in a cube view. 1 - Use the first 3 icons (Open Saved Filter Values, Save Filter Values, and Delete Saved Filter Values) to design and modify your filter definition. 2 - Use the fourth icon (Create Cube View) to create the actual cube view.
Row Query Children Column Query Children Children	Options to keep or remove specific members Each query has its own keep or remove member filters.

Cube View Properties	
Area in Header Toolbar	Description
Cube View Somario Time View Cons Origin Entity Account Row IC Read Only mim_BudgetV2_Z 2022M3 YTD Local BeforeAdj mim_All OrgLAP GAAP Account R None None Style UD1 UD2 UD3 UD4 UD5 UD7 UD8 No Style Top Top Top Top WRS All Product Cites All Product Cite	Point of View: All dimensions that are neither in row nor column and are instead the Point of View of the cube view.
Input Alloc	Input Allocation: Allocate equal values to children members of a parent. Apply the total value on the parent and the children will get the shared value of that total. NOTE: Input Allocation is only displayed if you select Read Write from the Cube View dropdown list.

Select Rows and Columns

1. In **Rows** click an option.

Model Cube	Rows		Row Query		
GolfStreamApp 🔻	Accounts 🔹	GAAP Account St	Children •	+-	×
	Columns		Column Query		
	Times •	2022	Children •	+	×

NOTE: If the cube view uses the Account dimension in Row or Column, the drop-down list for the Formulas page will include that cube view and you will be able to write formulas into the accounts chosen.

2. Click a Row or Column name and the Select Member dialog box opens. The filters for each dimension display in a hierarchy.

Ø Select Mem	ber	Û	□×
Cube	GolfStreamApp		
Dimension Type	Account		
Dimension	RootAccountDim		•
Hierarchy Se	earch		
🗆 📳 None			î
🖛 📳 GAAP Ad	count Structure		
🕨 🔁 Incor	ne Statement		
🕨 🖶 📳 Balar	nce Sheet		
🕨 📑 Ratio	s		
🕨 🍢 🎦 🕨	stics		
🕨 🔁 Flash			
🕨 📑 Alloc	Account Structure		
🕨 🖶 ElseG	JAAP		•
	ОК	Ca	incel

3. Select or search for a member.

4. Click OK.

Model College 1	lited	Rise Oueric	Caba Mara	Economia	Toma	Mary	Com	Origin	factor.	Access	Deer	10°	
Coltransion	erauth • \$1000	Diamino, • (=	Read Up to a	and the second of	hallber	Berlady	1407	- Bellowlet	nin familie d	82020	No.		The dates
			1000	and an and a second	COLDW1	renere.		- second		- New		- Here	10014105
	ourres	Column Query	55/10	001	002	003	0.04	003	006	007	008		
10 0 0 0: 0	0/0 * 10P		so spe	100	COTTROVENUE	none	Nore	None	Nore	None	Nore	_	
О Н 🗎 🕼							Cube View						
A 1	Golf Course Management	t Event Management Food & I	leverage ProShop I	etail Golf Pro Sta	iff Equipment Ma	intenance Grou	nd Maintenance	Material Manager	vent Logistics P	hoduction Quality	ty Management	Distribution Engl	neering Purchasing
AppEmployeesSalar	y												
AppEmployeeBonu	6												
Base													

- 5. To multi-select members to keep for rows and columns:
 - a. Click Keep Row Members or Keep Col Members.

Model Cube	Rows		Row Query	
GolfStreamApp 🔻	Accounts •	50200	Children Incl	+- ×-
	Columns		Column Query	
⁄∕	UD1s 🔹	Тор	Base 🔹	+ - ×-
	0013	100	buse	

The Keep Members dialog box opens.

Ø	Keep Members	Ô 🗆	×
	EquipMaint - Equipment Maintenance		-
	GroundsMaint - Ground Maintenance		
	MatMgt - Material Management		
	Logistics		
	Production		
	QualMgt - Quality Management		
	Dist - Distribution		
	Eng - Engineering		
	Purch - Purchasing		
	HR - Human Resources		
	Infrastructure		
	Development		
	Legal		
	Facilities		
	Exec - Executive		
	Admin		
	Sales		
	Mkt - Marketing		
	Advert - Advertising		•
	Continue	Cancel	

b. Select the members to keep and click **Continue**.

The cube view updates to show the members you selected.

Model Cube	Rows	Ro	ow Query		Cube View	S
GolfStreamApp 🔹	Accounts	50200 Cł	hildren Incl 🔻	÷ ×-	Read Write	•
	Columns	Co	olumn Query		Style	U
⁄	UD1s 🔻	Тор Ва	ase 🔹	÷= ×=	No Style	•
ଚଳା 🗈 🛤]					
ð	Human Resources	Infrastructure	Development	Executive	Marketing	
AppEmployeesSal	lary					
AppEmployeeBon	nus					
Base						

- 6. To multi-select members to remove for rows and columns:
 - a. Click Remove Row Members or Remove Col Members.

Model Cube	Rows			Row (Query		
GolfStreamApp	Accounts	• 600	00	Child	ren Inci 🔹	+	×
	Columns			Colun	nn Query		
	UD4s	▼ Totall	Jsers	Child	ren Inci 🔻	+	× -
0810	K III						
\$	FreeUsers	PremiumUsers	TotalU	sers			
AdsRevenues							
SubRevenues							
Operating Sales							

The Remove Members dialog box opens.



- b. Select all of the members to remove and click **Continue**.
- c. The cube view updates to show the members you selected no longer appear in the view.



Select a Template

In Rows and Columns choose **Template**. Templates allow you to select another cube view that you have in the application and it will share the rows from that cube view.

Administrators may use templates to provide pre-defined row sets and column sets.

- 1. In Rows, click **Template**.
- 2. Select a specific template to apply.



Preview a Cube View in Spreadsheet or Report

While designing your cube view, you can visualize what it will look like prior to creating it using the spreadsheet or report viewer. For more information on using spreadsheets or reports, see Design and Reference.

Click Spreadsheet.

	Rown		Res Query		Cube Vew	Scenario	Time	Vine	Cons	Origin	terry Acc	ours Pa	le	ĸ	
finiage-Cor.	· Assure ·	40000	Drawine. *	5.25	Read Vinte	· in Automici	assava	Pariodia	Local	Betraild	min,Shanghai,S	63330	None	Nena	Input Alex
	Columna		Column Duarty		State	UD1	100	U01	154	U03	104 107		10		
8 0 8		* Malikeskeit	Didunitel. *	10	No Dyle 1	Nore	Goffminellos		Teleformies	None	Nare	Nana	Nana		
	-														-
H D									Cobe View						
	R. FreeUsersApp	2 Premiumitisers	unders generation	e .											
differencesity	665														
abhavanuach	665														
perating Sales															
											_		_		_
			Adolese 🖅	60 %	+ C - +	fax, (VII, Sep	etala •	P Search (At-	0)		-	manda Manoni	0	a -	0 ×
			file Home	insert	Page Layout	Formulasi	Data Review	View Help	OneStream					Comments	d Share
			A1 *	L.	V [k										
			4 A				¢	Ð		F 6		1.0	Onetre		- ×
			3		-	_			-				Unesu	eam	
			3		FreeDamApp	2 Premiu	nUseruApp2	TotalUsersApp2					0.00	3 G O I	0 0 0
			4 Addresses	lippð									1 8	8 1 1	+ + X
			5 Subfevenues	rbb5									Quick View		
			2												
			8										Child Vie	- NW	
			9												100
			30		-								0.00		
			12										A		
			13										A		1.1
			34		_								1 to 1-		
			15		-								12		- * ·
					-										
			3.P												
			17	H, CVB					1				POV 0	brick Views	ocuments

Click Report.



