

OneStream XF Version 4.5.0

Release Notes

OneStream XF version 4.5.0 is a minor release with a minimal amount of enhancements and resolutions to reported issues. This includes support for SAML 2.0 Single Sign-On (SSO) authentication for user authentication and an enhancement for Extensible Documents for working with Microsoft Office Update Version 1804 or higher. These Release Notes list the changes in OneStream XF, other changes in XF MarketPlace solutions during this timeframe and includes an Upgrade Guide.

Release Date: October 24, 2018

- OneStream XF Version 4.5.0 Release Notes 1
 - Important Notes..... 1
 - OneStream XF 1
- OneStream XF MarketPlace Updates..... 4
- OneStream XF 4.5.0 Upgrade Guide 6

Important Notes

Prerequisites

See section of this document entitled *OneStream XF 4.5.0 Upgrade Guide* for important notices and details regarding planning your upgrade. Also refer to *OneStream XF version 4.4.1 Release Notes* if upgrading from a previous release.

Compatibility

See the *OneStream XF 4.5.0 Upgrade Guide* later in this document for information on compatibility of the OneStream Studio and OneStream Excel Add-in versions.

OneStream XF

New

Security

- Added external authentication support for the SAML 2.0 SSO authentication protocol. See OneStream XF Installation and Configuration Guide for details and an example of configuration for Active Directory Federation Services (ADFS). (8446)

Presentation

- Improved the Excel Add-In’s Refresh Worksheet and Refresh Workbook performance by adding the “Use Minimal Calculation for Refresh” option in Preferences. When set to True (the new default setting), this option will only collect data for the XF cells that are on the selected worksheet or workbook. (9107)

- Enhancement to Excel Add-In was added to account for a known Excel situation when running on certain touchscreen hardware. If the “Refresh Sheet” or “Refresh Workbook” is pressed but the cells containing XF functions do not complete their calculations when processed, change the “Disable Interactive User During Refresh” setting under “Preferences” to True. (2656)
- Enhanced Excel Add-In feature of Save Offline Copy by adding an option in the Preferences to Retain All Formatting when Saving Offline. For better performance, set this to False. (8600)

Changed

Presentation

- Enhanced Extensible Documents that are authored (in Microsoft Word, and Microsoft PowerPoint) to support recent Microsoft Office updates (versions 1804 or higher). The Alt Text Description field for Picture controls will be used instead of the combination of Alt Text Title and Description in previous versions. Pre-existing Extensible Documents will still run if the XF required settings are in the Alt Text Title field and the XF optional settings are in the Alt Text Description field (per the original design). (8881)

Workflow

- Improved performance when saving and submitting data in a Workflow with thousands of Workflow Profiles. (9039)

Known Issues

- Report Preview Error in Cube View Sharing Rows/Columns with same Name in Shared Cube Views. (2651)
- When exporting or sending an image via an email from Spreadsheet or Text Editor, the options for Subject Field or Page Border Field are cut off in the Export Document dialog box. (5394, 5395, 5396, 5397)
- When opening a Workbook that contains OneStream Formulas/Cube Views/Quick Views directly from the file system before opening a blank Excel workbook and logging into the OneStream Excel Add-In, the user may receive a “Cannot run the macro ‘XFInternalSetConnectionInfo’ error. As a workaround, the user can open Excel, log in and then open the XLSX file, or they can launch the file from within OneStream if it is in the File Repository. (5024)
- Error message received in very specific situation when closing Print Preview in Spreadsheet and Text Editor after the user had previously selected Page Layout/Two Pages, and then selected Show Cover Page. (5738)
- In order to have SSL security configured between the OneStream Application and Web Servers, Application Pools must use a local administrator account rather than a domain account. (4603)
- In Spreadsheet, when editing a formula using the Function Arguments dialog, a reference to a Named Range that exists on a different tab will result in an error. As a workaround, edit the formula in the Formula Bar or only use the Function Arguments dialog to reference Named Ranges that exist on the same sheet. Planned for next major release. (5834)
- When printing in the Spreadsheet Feature and selecting the Page Range option of Current, all pages are printed, not just the current page. (5877)
- Business Rule which contains a ~ with passed parameters will only run when the user running it has a Culture Code set to English. Workaround is to use a different parameter separator other than ~ in rules for time being. Planned for next major release. (5958)
- Rendering of a Dashboard that contains a Map Component results in an error only when using OneStream App for Windows. This error is not experienced with Map Components when using the browser version of OneStream XF. Planned for next major release. (5974)

