

OneStream XF Version 5.3.0

Release Notes

Updated: December 13, 2019

This release of OneStream XF contains a variety of features developed to enhance the design capabilities, performance and ease of use of applications. Designers, system administrators and users will benefit from the enhancements across their application. The “Retain Formulas” feature, in Spreadsheet and Excel, will offer end-users greater flexibility in managing their data submissions. Designers and system administrators are provided new tools and properties to design, create and manage applications with the new “Copy Dashboard” functions, as well as Dashboard Component and Cube View enhancements. Modeling with BI Blend now includes new Aggregation Controls to more efficiently define the results table along with new Connector BRAPI’s to source data from Cube data and source systems.

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Important Notes

Prerequisites

See the *OneStream XF 5.3.0 Upgrade Guide* section for important notices and details regarding planning your upgrade.

Compatibility and Important Notices

See the *OneStream XF 5.3.0 Upgrade Guide* section later in this document for information on compatibility of the OneStream Studio and OneStream Excel Add-in versions.

OneStream XF users are encouraged to adopt the OneStream Windows App. The OneStream XF web interface has been developed utilizing Microsoft’s **Silverlight** web browser plug-in. Microsoft officially announced in 2012 that development of Silverlight will be discontinued with support scheduled to end in October 2021. The OneStream Windows Application is the replacement for the Silverlight-based browser interface. Customers should note that certain new features may only be available in the OneStream Windows App due to its technology advantages. In addition, users can access OneStream XF through the HTML5-based OneStream Mobile and OneStream Excel Add-in. OneStream will not support the Silverlight-based web browser interface beyond 2021.

OneStream XF version 5.3 will be the last version to support the Windows 7 operating system. **Windows 7** shall no longer be supported as a client operating system as of January 14, 2020, in line with Microsoft’s mainstream support policy.

OneStream XF

New Features

BI Blend

Development of BI Blend in 5.3 has been focused on providing additional capabilities to more precisely define the data records in the results table. The new Aggregation Controls, such as the “non-inclusive”, allow more granular filtering of the aggregation results. Additionally, a new set of Fast Data Extract, or “FDX Connector” BRAPI’s are included to allow Cube data and source system Data Sources to be defined and optimized for BI Blend.

Performance has been enhanced with the ability to partition within the Blend Unit. This is done by managing data records using the Data Source “Source ID”. Additional performance gains are found with new settings to manage the database with **Shrink After Finalize** and through greater integrity with enhancements to the Learning Mode process.

The application table **StageBlendInfo**, now captures additional metadata properties for options to report on BI Blend processes.

Please review the details of the BI Blend features in the *BI Blend Design and Reference Guide* found in the full documentation package.

- BI Blend Content Type “TimeWFViewAV” now supports the Transformation Rules property of Flip Sign. (14412)
- A new Aggregation Type has been created for use with the Create Star Schema method. The Aggregation Type “SSOnly” will create the entire dimension from the Root member in the Star Schema table. The dimension members are not created as stored aggregation records. (14757)
- Aggregations can be defined as “non-inclusive” to allow dimension “Top” member to be utilized without generating aggregation data records. (14886)
- FDX, Fast Data Extract, BRAPI’s allow a variety of options for connecting to DataSources for BI Blend. A key differentiator between the FDX BRAPI’s and other collection methods is support of parallel processing, in-memory processing and management of the Time dimension. (14365)

Business Rules

- A new BRAPI has been added to “Members”: **ReadParentRelationshipsNoCache** enhances the ability to manage metadata through business rules. This new function is used to validate if a member has a relationship with a parent or is an “orphan” member. (15056)

“Retain Formulas in Cube View Content” in Excel and XF Spreadsheet

Retain Formulas in Cube View Content is a new Cube View setting that has been added to the Cube View Connection dialogue box within Excel and Spreadsheet. This new feature allows users to form Cube View grids of data in Excel (using the Cube Views menu function), that can then be linked to other Excel models for easy submission into OneStream. This feature allows formulas (to writeable cells) in Excel (or Spreadsheet) for an attached Cube View to be retained on submission and retrieval instead of being replaced with the value of the represented formula. (14814,12115).

Presentation

Copy (and Paste) Dashboards, Components, Adapters, Parameters, Files and Strings

- Copy and paste Dashboards, Components, Adapters, Parameters, Files, and Strings within or across Dashboard Maintenance Units.