Save Filter Values

1. Click Save Filter Values.

Model Cube	Rows			Row Qu	lery		
GolfStreamApp	Accounts	• 600	00	Childre	n Incl 🔻	+	×
	Columns			Columr	Query		
	UD4s	 TotalU 	sers	Childre	n Incl 🔻	+	×
O	er Values						
- <u></u>	FreeUsers	PremiumUsers	TotalUs	ers			
AdsRevenues							
SubRevenues							
Operating Sales							

 In the Save Filter Values dialog box, enter a name and description for this dynamic cube view. For other modelers to see it, select **Public**. It is **Private** by default.

${\mathscr D}$ Save Filter Values		Ô	o x
Name			
F4_Revenues			
Description			
F4_Revenues			
Filter Values Visibility			
🔘 Private 💿 Public			
C	Continue	Ca	ncel

3. Click **Continue**. Your filter value is saved.

Delete Filter Values

1. Click Delete Saved Filter Values. The Delete Filter Values dialog box opens.

🕥 Delete Filter Valu	ies	Û	□×
F4_Revenues (All)	Continue	Ca	• ancel

2. Choose the filter value from the list and click **Continue**. The filter is deleted.

Open Filter Values

When you click Open Saved Filter Values, it is a dynamic cube view. This cube view is not a real cube view but rather set to display column and row data based on selected member filters only.

1. Click Open Saved Filter Values.

	Model Cube	Rows		Row Query		
	GolfStrApp - Cor 🔻	Accounts	GAAP Account St	Children	•	1
		Columns		Column Query		
		Times 🔹	2022M3	Children	•	1
Ī	Open Saved Filter	Values	Report			

The Open Filter Values dialog box opens.

🕥 Open Filter Values	Û	□×
R1_IncomeStatement (Private)		•
Continue	C	ancel

2. Choose a filter value from the list and click **Continue**. OneStream sets all the variables and shows data.

el Cultre	Rows		Row Query			Cube View		Scenario	Tane	View		Cons	Cons Origin	Cons Origin Entity	Cons Origin Entity Account	Cons Origin Entity Account Row	Cons Origin Entity Account Now IC
40.0	Accounts	 Income 	Datement Tree		- 22	Read Vinte		min, Sulprist,	3021		Periodic	Neriodic Local	Nrinds Local BeforeAd	heriodic Local Deforabil (mim,Shanghai,G	herodis Local Betweid min, Shanghai, S Income Statemer	feriodic Local Betrefict min,Shanghai,G Income Statemer None	heladic Lacui betrevid nin, Shangha, G (Income Statemer) None None
	Columns		Column Qu	ery.		Style		UD1	900	000		004	UD4 UD5	UD4 UD5 UD6	UD4 UD5 UD6 UD7	UD4 UD5 UD6 UD7 UD6	UD4 UD5 UD6 UD7 UD6
9 🖪 🖯 👪	Times	• 2	21 face		2	No Style	٠	Top	Gofftwiselapp		Top	Ter Ter	Top Top Norw	Top Top Norw Norw	Top Nor Nore Nore Nore	Top Top Nere Nere Nere Nere	Top Non Norw Norw Norw
H I B B												Cube View	Cube View	Cube View	Cube View	Cube View	Cube View
			Jan 2021 Feb 202	1 Mar 20	1 Apr	2021 May 2	021 3	un 2021 Jul 202	11 Aug 2021 S	ų	ap 2021 Oct 2021	ap 2021 Oct 2021 Nov 2021 Dec 2	ap 2021 Oct 2021 Nov 2021 Dec 2021	ap 2021 Oct 2021 Nov 2021 Dec 2021	ap 2021 Oct 2021 Nov 2021 Dec 2021	ap 2021 Oct 2021 Nov 2021 Dec 2021	ap 2021 Oct 2021 Nov 2021 Dec 2021
Income Statement																	
Net income			_														
E Earnings Before	Tares																
E Earnings Before	interest and T	lanes.															
E Total Operation	ig income																
E) Gross Incom	*																
E) Net Sales																	
E) Operating	y Sales																
Adultava	mues																
Subfree	mues																
IC Sales																	
Returns &	Allowances																
Other Out	tside Sales																
E Cest of Go	ods Sold																
E) Operating	Cost of Good	s Sold															
ServersC	test																
IC Cest of	Goods Sold																
E Total Operation	ing Expenses																
E Total Opera	rting Exp Befor	e Allocatio															
E) Total Emp	koyee Compen	sation															
10 Total Em	ployee Salary																
E Base																	
Apple	mployeesSalary	¥															
App0	mployeeBonus																

 (Optional) In cube view change Read Only to Read Write if you want to change any of the data.

At this point it is not saved as a cube view.

Opening a previously saved filter view has its advantages. If there are a few modifications you would like to make for a new cube view, you can use a previously saved filter value as a baseline for those minor adjustments, save those filter values using a new filter value name, and create that modified cube view from your modified parameter set.

NOTE: If you save a filter value using a previously used name, your filter values will be overridden by the newest value set. However, this action will not override a materialized cube view for the original saved filter value. Filter values are not actual cube views, they are a saved set of parameter filters.

Create the Cube View

Create a cube view for formulas.

NOTE: How you set up the cube view and which settings you choose (**Formula Filter**, **Parameter Filter**, or **POV Bar**) dictate how you will be able to use it in formulas.

- 1. Click Create Cube View.
- 2. Enter a name and description.
- 3. Select settings for the cube view member filters. The dimensions you chose for the row and column will automatically default to POV Bar and all the other dimensions will be set to Formula Filter.

Ø Create (Cube View		Ô ¤×
Name			
F4_Revenue	s		
Description			
Description			
F4_Revenue	S		
Scenario	Formula Filter	O Parameter Filter	O POV Bar
Time	Formula Filter	O Parameter Filter	POV Bar
View	Formula Filter	O Parameter Filter	POV Bar
Cons	Formula Filter	O Parameter Filter	POV Bar
Entity	Formula Filter	O Parameter Filter	OV Bar
Account	Formula Filter	O Parameter Filter	POV Bar
Flow	Formula Filter	O Parameter Filter	O POV Bar
IC	Formula Filter	O Parameter Filter	O POV Bar
Origin	Formula Filter	O Parameter Filter	POV Bar
UD1	Formula Filter	O Parameter Filter	POV Bar
UD2	Formula Filter	O Parameter Filter	POV Bar
UD3	Formula Filter	O Parameter Filter	POV Bar
UD4	Formula Filter	O Parameter Filter	POV Bar
UD5	Formula Filter	O Parameter Filter	POV Bar
UD6	Formula Filter	O Parameter Filter	POV Bar
UD7	Formula Filter	O Parameter Filter	POV Bar
UD8	Formula Filter	O Parameter Filter	OPOV Bar
Note: If formu	las are needed in t	his cube view, all din	nensions
should be set	to Formula Filter.		
		Continue	Cancel

NOTE: If you plan to apply formulas to the cube view, set all dimensions to Formula Filter.

a. **Formula Filter**: Sets the cube view member filters to the exact member in the combo boxes.