- An apostrophe in the Name of a Confirmation Rule results in an error when re-loading into a OneStream XF Application after extract. As a workaround, refrain from using an apostrophe in Confirmation Rule names for the time being. (5975)
- When a cube view uses CVC/CVR, CVR seems to be "not valid" when one of the rows included in the CVR formula are suppressed. As a workaround use the method of using direct member lookups (for the rows that are using Math where there is suppression) and then doing math. (5943)
- SAML 2.0 does not initiate an authentication flow with a username and password from the service provider therefore Client API authentication with SAML 2.0 is not supported. This may limit the automation capabilities available. (9158).

Contacting Support

OneStream Support can be contacted at any time by first registering at our support site at <http://support.onestreamsoftware.com> and then emailing support@onestreamsoftware.com. To gain access to the XF MarketPlace, email OneStream Support.

OneStream XF MarketPlace Updates

The following updates were made to XF MarketPlace solutions since the OneStream XF 4.4.1 Release. Refer to the specific solution's release notes in XF MarketPlace for more details on these improvements.

New

Process Control Manager (PCM)

Process Control Manager (PCM) is a solution used to provide business users with an intuitive and easy to manage review and approval process of Workflow Submissions.

The included OneStream XF Workflow functionality is quite powerful and will meet the design requirements for most XF Applications. Process Control Manager expands upon this native functionality to allow additional granularity in process control and also adding the Cube, Origin dimension and detailed Workflow Channel control of Accounts, to provide focused process control in multifaceted workflow environments.

This solution provides a framework for enhanced control of Workflow data submissions by managing:

- Which Workflow users/security groups can input data or complete review steps
- Which Scenarios/Periods can be modified
- Which Origin dimension input channels can modify data
- Which Accounts can be modified based on their related phase (aka Workflow Channel)

Home Page Manager (HOM)

The Home Page Manager (HOM) solution is an administrator utility for managing the default OneStream Home Page for individual users and user groups. The solution allows the System Administrator to easily assign new users or manage current user access to default OneStream Home Page that is displayed at login to the application.

Process Blocker Utility (PBL)

The Process Blocker Utility (PBL) solution is used by administrators to temporarily prevent new Data Quality and Data Management processes from starting while the Process Blocker is activated. This allows administrators to complete OneStream XF application maintenance efficiently in environments where it is difficult to schedule outages because of the number of concurrent users working in multiple time zones. Attempts to start new Data Quality or Data Management process will be blocked and the users will receive a popup window with the application maintenance message. Administrators can complete their maintenance once the active tasks have completed. Normal processing will resume when the administrator unblocks the application after they complete their maintenance.

Changed

Account Reconciliations (RCM)

Maintenance and user improvement features. Revised and additional reports as well as report filters. Ability to export and import Reconciliation Inventory Items to Excel. Simple navigation of document attachment history. Over a dozen other enhancements.

Security Audit Reports (SAR)

This is a minor update to version SAR PV430 SV100 with updates to Business Rules to provide continued improvements to audit reporting. Related reports from Standard System Reports have been moved to this solution for simpler and central delivery.

Help Desk (HDK)

The theme of this PV440 SV100 release is incremental improvements including Email notification to ticket creator when ticket is closed, clearing closed date information when Closed ticket is Opened or Assigned, added slider to Ticket Editor—Update screen to help show Save button and supporting documents now open in associated viewing application when Download is selected.