Multiple items can be selected all at once using Shift+click or Ctrl+click. The ability to copy and paste using right-click or toolbar menu buttons and Copy and Paste (new). Items can be copied and pasted multiple times and each time the item is pasted, a suffix of _Copy will be added. For every additional instance of the Dashboard item that is pasted a suffix of _Copy (instance#) will be added. Excluded from Copy: Maintenance Units, Dashboard Groups, Dashboard Profiles, Profile Members. (13953)

SQL Table Editor

- The SQL Table Editor has new properties to allow designers to customize the display of the Title bar and to define the activation/deactivation of the toolbar buttons. Designers are now able to define the complete Component control to manage the ability to “save and revert” the state. (11359)

Grid Viewer

- The Grid Viewer now supports “user-preference” control properties with the new **Columns Settings** button. When activated as a property, a user can re-order and manage the visibility of columns. A new “Save State” property will retain the Column Settings selections as a preference. (12547)

Dashboards

- Dashboard properties now include the ability to activate or deactivate the panel “x” close button. The **Display Format** property includes the new setting of **EnableSystemClose**. (14193)
- Removed the hover functionality with the Hamburger icons and make it open and close with clicking only. (10738)
- Removed the light-blue border around the BI Viewer. (14858)

Large Data Pivot Grid

- A new property, **Save State**, has been added to the Large Data Pivot Grid to activate the Save State toolbar button. The default setting will be “False”. (14695)

Cube Views

- Cube View performance has been enhanced with a new Column Data Property “**Used To Determine Row Suppression**”. This new setting allows a designer to tailor the columns used to evaluate row suppression intersections. (14356)

Work Flow

- Data Quality Cube View Profiles have been enhanced to support the user-toolbar button to customize Row Suppression settings. (11699)

Table Views

- The Table Selection window is now filtered by the Business Rule Type, displaying only Spreadsheet Type Business Rules for simplified navigation. (14565)

Fixed

- (14916) Metadata Property, “Display Member Group”, was not properly changed for the assigned Security Group.
- (14335) OneStreamMgmtAppPool IIS default recycling has been changed to 0 from 30 minutes. This change will no longer override the default 120-minute Idle Time Out settings and minimize application pool recycling.
- (6424,14410) When data is being written to a Data Unit through Business Rules, a Force Consolidate is no longer required across hierarchies. Workflow Intercompany Matching reports do not require Force Translate to view Reporting or Partner Currency translations.
- (12441) Application Cube View Logo with a low pixel density will correctly display in Cube View Headers and Dashboards.
- (12360) User Defined Attribute properties are enabled for viewing and sorted in the Dimension Grid Viewer.
- (11519, 10698) Cube View Conditional formatting now supports additional properties when using the MemberName condition.
- (11457) OneStream XF Studio XF Sub Reports can manage controlling the inclusion of the Report Header and Header Bar using the Cube View Report Properties of **ReportIncludeHeader** and **ReportIncludeColumnHeaderLine**. These Cube View formatting properties are used in place of the Studio XFSubReport properties.
- (11308) Cube View Mask Transformation Rules will launch the Conditional Expression Editor when using the Logical Operator.
- (11247) When running an Excel Export Item in an Excel Book from within a Dashboard, the Book will launch as a Microsoft Excel workbook.
- (10752) The Workflow Process Step activity details will be displayed in the Task Activity log within the Description field.
- (10515) Workflow Calculation Definitions using “User Cell Input Entity” no longer display error messaging if an Entity in the definition has been deleted.
- (10386) Forms with Cube Views, designed using Parameter-based formatting, will retain all formatting when Forms are Reverted.
- (10285) Workflow Import property description has been corrected for “Can Load Unrelated Entities”.
- (14203, 14197) The Large Data Pivot Grid fields support database column names containing blank spaces.
- (14171) Enabling or disabling Large Data Pivot Grid Row Totals will retain the positioning of the grid “grand totals” at the bottom of the display.
- (14200) Database “Null” member values in data records are now able to be filtered in the Large Data Pivot Grid.
- (14118) Large Data Pivot Grid filters, in the Hidden Area or Filter Area, will support PreFilter conditions without displaying a reference error.