NOTE: If you choose **Formula Filter** and you use the cube view to create a formula, the initial formula scope will match the filters in the cube view. However, it is possible to expand the formula scope directly in the formula editor. The cube view will act simply as a template to start from when creating the formula, while the resulting formula can span a larger dataset than what was included in the cube view.

- b. **Parameter Filter**: Sets the selected dimensions to run-time parameters. You are prompted to select a member after opening the cube view.
- c. **POV Bar**: Uses the correct POV pane selections.



- 4. Click **Continue**. A dialog box opens to state that you successfully created the cube view.
- 5. Click OK.

The Formulas page provides the ability to manipulate amounts of data using a data-driven interface. Formula writing allows for the selection of cells from a single cube view or multiple cube views to be referenced in the actual calculation. Model Maker allows you to preview, save or delete formulas based on your specific needs. When a cube view is selected for formula writing, you can add or remove an account to the selected cube view.

Add Formulas to the Model

Your cube view setup and settings dictate how you will be able to use the cube view in formulas.

Your cube view appears in your Cube View 1 drop-down list if:

- The cube view contains the account dimension in either the row or column.
- Upon materialization of the cube view, all dimensions were set to formula filter.

When using two cube views for formula writing, the right panel only lists cube views created in Model Maker. Cube View 1 is set to cube views created in the specific model cube selected.

NOTE: If you create a cube view outside Model Maker, the cube view will not appear in the Cube View 2 list on the Formula page.

NOTE: You cannot add formulas to inherited members in your OneStream

application.
NOTE: You cannot write formulas against a parent member.

Open the Formulas Page

- Click Launch Account Formula Builder Page to open the Formulas dashboard. By default, in Model Cube the model you chose previously is selected.
- 2. In Cube View 1 select a cube view.

GolfStreamApp - Corporate	odel Cube Cube View 1	
Image: Second system F1_CustomersNumber F2_AdsDrivers Image: Second system F3_MonthlySubscription F4_Revenues F5_Servers F6_ServersCost	olfStreamApp - Corporate	•
F1_CustomersNumber F2_AdsDrivers F3_MonthlySubscription F4_Revenues F5_Servers F6_ServersCost	0 R 🗎 🕼	i
F2_AdsDrivers F3_MonthlySubscription F4_Revenues F5_Servers F6_ServersCost	F1_CustomersNumber	
F3_MonthlySubscription F4_Revenues F5_Servers F6_ServersCost	F2_AdsDrivers	
F4_Revenues F5_Servers F6_ServersCost	F3_MonthlySubscription	
F5_Servers F6_ServersCost	F4_Revenues	
F6_ServersCost	F5_Servers	
	F6_ServersCost	
F7_SalariesDrivers	F7_SalariesDrivers	
		-

Prior to creating formulas, if you have created cube views that should contain driver information, you can add that data through the formulas page.

Enter data into the white cells that indicate valid intersections of the cube view and click **Save**. The example below shows the number of customers that are FreeUsers and PremiumUsers.

Formulas New	• 🧷 Ed	t CustomersNumber Formula
Model Cube	Cube View	I
GolfStreamApp - C	orporate F1_Custor	nersNumber 🔹
Sa	ve stomersNumber	
TotalUsers		
FreeUsers	10,000.00	
PremiumUsers	1,000.00	

Additional drivers that help calculate the AdsRevenue is the AdsDrivers. The example below shows the populated data for average advertisement views, click through rates, view value and click value.

Formulas New	 Edit Avg/ 	dsViews Formula		
Model Cube GolfStreamApp - Corporate	Cube View 1 F2_AdsDrivers		•	
FreeUsers				
AvgAdsViews	350.00			
ClickThroughRate	0.01			
ViewValue	0.01			
ClickValue	0.10			

You have established your data drivers. The next section will create the AdsRevenue formulas using the Revenue cube view. See "Create a Formula" below.

Create a Formula

- 1. Select any cell within your cube view where your formula will be required.
- 2. Click the button next to Edit Formula. Notice that in the example below Edit Formula updates to the column selected, AdsRevenues.

Formulas New	Edit AdsRevenues Formula		
Model Cube GolfStreamApp - Corporate	Cube View 1 Edit AdsRevenues Formula	-	
🖩 I O H I 🖻 🕼			
🕺 💩 FreeUsers	PremiumUsers	TotalUsers	
AdsRevenues			
SubRevenues			
Operating Sales			

3. A formula editor opens below the formulas dropdown list that allows you to see the formula filters and edit the formula if needed.

The formula to the left of the = sign will populate initially based on the first cell defaulted on the cube view. If you select a different cell and click Edit Formula again, the formula will update to the left of the = sign to reflect the selected cell.

If you change the dimension filter, the formula will update based on your new criteria.

mulai New		• 🖉 tak	dsRevenues Fo	mula													
04	C#	94	14	44	 14	0#		914	60#	104	048	154	104	6.74	104		
hanghai_05App	Lecal	mim_BudgetV2_05	## 2022M1	Periodic	None	BeforeAdj.Booe	None	None	GolfhackerApp	US.		None	None	None	None		
levenue(1044)	neeUsens)																
t Advienences, P	ormula No	mer, Model Golfste	amApp, Paris Fr	interfactoria.1													
Cube		Cube View 1															
reamApp - Corpo	rate	 Ni,Revolue 	1		• 9	>											
OHIB																	
A free	Quers.		eniumUsers		stalitiers												
bhererues -																	
lubflevenues																	
erating Sales																	

When the formula editor opens, a few items will default for each dimension. These dimension filters are calculation filters representing all the dimensions on which the formula will run without any relevant change. These represent the scope for this formula.

64	C#	S#	TR	V#	A#	F#	0#	18	U1#	U2#	U3#	U4#	U5#	U6#	U7#	08#
mlm_Shanghai_GSApp	Local	mlm_BudgetV2_GSApp	2022.8ase	Periodic		None	BeforeAdj.Base	None	None	GolfTrackerApp	Top.Base		None	None	None	None

4. Click any dimension icon to open a Member Builder dialog box. In this example, the modeler clicked U4#.

💋 Member Builder			Û	□ ×
	Select Member			
Select Member Expansion		•		
FreeUsers				
		OK	Ca	ancel

5. Click Select Member. The Select Member dialog box opens.



6. Choose a member from within the UD4 dimension type and click **OK**.

In this example the formula updated to consider FreeUsers from the dimension filter and is not directly noted to the left of the = sign. Also, the modeler modified T# to reflect 2022.Base instead of 2022M1. The cube view is fixed, so you would not see the updates in the cube view itself. However, it is part of the formula. To see the results, create a variation of the cube view to analyze the full year as opposed to focusing on 2022M1.

(A	CR	58	TR	V#	A.R	F#	0#	18	Ute	U2#	U3#	U4F	US#	UGR	U7#	UBR
mlm_Shanghai_GSApp	Local	mlm_BudgetV2_GSApp	2022.8ase	Periodic		None	BeforeAdj.Base	None	None	GolfTrackerApp	Top.Base	FreeUsers	None	None	None	None
A#AdsRevenues =																
Account: AdsRevenues, Fo	ormula N	ame: , Model: GolfStreamA	pp, Pass: Form	nulaPass1												

 To incorporate data drivers from another cube view, see "Open a Second Cube View" below.

Open a Second Cube View

 To incorporate data drivers from another cube view, click 2 Cube Views located on the right side of the cube view. A list for Cube View 2 displays all cube views that have been created in Model Maker.