OneStream XF 4.5.0 Upgrade Guide

This document provides an overview of OneStream XF's upgrade process when moving from an earlier OneStream XF release to 4.5.0. The anticipated audience for the upgrade process is Information Technology professionals responsible for installing, maintaining and supporting OneStream XF.

Review the following **OneStream XF 4.5.0 requirements prior to scheduling an upgrade** and any related notes in the ***OneStream XF Installation and Configuration Guide***, available on XF MarketPlace.

- 1.) If upgrading from OneStream XF version 4.1.x or earlier, OneStream updated to **.NET 4.7** to stay current on the latest version of the .NET Framework, which is required for Microsoft's security standards and for advanced features. Please note, Microsoft provides the .NET Framework 4.7 optional update through standard Microsoft Windows Updates.
- 2.) The most recent **database schema update** was 4.2.0. There is no need for a database schema update if upgrading from 4.2.x or 4.3.x to version 4.4.1. If upgrading from a version before 4.2.0, Database Schema updates must be implemented as part of the upgrade on every Application and Framework database. Full Database Backups are required.
- 3.) The 4.4.1 version of the **OneStream Studio** and **OneStream Excel Add-in** are not backward compatible with prior versions and must be updated. These either need to be uninstalled and reinstalled or use the Client Updater. See *OneStream XF Installation and Configuration Guide* for details under the section "Upgrade or Downgrade via OneStream."
- 4.) If upgrading from a version before 4.2.0, it is required that all OneStream Applications complete the **Compile All Business Rules and Formulas to Check for Syntax** process as part of the upgrade process.

Scheduling the Upgrade

It is recommended that this upgrade be performed by the OneStream Software Technical Support Team. Contact OneStream Technical Support to schedule this upgrade: support@onestreamsoftware.com.

Pre-Installation Upgrade Checklist

The checklist below details the items that should be completed prior to beginning the upgrade operation:

Step 1: Perform a full backup of all OneStream databases.

Step 2: App Pool Service Account must use an Administrator ID or be added to the Performance Monitors User Group and Performance Log Users Group.

Step 3: Download OneStream XF Installation Software from the OneStream XF MarketPlace

- 1.) Login to the OneStream XF MarketPlace and select **Software Download** in order to access the latest version of OneStream XF.
- 2.) Download the **Full Package** or **Server Software** to acquire the appropriate setup files for the server installation.

Step 4: Verify the Location of the OneStream XF Configuration Files

- 1.) On each OneStream server, navigate to the OneStream Server Configuration Utility (*Start > Programs > OneStream Software > Server Configuration Utility*)
- 2.) Right-click on the utility and select **Run as Administrator**
- 3.) Choose *File > Open ASP.NET Configuration File* and browse to *C:\Program Files\OneStream Software\OneStreamAppRoot\OneStreamApp* on application servers, or *C:\Program*

Files\OneStream Software\OneStreamWebRoot\OneStreamWeb, on web servers, and choose the **web.config** file

- 4.) The web.config will open and display the path to the corresponding configuration files:
XFAppServerConfig.xml and XFWebServerConfig.xml
- 5.) Take a copy of the config file
- 6.) Copy and paste the configuration file path in a place that is easily accessible as this will need to be re-entered following the upgrade process
- 7.) Close the file, and select **No** when prompted to save
- 8.) Close the OneStream Server Configuration Utility

Step 5: Verify the OneStream Service Account in Internet Information Services Manager (IIS)

- 1.) Service Account must be an Admin ID or in the Performance Log User and Performance Monitor Users groups.
This ID is necessary to use Queuing and CPU Monitoring.
- 2.) On each OneStream server, launch Internet Information Services Manager
(*Start > Control Panel > Administrative Tools > Internet Information Services (IIS) Manager*)
- 3.) Expand the server in the left pane and select **Application Pools**
This will display a list of application pools in the right pane. The OneStreamAppAppPool and OneStreamWebAppPool are displayed in the Identity column. Note this windows account and its password as this will need to be re-entered in IIS following the upgrade process.