Known Issues

- Non-Administrator Application Pool User Returns Errors for PerfLib and PerfNet When Recycling IIS and also Background Intelligent Transfer Service When Using "Recycle App Pool" (14336)
- The Report Preview Error in Cube View Sharing Rows/Columns with the same Name in Shared Cube Views. (2651)
- 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)

- 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 for On-Prem. (4603)
- Excel Extensible Documents may not retain the margin and print area formatting when assigned to a OneStream Book of reports. (9052)
- Mapping to Data to UD Entity Default Is Not Aggregating With Row Mapping to Same UD Explicitly When Loading to Cube. (9549)
- Viewing Dashboards in the Silverlight Web Browser, which are designed to contain more than six levels of nested Dashboards, may not render as expected. Users encountering this issue should use the OneStream Windows Application interface as a solution. (10136), (10102)
- Users editing dimension hierarchies through the Silverlight-based web interface may experience an intermittent issue where the Dimension Library page becomes unavailable. Use of the OneStream Windows Application is the recommended solution for application management to avoid this situation. (10274)
- (13975) The import of application extract files currently has a maximum file size of 1 gigabyte. File sizes greater must have the extracts redefined to yield a smaller file size.
- Within Business Rule scripting, Member Object Properties are now set as “read-only” and must be written during member construction. (14404)
- With the Dashboard ‘undo’ button, “Cancel all changes since last save”, users will have to exit the screen to undo changes for the Dashboard Item. (15854)
- The Reset Large Data Pivot Grid (LDPG) to Component Settings (Revert Layout button) should be grayed out before settings are changed and once it has been used and the settings are restored. Once changes are made to the LDPG the user can refresh the screen to enable the Revert Layout button.(13876)
- The Large Data Pivot Grid will not display a label for filter members which are “Null” or “Empty String” fields in records. The first checkbox represents “Null” and the second checkbox represents “Empty String”. (15362)
- The Dashboard ‘undo’ button - “Cancel all changes since last save” does not work for Dashboard Items. (15854)

Contacting Support

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

OneStream XF 5.3.0 Upgrade Guide

This document provides an overview of OneStream XF's upgrade process when moving from an earlier OneStream XF release to 5.3.0. The anticipated audience for the upgrade process is Information Technology professionals responsible for installing, maintaining and supporting OneStream XF.

Review the following **OneStream XF 5.3.0 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, it is required to update OneStream to **.NET 4.7** for Microsoft's security standards and for advanced features to stay current on the latest version of the .NET Framework. Please note, Microsoft provides the .NET Framework 4.7 optional update through standard Microsoft Windows Updates.
- 2.) The most recent **database schema update** was 5.2.0. There is a need for a database schema update if upgrading from 4.2.x, 4.3.x or 5.x to version 5.3.0. If upgrading from version 4.2.0 or earlier, Database Schema updates must be implemented as part of the upgrade on every Application and Framework database. Full Database Backups are recommended.
- 3.) The 5.3.0 version of the **OneStream Studio** and **OneStream Excel Add-in** are not backward compatible with versions up to 5.x 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 4.2.0 or earlier, 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.

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, IIS_IUSRS 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** 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: **XFAAppServerConfig.xml and XFWebServerConfig.xml**.
- 5.) Copy 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.) The Service Account must be an Admin ID or in the IIS_IUSRS Group, Performance Log User and Performance Monitor Users groups.
This ID is necessary to use for 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 the OneStream Application Server with the OneStream Database Configuration Utility are Installed

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

Step 7: Verify the OneStream Application Server with OneStream Studio is 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.

Pre-Installation Member Object Rules Evaluation

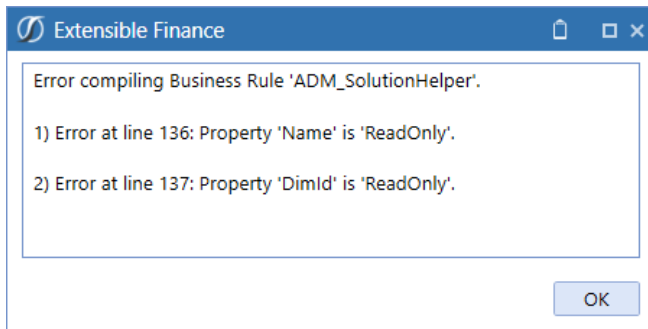
OneStream XF Version 5.2 introduced a coding change making Member Objects Read-Only as part of regular, on-going code enhancements. This change may cause issues with some existing applications where business rules are used to create or edit metadata.

This issue can be identified by:

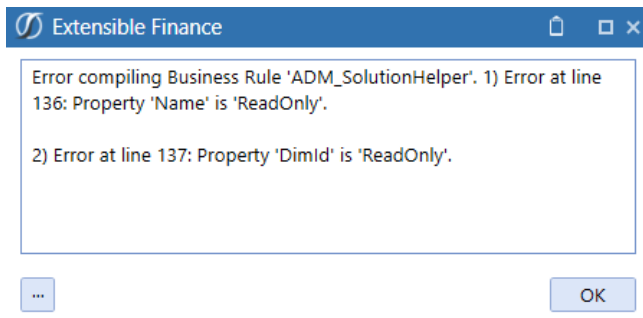
- Business Rules which create, or update metadata can be analyzed for problematic syntax.
- After 5.2, compiling all Business Rules should display errors related to read-only objects.