Model C	alter .			Cube Ve	ne 1	-
Gelfse	eamApp -	Corpora	fe *	14,80	enves	• •
H 1	OH	1.0	0			
	4	Freetu	isensi		PremiumUsers	TotalUsers
Ad	Anner	-				
Sul	(Annual	1				
Ope	ating Sale	*6				

2. Select your desired cube with driver information, highlight the cell that contains the data you need, and click **Update Formula**.

formular New	• 🧷 Edit Formula							6 🕞	×
64 C4	54 54 54	A# ## O# 1# 1/1	e 02e	0.04	USP USP	004 0	De Ube		
mim_thanghai_05App Local	mim_Budgetv2_05App 2022.8ase Periodi	I None BeforeAdjillace None No	e Colffiada	hpp Topilaca	FreeUters None	None No	Ine None		
ARAD/RevenueCUDRAE =									
Account Adofevenues, Formula	Name Adultex, Model: Golf@teamApp, Pass Formu	laffess1							
Model Cube	Cube View 1		Account	Cube View 2			2		
GolfStreamApp - Corporate	 H4,Revenues 	. 🛛	00	FI_Customershur	iber	•	<u> </u>		
8 I O H I B B			0 X	I O H			Update Formula	0 🛛	
A Pretibers	PremiumUsers	TotalUses		A 1	Customershumber				
Addrevenues				TotalUsers		11,000.00			
Subfeverues				FreeLisers		10,000.00			
Operating Sales				PremiumiUsers		1,000.00			
									12
									1

NOTE: Toggling between the 2 Cube View and 1 Cube View icons will change the user interface to show either 1 or 2 cube views.

3. Enter *, +, /, or - and add more cells to complete the formula.

A#AdsRevenues = A#CustomersNumber

4. As you add more cells to the formula, you will see that the account formula changes based on the relationship between the dimensionality of cube view 1 and cube view 2.

A#AdsRevenues:U3#All:U4#FreeUsers = A#CustomersNumber:U4#FreeUsers * A#AvgAdsViews:U3#None:U4#FreeUsers * A#ViewValue:U3#None:U4#FreeUsers

 Continue to add data into the formula from as many cube views as you need. The image below shows that the modeler added a second half of the formula using the F2_ AdsDrivers rates for FreeUsers.

64	68	51	TR	V#	A8	64	0#	18	U1#	U2#	U3#	U4F	US#	U6#	U7#	U8#
mlm_Shanghai_GSApp	Local	mlm_BudgetV2_05App	2022.8ase	Periodic		None	BeforeAdj.Base	None	None	Golffracker/	App Top.Base	FreeUsers	None	None	None	None
A#AdsRevenues.U3#All	= A#Custo	mersNumber * A#AvgAds	Views:U3#No	ne "												
Account: AdsRevenues, Fi	ormula Nar	me: , Model: GolfStreamA	pp, Pass: Form	ulaPass1												
Model Cube		Cube View 1				~				Account	Cube View 2					
GolfStreamApp - Corpor	rate	 F4_Revenues 			•	\odot				$\odot \Theta$	F2_AdsDrivers				•	2
BIO HID	0									0 🔊	BIOR	100				Update Formula
in Free	Users	Premi	mUsers		Total	isers						8 FreeUser	5			
AdsRevenues											AvgAdsViews			35	0.00	
SubRevenues											ClickThrough	Rate			0.01	
Operating Sales											ViewValue				0.01	
											ClickValue			-	0.10	

 Model Maker will read the dependencies within your formula script and identify the formula pass within the highlighted area below. Since there are no dependencies in this example, Pass: FormulaPass1 is shown.

_												
1	Formulas AdsRev		🔹 🧷 Edi	t 'AdsRevenues' Form	iula							
[E#	C#	S#	T#	V#	A#	F#	O#	#	U1#	U2#	U3#
	mlm_Shanghai_GS/	App Local mlr	m_BudgetV2_G	SApp 2022.Base	Periodic	1	None	BeforeAdj.Base	None	None	GolfTrackerApp	Top.Base
	A#AdsRevenues:U3 A#ClickValue:U3#N	8#All:U4#FreeUsers Ione:U4#FreeUsers	= A#Custom	nersNumber:U4#Free	Users * A#	#AvgAd	sViews:	U3#None:U4#Free	Users *	A#View	Value:U3#None:U4	#FreeUsers
,	Account: AdsRevenu	ues, Formula Name:	: AdsRev, Mode	l: GolfStreamApp, Pas	ss: FormulaPa	ass1						
1	Model Cube		Cube View 1				~					
	GolfStreamApp - C	orporate	 F4_Revenu 	ies		•	$\langle + \rangle$					
	ã	FreeUsers		PremiumUsers		TotalU	lsers					
	AdsRevenues		38,500.00					38,500.00				
	SubRevenues				2,990.00			2,990.00				
	Operating Sales		38,500.00		2,990.00			41,490.00				

 When your formula is complete, you can preview the results prior to saving. Refer to "Preview the Formula" below.

Preview the Formula

The preview allows you to see the data that the formula will return, based on your specific dimension filters, without running a calculation.

1. Click **Preview Formula**. The Results Preview opens.



It contains a data table as shown below. In this example, time is calculated for all months instead of 2022M1 and UD4 shows results for FreeUsers only.