Step 6: Verify OneStream Application Server with OneStream Database Configuration Utility Installed

On each OneStream application server, navigate to *Start > Programs > OneStream Software* and verify which application server has the OneStream Database Configuration Utility installed.

Step 7: Verify OneStream Application Server with OneStream Studio Installed (if applicable)

On each OneStream application server, navigate to *Start > Programs > OneStream Software* and verify which application server(s) has OneStream Studio installed. This will need to be re-installed on the application server during the upgrade operation.

Upgrading System Components

The following section describes the process used to upgrade the complete OneStream XF system.

Step 1: Stop OneStream Application Pools Prior to Uninstall

- 1.) On each OneStream server, launch Internet Information Services Manager
(*Start > Control Panel > Administrative Tools > Internet Information Services (IIS) Manager*)
- 2.) Expand the server in the left pane and select **Application Pools**
This will display a list of application pools in the right pane.
- 3.) Stop the **OneStreamAppAppPool** and/or **OneStreamWebAppPool** by right-clicking on each and selecting **Stop** (Note: Close any open OneStream Configuration Utilities)
- 4.) Repeat these steps for each server in the environment

Step 2: Uninstall the OneStream XF Servers Package

In order to upgrade to a new release, the previous software release must be uninstalled from all servers before the new release can be installed on each server in the environment.

- 1.) Navigate to *Control Panel > Programs and Features > Uninstall a Program* and locate the OneStream Servers component in the list

- 2.) Right-click on the **OneStream Servers component** and select **Uninstall**
- 3.) If OneStream Studio is also installed, locate the **OneStream Studio component** in the list, right-click and select **Uninstall**

Step 3: Re-Install the OneStream XF Servers Package on an Application Server

This is the primary OneStream XF installation package. This wizard based package is used to install a complete server setup which includes web server, application server, and all utilities. This can also be used to do a custom install which allows the user to pick and choose the appropriate components for the server type being built.

- 1.) Browse to the OneStream Servers package, right-click on **Setup.exe** and select **Run as Administrator** to execute the server installation package
- 2.) Click **Next** at the landing page and accept the License Agreement
- 3.) Select the **Custom** option and click **Next**
- 4.) Choose the installation directory where the software was previously installed and click **Next**
- 5.) Choose the **Application Server** and **Server Configuration Utility** on the **Select Features** page and click **Next**
Note: The Database Configuration Utility may also be chosen if the application server is the server where the software was installed in the previous version of OneStream XF.
- 6.) Click **Install** to install the software and click **Finish** when it is complete

Step 4: Re-Install the OneStream XF Servers Package on a Web Server

- 1.) Browse to the OneStream Servers package, right-click on **Setup.exe** and select **Run as Administrator** to execute the server installation package
- 2.) Click **Next** at the landing page and accept the License Agreement
- 3.) Select the **Custom** option and click **Next**
- 4.) Choose the installation directory where the software was previously installed and click **Next**
- 5.) Choose the **Web Server** and **Server Configuration Utility** on the **Select Features** page and click **Next**
- 6.) Click **Install** to install the software and click **Finish** when its complete

Step 5: Re-Install the OneStream XF Studio Package

- 1.) Browse to the OneStream Studio package, right-click on **Setup.exe** and select **Run as Administrator** to execute the server installation package
- 2.) Click **Next** at the landing page and accept the License Agreement
- 3.) Select the **Custom** option and click **Next**
- 4.) Select the installation directory where the software was previously installed (*C:\ProgramFiles(x86)\OneStreamSoftware*), and click **Next**
- 5.) Choose all options on the **Select Features** page and click **Next**
- 6.) Click **Install** to install the software and click **Finish** when its complete

Step 6: Upgrade OneStream XF Framework and Application Databases

Note: Make sure to have the DBA backup all OneStream Databases (*Framework/Application Databases*) prior to running the schema update operation.