a	Preview																			0 0
1	Ø							Results	Preview											
0	eg a column hea	der and drop it here to	proup by th	at column																
	Cube 7	Entity 7	Parent 7	Consolidation 7	Scenario T	Time 7	View 7	Account 7	Flow T	Origin 7	10.7	UD1 7	UD2 7	UDS 7	UD4 7	UD5 T	UD6 7	UD7 7	UDS 7	Amount T
	CollibramApp	mim_Shanghai_OSApp		USD	mim_BudgetV2_05App	2022M1	Periodic	Addevenues	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	CollStreamApp	mim Shanghai, OSApp		USD	mim_BudgetV2_05App	2022M1	Periodic	Addresences	None	Forms	None	None	GelffrackerApp	Other Asia	FreeUsers	None	None	None	None	43,120.00
	CollStreamApp	mim, Shanghai, OSApp		USD	mim_BudgetV2_05App	2022M1	Periodic	Addevenues	None	Forms	None	None	GolffrackerApp	us	FreeUsers	None	None	None	None	38,500.00
	GolfStreamApp	mim_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022M2	Periodic	Addresences	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	GolfsbreamApp	mim_Shanghai_CSApp		USD	mim_BudgetV2_GSApp	2022M2	Periodic	Addresences	None	Forms	None	None	GolffrackerApp	Other Asia	FreeUsers	None	None	None	None	43,120.00
	ColfstreamApp	mlm_Shanghai_CSApp		USD	mim_BudgetV2_G5App	2022M2	Periodic	Addevenues	None	Forms	None	None	GolffrackerApp	us	FreeUsers	None	None	None	None	38,500.00
	GolfStreamApp	mim_Shanghai_CSApp		USD	mim_BudgetV2_G5App	2022M3	Periodic	Addavanues	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	GolfStreamApp	mim_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022M3	Periodic	Addresences	None	Forms	None	None	GolffrackerApp	Other Asia	FreeUsers	None	None	None	None	43,128.00
	GolfStreamApp	mlm_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022M3	Periodic	Addrevenues	None	Forms	None	None	GolffrackerApp	us	FreeUsers	None	None	None	None	38,508.00
	CollStreamApp	mlm_Shanghai_CSApp		USD	mim_BudgetV2_G5App	2022M4	Periodic	Addrevenues	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	ColfStreamApp	mlm_Shanghai_CSApp		USD	mim_BudgetV2_GSApp	2022M4	Periodic	Addressences	None	Forms	None	None	GolffrackerApp	Other Asia	FreeUsers	None	None	None	None	43,120.00
	GolfStreamApp	mlm_Shanghai_OSApp		USD	mim_BudgetV2_05App	2022M4	Periodic	Addresences	None	Forms	None	None	GolffrackerApp	4/5	FreeUsers	None	None	None	None	38,508.00
	GolfStreamApp	mlm_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022M5	Periodic	AdsRevenues	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	GolfStreamApp	mim_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022M5	Periodic	Addrevenues	None	Forms	None	None	GolffrackerApp	Other Asia	FreeUsers	None	None	None	None	43,128.00
	GolfStream/App	mim_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022M5	Periodic	Addresences	None	Forms	None	None	GolffrackerApp	us	FreeUsers	None	None	None	None	38,508.00
	GolfStream/pp	mlm_Shanghai_OSApp		USD	mim_BudgetV2_G5App	2022M6	Periodic	Addressences	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	GolfStream/pp	mlm_Shanghai_OSApp		USD	mim_BudgetV2_GSApp	2022/46	Periodic	Addressences	None	Forms	None	None	GolffrackerApp	Other Asia	FreeUsers	None	None	None	None	43,128.00
	GolfStream/pp	mlm_Shanghai_054pp		USD	mim_BudgetV2_GSApp	2022M6	Periodic	AdsRevenues	None	Forms	None	None	GolffrackerApp	US .	FreeUsers	None	None	None	None	38,500.00
	GolfStreamApp	mlm_Shanghai_65App		USD	mim_BudgetV2_GSApp	2022M7	Periodic	AdsRevenues	None	Forms	None	None	GolffrackerApp	Canada	FreeUsers	None	None	None	None	30,030.00
	GolfStreamApp	mim_Shanghai_05App		USD	mim_BudgetV2_05App	2022M7	Periodic	AddRevenues	None	Forms	None	None	GolffreckerApp	Other Asia	FreeUsers	None	None	None	None	43,120.00

- 2. After the formula is established, save the formula, and calculate to see results in the cube view.
 - a. Click Save Formula.
 - b. In the Save Formula dialog box, enter a name and click Continue.



c. Click Calculate.

Model Cube	Cube Viev	v 1	0
GolfStreamApp - Corporate	 F4_Reve 	nues	• <+>
📕 I O R I 🗎 💷			
Calculate FreeUsers		PremiumUsers	TotalUsers
AdsRevenues			
SubRevenues			
Operating Sales			

The formula is calculated.

- &	FreeUsers
AdsRevenues	38,500.00
SubRevenues	
Operating Sales	38,500.00

Add Multiple Formulas to One Account

Model Maker provides the flexibility of saving multiple formulas to one account.

- 1. Select the POV cell.
- 2. In Formulas, select New.
- 3. Add components to the formula and click **Update Formula**.
- 4. Click Save Formula.

Delete a Saved Formula

Delete formulas that are no longer relevant.

- 1. Navigate to the cell that contains the formula from your cube view.
- 2. Select the saved formula from the Formula drop-down list.
- 3. Click **Delete** and refresh your cube view.

Tormulan Addition		• 0 10	Addressence: For	nufa														8	6	ତ୍	×
14	C#	54	24	100	44	04		01#	0.24	00*	U.P.	0.5#	0.04	1/74	0.04						
mitri,Shanghai,OSApp	Local	mim_BudgetV2_0	CApp 2022.Base	Periodic	Non	e beforehijkere	None	None	Collinactarityp	Top.Basa		None	None	None	None						
ARAbilevenuestUDRABS ARCIdVIslueUDRNonet	U4RTreeUs U4RTreeUs	ers = APCuiton ers	wen/sumbersue/free	Users * A	AR-GRADIN	eni/USANone/UAATree	Chers *	APries	Nalves Diffione Cr	AfreeUsers	•	Custome	nhumbe	cij4#line#	Charts *	AAAugAdoleuns/J#NoneU4R1eeUsen	 APCIoR/Ihrough 	Rafe(U)#No	net)445	eei)ie	n -
Account: Adultevenues, Fo	ormula Na	me: Adulan, Modal	t GolfStreamApp, Pa	os Formulai	1228																
Model Cube		Cube Vew 1																	Act	aut .	
GelfStreamApp - Corpora	ute	 F4,Revenu 	es			9													•	Θ	
BIO HIB	0																		4		
A free	Users		PremiumUsers		TotalUser	5															
Addrevenues		34,500-00				34,590.00															
SubRevenues				2,990.00		2,990.00															
Operating Sales		38,500.00		2,990.00		41,490.00															

NOTE: Once a formula is deleted, the data will remain based on the last calculation.

Save the Formula

- 1. Click Save Formula.
- 2. Enter a formula name and click **Continue**.

rmula		Û	□×
AdsRev			
	Continue	Ca	ncel
	rmula AdsRev	rmula AdsRev Continue	rmula D AdsRev Continue Ca

Close the Formula Editor

Click Close Formula Editor.



Delete the Formula

Click Delete Formula.



Add an Account

Add an account to an existing cube view and assign the account type from the Add Account dialog box. The addition or removal of an account can only be performed on the left cube view, Cube View 1. In the following example, we inherit the account type that is a child member of Operating Sales.

- 1. Click Add Account. The Add Account dialog box opens.
- 2. Enter the following information:
 - Account Name
 - Account Description
- 3. Select an Account Type and click **Continue**.

Ø Add Accou		Û	□ ×	
Account Name	OtherRevenues			
Account Description				
Select Account Type	Inherit •			
		Continue	Car	ncel

The new account appears in the list.

'	, di	FreeUsers	PremiumUsers	TotalUsers			
	AdsRevenues	38,500.00		38,500.00			
	SubRevenues		2,990.00	2,990.00			
	OtherRevenues						
	Operating Sales	38,500.00	2,990.00	41,490.00			
ſ							

You can add formulas to the new account and save it. Going forward, the new account is included in your account dimension.

Delete an Account

- 1. Select an account from the list.
- 2. Click Remove Account.

NOTE: If there is data in the account, a message will ask if you want to delete the account.
Data Import

Model Maker has streamlined the data loading process for modelers. You can import large amounts of data via the Data Import page using a .csv file. Once the .csv file is in the correct format, you can upload the file to the OneStream File Explorer using the Import icon. Dimension members that default to None include: all UDs, IC, and Flow. Consolidation will default to Local. The only required columns needed for your .csv file import are Entity, Scenario, Account, and Time.

The OneStream application also has a Validate button that checks each line of data to ensure data quality.

Import Data

- Click Launch Data Import Page. If you selected a model cube, the Model Cube field will be pre-populated. If not, select the model into which you want to import data into from the drop-down list.
- 2. Click **Import** and select the external .csv file that contains the information to load. Once imported, you will receive confirmation that the file is in the OneStream File Explorer.
- 3. Once the file is imported, select it from the **File** drop-down list and begin mapping your columns to the dimensions to the left.

NOTE: If you have already used the file, the dimension mapping will populate for you.

Data Import

Model Cube GolfSt	•App - Corporate	Files	UsersCount.csv		•											
Entity	Entity •	Ę	≅ ⊗			UsersCount.csv										
Consolidation	•	Drag a column header and drop it here to group by that column														
Scenario	Scenario 🔹	Er	ntity 🔻	CostCenter Y	Product T	Region 7	Account T	Customer 🔻	Time 🔻	Scenario 🔻	Amount T					
Time	Time •	m	ilm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M1	mlm_BudgetV2_APP	1000					
View	•	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M2	mlm_BudgetV2_APP	1000					
Account	Account •	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M3	mlm_BudgetV2_APP	1000					
Flow	-	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M4	mlm_BudgetV2_APP	1000					
Origin	-	m	nlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M5	mlm_BudgetV2_APP	1000					
ic.		m	ilm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M6	mlm_BudgetV2_APP	1000					
IC .	•	m	ilm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M7	mlm_BudgetV2_APP	1000					
UD1	CostCenter •	m	llm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M8	mlm_BudgetV2_APP	1000					
UD2	Product •	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M9	mlm_BudgetV2_APP	1000					
UD3	Region •	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M10	mlm_BudgetV2_APP	1000					
UD4	Customer •	m	llm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M11	mlm_BudgetV2_APP	1000					
LID5		m	llm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	PremiumUsers	2022M12	mlm_BudgetV2_APP	1000					
000		m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	FreeUsers	2022M1	mlm_BudgetV2_APP	10000					
UD6	•	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	FreeUsers	2022M2	mlm_BudgetV2_APP	10000					
UD7	•	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	FreeUsers	2022M3	mlm_BudgetV2_APP	10000					
UD8	•	m	lm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	FreeUsers	2022M4	mlm_BudgetV2_APP	10000					
Amount	Amount •	m	llm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	FreeUsers	2022M5	mlm_BudgetV2_APP	10000					

4. Once the mapping is defined , click **Validate**.

NOTE: Validate ensures that all members in the file are part of your model cube and saves the fields and dimension mapping of the file. If you have members on the .csv file that are not part of your model, you will receive a message and the data will not load for those specific members.

🛱 🗞 UsersCount.csv												
Drag a column header and drop it here to group by that column												
Entity T	CostCenter Y	Proc	duct 🔻	Region Y	Account T	Custome	r Y	Time 🔻	Scenario			
mlm_Shanghai_APP	None	Gol	Tracker Ann		CustomoreNlumbor	Dromium	Users	2022M1	mlm_BudgetV			
mlm_Shanghai_APP	None	Gol	(J) Exten	sible Finano	ce L		Jsers	2022M2	mlm_BudgetV			
mlm_Shanghai_APP	None	Gol	All check	succeeded	and dimension map	ping	Jsers	2022M3	mlm_BudgetV			
mlm_Shanghai_APP	None	Gol	saved.				Jsers	2022M4	mlm_BudgetV			
mlm_Shanghai_APP	None	Gol					Jsers	2022M5	mlm_BudgetV			
mlm_Shanghai_APP	None	Gol		mlm_Budget\								
mlm_Shanghai_APP	None	Golf	fTrackerApp	US	CustomersNumber	Premium	Users	2022M7	mlm_BudgetV			
mlm_Shanghai_APP	None	Golf	fTrackerApp	US	CustomersNumber	Premium	Users	2022M8	mlm_BudgetV			

5. When validation is complete, click **Load**. When load is complete, you will get confirmation on the number of records that have successfully imported to your model.

NOTE: Load only displays after you click **Validate** and the validation was successful. You must validate before loading.

Drag a column header and drop it here to group by that column													
Entity T	CostCenter Y	Product T	Region 7	Account T	Custome	r Y	Time T	Scenario T	Amount Y				
mlm_Shanghai_APP	None	GolfTrackerApp	LIC	CustomoreNlumber	Dromium	Jsers	2022M1	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	Gol (J) Exten	sible Financ	ce L		Jsers	2022M2	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	Gol Records I	oaded: 192			Jsers	2022M3	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	Gol			2022M4	mlm_BudgetV2_APP	1000						
mlm_Shanghai_APP	None	Gol				Jsers	2022M5	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	Gol			OK	Jsers	2022M6	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	Premium	Users	2022M7	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	Premium	Users	2022M8	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	Premium	Users	2022M9	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	Premium	Users	2022M10	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	Premium	Users	2022M11	mlm_BudgetV2_APP	1000				
mlm_Shanghai_APP	None	GolfTrackerApp	US	CustomersNumber	Premium	Users	2022M12	mlm_BudgetV2_APP	1000				

6. Repeat the previous steps to load more files.

If a dimension is not mapped to any column, OneStream will use the default of None for all UDs, IC, and Flow dimensions. If Consolidation is not mapped, it will use the default of Local. If forms is not mapped, it will use the default of Origin.

7. To verify, review the data and the results of your calculations. See "Review" on page 79.

Data Export

Leverage extensibility to automatically integrate the newly created model to the corporate standard model.

Select the portion of data to synchronize and choose one of the following options:

- **Preview**: Allows you to preview your export prior to generating transformation rules or any other data source.
- Save Connect: Create a connector or mapping of your model.
- Save Link: Link it directly to the corporate model by generating a data management job.
- **Export to File**: Export the result to a .csv file for use by other systems.

Model GolfStrApp - Corporate	Cube	Ŧ	Scenario Select Target Scenario		Preview	. Save Connect	Save Link	Export To File
Entity		UD1						
Consultation	Dimension			 Dimension				
	Dimension			 Dimension				
Scenario	Dimension	UD3		 Dimension				
Time		UD4						
View	Dimension			 Dimension				
	Dimension			 Dimension				
Account	Dimension	UD6		 Dimension				
Flow		UD7						
Origin	Dimension	UD8		 Dimension				
	Dimension			 Dimension				

NOTE: Performing any of the above actions will not directly impact your corporate model immediately. If you choose to use Save Connect or Save Link to export your edge case, additional steps external to Model Maker are necessary to incorporate into your corporate plan and can only be done by those who have the appropriate security permissions. Export to File will allow you to share your edge case without impacting your corporate model.

Export Data

- Click Launch Data Export Page. If you selected a model cube, the model cube field is pre-populated. If not, select the model from which you want to export data. This will be the source of all the information you want exported into your corporate application.
- 2. Select a cube from the drop-down list, which contains all the models available in your OneStream application. Select the cube in which you want to add model information.
- Click Select Target Scenario. The target scenario is in the target cube you selected. The Select Member dialog box opens.

ODEL MARTR	cha Somain	0 0
GoffStreamApp - Corporate	GolfStream - Corporate Select Target Scenario	16 - 9 L L
Filters		Preview Save Connect Save Unix Export to n
entes Entity	D Select Member	
Consolidation	Cube Golfbream Comension Type Stemario	
* + Scenario	Currension Scenarios • Currension Scenarios • Currension Currension	
	E None - E Actual gal	
a import View	ElisadgerV2 Elisadger	
a toport	E Other Somalios Construction Construction Construction Construction Construction Construction	
niew E	- 12 AcquistionAcadel, M3Fot	
Origin	Example Example Example	
ĸ	Cimension	

4. Select your scenario and click **OK**.

Select Dimension Filters

All dimensions that could be included in a model are provided in Filters on the Data Export page. Here you have the flexibility of adding text freehand or using a Member Builder dialog box to identify filters applicable to your edge model.