- 1.) On the OneStream application server with the OneStream Database Configuration Utility installed, navigate to the utility
Start > Programs > OneStream Software > OneStream Database Configuration Utility
- 2.) Right-click on the utility and choose **Run as Administrator**
- 3.) Right-click on the **OneStream Framework Database** and choose **Upgrade Database Version**
Note: If this is grayed out, an upgrade to the database is not necessary

- 4.) Confirm the upgrade of the database
- 5.) Repeat this process for the application database(s) as necessary

Step 7: Update ASP.NET Configuration File with Configuration File Folder Location

- 1.) On each OneStream server, navigate to the OneStream Server Configuration Utility
(*Start > Programs > OneStream Software > Server Configuration Utility*)
- 2.) Right-click on the utility and select **Run as Administrator**
- 3.) Choose *File > Open ASP.NET Configuration File* and browse to *C:\Program Files\OneStream Software\OneStreamAppRoot\OneStreamApp* on application servers, or *C:\Program Files\OneStream Software\OneStreamWebRoot\OneStreamWeb* on web servers, and select the **web.config** file
- 4.) When the web.config opens, paste the Configuration Files Folder path
- 5.) Close the file making sure to save upon closing
- 6.) Repeat this process on each server in the environment

Step 8: Update Application and Web Server Config Files

- 1.) Open Application Server Configuration file and Click **File > Save**
- 2.) Close and re-open the Application Server Configuration File
- 3.) Scroll to Database Server Connections and select the ellipsis (...) icon
 - Update command Time-outs for OneStream Database Server Connection:
 - Short = 90 *must do
 - Large = 900 (minimum of 900)
- 4.) Save and Close Application Server Configuration file
- 5.) Open Web Server Configuration file
- 6.) Click **File > Save**
- 7.) Close Web Server Configuration file

Step 9: Update Identity to OneStream Service Account in Internet Information Services Manager (IIS)

- 1.) On each OneStream server, launch Internet Information Services Manager
(*Start > Control Panel > Administrative Tools > Internet Information Services (IIS) Manager*)
- 2.) Expand the server in the left pane and select **Application Pools**
This will display a list of application pools in the right pane. The OneStreamAppAppPool on the application servers and OneStreamWebAppPool on the web servers.
- 3.) Right-click on the **OneStreamAppAppPool** and select **Advanced Settings**
- 4.) Click in the **Identity** field and select the ellipsis (...) icon
- 5.) Choose **Custom Account** and click **Set**
- 6.) In the **username** field, enter the **OneStream Service Account** (*Domain\Username*) and enter/confirm the corresponding password
- 7.) Set **Ping Enabled** to **False**
- 8.) Set the **Disable Recycling For Configuration Changes** setting to **True**
- 9.) Expand the **Generate Recycle Event Log Entries** setting, set any of the items beneath it to **True**, and click **OK**

Generate Recycle Event Log Entry	
Application Pool Configur	False
Isapi Reported Unhealthy	False
Manual Recycle	False
Private Memory Limit Exceed	True
Regular Time Interval	True
Request Limit Exceeded	False
Specific Time	False
Virtual Memory Limit Exceed	True

10.) Once this is complete, restart IIS on each OneStream server in the environment

Step 10: Test OneStream Environment Login

- 1.) Navigate to the OneStream Web URL:
<http://<webserver>:50001/OneStreamWeb/OneStreamXF.aspx>
- 2.) Verify the ability to login to OneStream XF
- 3.) Select **System Administration** from the application drop down list and click **Connect**
- 4.) Navigate to *Tools > Application Servers*
This will display a list of all application servers and their server status
- 5.) Verify each server's **WCF Connection** status is **OK**
- 6.) Verify each server's CPU % is updating

Step 11: Application Verification

- 7.) Compile ALL Business Rules
 - Right click grid and Export any errors to an Excel file format for analysis
 - Apply updates to Business Rules as need
- 8.) (Optional) Import new Standard Reports after downloading from Store on XF MarketPlace