1. Select dimension filters by clicking the ellipses. The Member Builder dialog box opens to guide you to select the filter for each dimension.

There is a relationship identifier for each dimension when comparing the Model Maker model to your selected target cube. See "Dimension Filters" on page 77 for more information.

Filters		
Entity Entity Dimension	UD1	Extended Dimension
Consolidation	UD2	Extended Dimension
Scenario	UD3	Extended Dimension
Time Shared Dimension	UD4	Extended Dimension
View Shared Dimension	UDS	Extended Dimension
Account Extended Dimension	UD6	New Dimension
Flow Extended Dimension	UD7	New Dimension
Origin Shared Dimension	UD8	Extended Dimension
IC Shared Dimension		

NOTE: If a dimension is not being used in your model, the default is None.

2. Click Select Member.

Model GolfStrApp - Corporate	Cube Austin - Austin Apparel	Scenario Budget Group' selected
Filters		
Entity	Entity Dimension 🕥 Member Builder	UD1
Consolidation	Shared Dimension	Select Member Unrelated Dimension
Scenario	Select Member Expansion	Extended Dimension
Time	Shared Dimension	OK Cancel Unrelated Dimension
View	Shared Dimension	UD5 Extended Dimension
Account	Extended Dimension	UD6 Unrelated Dimension
Flow	Extended Dimension	UD7 Unrelated Dimension
Origin	Shared Dimension	UD8 Extended Dimension

3. Navigate the hierarchy or use the Search to select an entity dimension and click **OK**.

The Member Builder dialog box populates with your selection.

💋 Member Builder				Û	□ ×
Selec	t Member				
Select Member Expansion		•			
Shanghai					
			OK	Са	ancel

4. The filter populates with your selection.

Model	Cube
GolfStrApp - Corporate 🔹	GolfStream - Corporate
Filters	
Entity	
Shanghai	Entity Dimension
Consolidation	
	Shared Dimension
Scenario	
	Scenario Dimension
Time	
	Shared Dimension
View	
	Shared Dimension
Account	
	Extended Dimension
Flow	

5. Repeat the previous steps to assign other dimensions. The example below shows the dimensions populated specific to this use case.

MODEL M	AKER				0
Θ	Model GolfStreamlap - Corporate	Cube GolfStream - Corporate	Scenario * "Budgeth/2" selected		Preview Save Connect Save Link Export R
Þ	Filters				
Members	Shanghai	m Entity Dimension	UD1 Top:Base	Extended Dimension	
88	Consolidation Local	- Shared Dimension	UD2 Top-Base	- Estandad Dimension	
	Scenario min Buduet/2 dilace	Scenario Dimension	UD3 Teo Base	Latended Dimension	
Formulas	Time		004		
Cata Import	Vew	Shared Demansion	Top.8ase	an Estandad Demansion	
	Periodic Account	shared Dimension	None UD6	totended Dimension	
Carla Export	Income Statement.Base	- Extended Dimension	None	New Dimension	
Review	None	Extended Dimension	None	- New Dimension	
	Origin Teloro4dj.Base	- Shared Dimension	UD8 None	Extended Dimension	
	IC None	- Shared Dimension			

6. Click **Preview** to view the data as it will be exported.

\$2																			
ig a column hea	der and dro	p it here to	s group by that col	lumn															
Cube 7	Entity T	Parant ¥	Consolidation T	Scenario T	Time 🕈	View 7	Account Y	Flow Y	Origin 7	IC 7	UD1 7	UD2 🕴	UD3 🕈	UD4 T	uos T	UD6 Y	UD7 7	UD8 7	Amount
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022M1	Periodic	41000	None	Forms	None	IT .	Handheld	US	None	None	None	None	None	20625-00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M1	Periodic	50200	None	Forms	None	Exec	Handheld	None	None	None	None	None	None	5000.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M1	Periodic	50200	None	Forms	None	HR	Handheid	None	None	None	None	None	None	3600.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M1	Periodic	50200	None	Forms	None	Mitt	Handheid	None	None	None	None	None	None	5400.00000000000
GolfStreamApp	Shanghai		uso	mim_BudgetV2_GSApp	2022M1	Periodic	50200	None	Forms	None	it .	Handheid	None	None	None	None	None	None	15000.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022M1	Periodic	41000	None	Forms	None	IT .	Handheld	Canada	None	None	None	None	None	16087.30000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M1	Periodic	41000	None	Forms	None	IT	Handheld	Other Asia	None	None	None	None	None	23100.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M2	Periodic	41000	None	Forms	None	IT .	Handheid	US	None	None	None	None	None	20625-00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M2	Periodic	50200	None	Forms	None	Exec	Handheid	None	None	None	None	None	None	5500.0000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022M2	Periodic	50200	None	Forms	None	HR	Handheid	None	None	None	None	None	None	3960.0000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022M2	Periodic	50200	None	Forms	None	Mitt	Handheid	None	None	None	None	None	None	5940.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M2	Periodic	50200	None	Forms	None	IT .	Handheid	None	None	None	None	None	None	16050.00000000000
GolfStreamApp	Shanghai		uso	mim_BudgetV2_05App	2022M2	Periodic	41000	None	Forms	None	IT .	Handheid	Canada	None	None	None	None	None	16087.50000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022M2	Periodic	41000	None	Forms	None	it i	Handheid	Other Asia	None	None	None	None	None	23100.0000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022543	Periodic	41000	None	Forms	None	iT	Handheid	us	None	None	None	None	None	20625.0000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022543	Periodic	50200	None	Forms	None	Ехос	Handheid	None	None	None	None	None	None	5000.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_05App	2022543	Periodic	50200	None	Forms	None	HR	Handheid	None	None	None	None	None	None	3600.00000000000
GolfStreamApp	Shanghai		uso	mim_BudgetV2_05App	2022MB	Periodic	50200	None	Forms	None	Mit	Handheid	None	None	None	None	None	None	5400.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022MB	Periodic	50200	None	Forms	None	iff .	Handheid	None	None	None	None	None	None	15000.00000000000
GolfStreamApp	Shanghai		USD	mim_BudgetV2_GSApp	2022543	Periodic	41000	None	Forms	None	iT .	Handheid	Canada	None	None	None	None	None	16087.50000000000

7. OneStream pre-aggregates the data using extensibility and provides a data set, which is already mapped correctly to the cube.

Dimension Filter	Description
Entity	Specific to your target cube to which you are adding model information. Select a base entity. All other filters identify the dimension information from the source model, so the filters you choose will vary based on how your use case was built and the data that was applied to your model.
Shared	Indicates that the dimension is shared and a mask type transformation rule automatically generates once the export is complete. A pass-through rule may be generated and a star for the rule expression and target value is assigned depending on the dimension. This ensures data passes from the source model to the target cube for that dimension.
Scenario	Always unrelated and the mapping is treated as a one-to-one relationship.
Unrelated	Indicates that the information for this dimension is exported as a source and you must map manually. The information from the source model is not aggregated and the granularity of the information will remain.
New	Indicates that the dimension in the source model is not used in the target cube. The data in the new dimension used in Model Maker forces the information to aggregate in None in the target cube since that is the only valid area of OneStream to place data for that dimension.
Extended	Data will aggregate according to the hierarchical structure of the extended dimension.

Save a Connector

Use the dimension settings you configured as a connector for your cube.

Click Save Connect.

OneStream creates the following:

- A connector rule
- A data source with all of the dimensions
- Transformation rules for mapping

𝗊 Extensible Finance	Ó	ο×
Please use the followig Data Source and Transformation Rules for your target import workflow step Connector Rule: Connector Business Rule MME_ConnectorTemplate_GolfStreamApp_GolfStream_BudgetV2 updated Data Source: Data Source MME_GolfStreamApp_GolfStream_BudgetV2 updated Transformation Rules: Mapping MME_GolfStreamApp_GolfStream_BudgetV2 updated		
		ОК

Everything you need to add the model to a workflow import process is created.

NOTE: The Connector Rule, Data Source and Transformation Rule naming conventions are prefixed with *MME_*.

When performing a data export on a model cube, any additional exports done on the same model cube will override transformation rules and connectors from the original export. Essentially each model cube exported will have one connector rule, one data source and one transformation rule for that group of data.

Review

Analyze the model with reports you created by choosing different screen layouts or combining private and public reports in a single report page.

The Review page of Model Maker provides a dashboard area to review models with others. You can view two models in a horizontal or vertical format.

Review Model Data

- 1. Click Launch Cube View Review Page.
- Select a model cube if one is not selected. If you already selected a model cube, the model cube field is pre-populated.
- 3. In Cube Views Layout, select one of the following:
 - 1 Cube View
 - 2 Cube Views (Vertical)
 - 2 Cube Views (Horizontal)
- 4. Select 1 Cube View.
- 5. In Cube View 1, select a cube view. The cube views in this drop-down list are specific to your selected model cube.

Model Cube GolfStrApp - Corporate •						
Cube Views Layout 1 Cube View Cube View 1 R1_IncomeStatement						
8 I O H I D 0						¢
	Jan 2022	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022
Income Statement						
Net Income	31,508.50	31,508.50	31,508.50	31,508.50	31,508.50	
Earnings Before Taxes	31,508.50	31,508.50	31,508.50	31,508.50	31,508.50	
Earnings Before Interest and Taxes	31,508.50	31,508.50	31,508.50	31,508.50	31,508.50	
Total Operating Income	31,508.50	31,508.50	31,508.50	31,508.50	31,508.50	
Gross Income	60,508.50	60,508.50	60,508.50	60,508.50	60,508.50	
Net Sales	120,321.00	120,321.00	120,321.00	120,321.00	120,321.00	
Operating Sales	120,321.00	120,321.00	120,321.00	120,321.00	120,321.00	
AdsRevenues	111,650.00	111,650.00	111,650.00	111,650.00	111,650.00	
SubRevenues	8,671.00	8,671.00	8,671.00	8,671.00	8,671.00	
IC Sales						
Returns & Allowances						
Other Outside Sales						
□ Cost of Goods Sold	59,812.50	59,812.50	59,812.50	59,812.50	59,812.50	
Operating Cost of Goods Sold	59,812.50	59,812.50	59,812.50	59,812.50	59,812.50	
ServersCost	59,812.50	59,812.50	59,812.50	59,812.50	59,812.50	
IC Cost of Goods Sold						
Total Operating Expenses	29,000.00	29,000.00	29,000.00	29,000.00	29,000.00	

 (Optional) If you chose 2 Cube Views, select Cube View 2. The Cube View 2 drop-down lists all cube views created in Model Maker.

MODEL M	AKER						\$	0
REVIEW	Model Cube GolfStrApp	- Corporate						-
	a a a a a a a a a a a a a a a a a a a		· · · · · · · · · · · · · · · · · · ·					
Models	Cube Views Layout 2 Cub	e Views (Horizon Cube	View 1 F8_Salaries	Cube View 2 F7_Salari	esDrivers •			
ю		C					¢,	2
	ã	Human Resources	Infrastructure	Development	Executive	Marketing		
Members	Base	3,600.0	5,000.00	10,000.00	5,000.00	5,400.00		
	AppEmployeesSalary	3,600.0	5,000.00	10,000.00	5,000.00	5,400.00		
Views								
×-								
Formulas								
ا کا								
Data Export								
		Q.					<u>م</u>) æ
Review	<i></i>	Human Resources	Infrastructure	Development	Executive	Marketing		
	EmployeesDrivers							
	AvgEmployeeSalary	1,800.00	2,500.00	2,000.00	5,000.00	1,800.00		
	NoEmployees	2.00	2.00	5.00	1.00	3.00		
Dashboard -	Moc New							

Help and Miscellaneous Information

(?) This page contains solution documentation.

Display Settings

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

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

Package Contents and Naming Conventions

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

Example Package Name: MLM_PV6.8.0_SV100_PackageContents.zip

Identifier	Description
MLM	Solution ID
PV6.8.0	Minimum Platform version required to run solution

Identifier	Description
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.

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.

Appendix A Security

Solution Security

Below is a matrix that represents the high-level solution security upon install of the Model Maker solution. We strongly encourage administrators to create a security group called Model Maker as mentioned in "Global Options" on page 8. The Model Security section represents what a user is able to modify upon security level access on the model in a more granular level.

High level

	CONS	ans sroup
	NGESSE	Maintel
	V	\$
Upon installation (Global Settings Access Group)	Administrators	Administrators
Model Maker Dashboard Maintenance Units:		
Models	Administrators	Administrators
Members	Administrators	Administrators
Views	Administrators	Administrators
Formulas	Administrators	Administrators
Data Import	Administrators	Administrators
Data Export	Administrators	Administrators
Review	Administrators	Administrators
Model Maker Dashboard Maintenance Profile:		
Model Maker	Administrators	Administrators
Change Access Group to Model Maker (Global Settings)	Model Maker	Administrators
Model Maker Dashboard Maintenance Units:		
Models	Model Maker	Administrators
Members	Model Maker	Model Maker
Views	Model Maker	Administrators
Formulas	Model Maker	Administrators
Data Import	Model Maker	Administrators
Data Export	Model Maker	Administrators
Review	Model Maker	Administrators
Model Maker Dashboard Maintenance Profile:		
Model Maker	Model Maker	Administrators

NOTE: The Model Maker security group is comprised of child groups containing administrators and non-administrators (power users).

Model Security

	PUDIE	Offer
	Ŷ	(any security group within the Access Group
MODEL PAGE:		in Global Options)
 Modify Model Cube Definition	no	no
Create Model Cube	no	no
Copy Model Cube	yes	yes
Remove Model Cube	*no	*no
MEMBERS PAGE:		
Modify existing Parent members	no	no
Delete existing members	no	no
Add members to hierarchy	yes	yes
Delete or modify added members	yes	yes
VIEWS PAGE:		
Open saved filters used/created in model cube	no	no
Create new cube view	yes	yes
FORMULA PAGE:		
Created by original modeler:		
Use existing cube view	yes	yes
Edit formulas in cube view	yes	yes
Remove formulas in cube view	yes	yes
Create new formulas in cube view	yes	yes
Additional edits:		
Create new formulas in cube views	yes	yes
Save new formulas in cube views	yes	yes
Delete new formulas created by public user in cube views	yes	yes
DATA IMPORT:		
Overlay or change data on a created cube view	yes	yes
DATA EXPORT:		
Generate Connector	yes	yes
Generate Data Management Job	yes	yes
Export to File	yes	yes
<u>REVIEW:</u>		
Review and edit all cube views created in shared Model Cube	yes	yes

Public: Open to the Security group and its child groups assigned in Global Settings.

Private: Only the administrator or modeler who created the model cube can modify it.

Other group: A modeler can only view or copy a cube that is available to them.