Member Object Application Errors

This rules error can be identified after upgrading through a standard Business Rules compile. The Member Objects will cause an error to display.



The error will also display when the rules are executed through the application.



Member Object Identify Problematic Rules

Early rules may have been designed in a manner where the Member object was written-to directly. This syntax is no longer valid and is the cause of the compile and application errors.

```
'Member
'Dim dimensionId As Integer
Dim dimensionPk As New DimPk(BRApi.Finance.Dim.GetDim(si,dimensionName).DimPk)'(dimTypeId, parentMem.Member.DimId)
Dim newMemPk As New MemberPk(dimTypeId, DimConstants.Unknown)
Dim newMem As New Member(newMemPk)
newMem.Name = memberName
newMem.DimId = dimensionPk.DimId 'parentMem.Member.DimId
```

The Objects related to Member can be viewed using the “IntelliSense” feature, and each will be identified with their “read-only” status.

```
Dim newMem As New Member(newMemPk)
newMem.Name = memberName
newMem
  Bytes
  ConditionalInputCategories
  DataCellAccessCategories
  DataMgmtAccessCategories
  Description
  DimId
  DimType
  DimTypeId
  DisplayMemberGroupUniqueID
  parentMem.Member.DimId
  TypeId, parentMem.Member.MemberId, DimConsta
  parentMem.Member.DimId, RelationshipMovemen
  ReadOnly Property Member.Description As String
  .Insert
  (rel, nothing)
  ipPositionOptions()
Dim newRelPK As RelationshipPk = metaAdmin.SaveMemberAndRelationshipInfo(si, di
```


Member Object Rules Solution

The new design of the rule must define the objects while the member is constructed in the rules using the Member constructor to define the Member variable. The resulting variable is then used to update the metadata or metadata properties.

This function contains multiple variations depending upon the use requirements.

The example below is the common syntax requirement to create a new member, such as a User Defined member.

```
Member( memberPk , Name as String, Description as String, dimID as Integer )
```

```
'Member
'Dim dimensionId As Integer
Dim dimensionPk As New DimPk(BRApi.Finance.Dim.GetDim(si,dimensionName).DimPk)'(dimTypeId, parentMem.Member.DimId)
Dim newMemPk As New MemberPk(dimTypeId, DimConstants.Unknown)
Dim newMem As New Member(newMemPk, memberName, "", dimensionPk.DimId)
```

Member Object Updates to Existing Members

There may also be instances where business rules are used to modify existing metadata member properties. Since the Objects are now read-only, updates to existing member objects, such as Descriptions, must be performed using the Member constructor. This will require the use of an alternate syntax on the Member function.

The existing member's properties must be passed into the function, updating only the desired property. For example, all the existing properties of the current member can be used in the New Member constructor, modifying only the "Description" property to perform an update to the existing member.

```
Dim newMem As New Member()
Sub New(memberPk As MemberPk, name As String, description As String, dimId As Integer, displayMemberGroupUniqueID As Guid,
readDataGroupUniqueID As Guid, readDataGroupUniqueID2 As Guid, readWriteDataGroupUniqueID As Guid, readWriteDataGroupUniqueID2 As Guid,
useCubeDataAccessSecurity As Boolean, dataCellAccessCategories As String, conditionalInputCategories As String, dataMgmtAccessCategories
As String)
```

Upgrading System Components

The following section describes the process 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.) Close any open OneStream Configuration Utilities.
- 4.) Stop the **OneStreamAppAppPool** and/or **OneStreamWebAppPool** by right-clicking on each and selecting **Stop**.
- 5.) Repeat these steps for each server in the environment.

Step 2: Uninstall the OneStream XF Servers Package

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 the 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 the web server, application server, and all utilities. This can also be used for 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 Database Configuration Utility 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**.
NOTE: If Mobile is installed, check the Mobile Web Server Option also.
- 6.) Click **Install** to install the software and click **Finish** to 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** to 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 and **Save**.
- 6.) Repeat this process on each server in the environment.

Step 8: Update Application and Web Server Config Files

- 1.) Open the 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 the command Time-outs for the OneStream Database Server Connection:
 - Short = 90 *must do
 - Large = 900 (minimum of 900)
- 4.) Save and Close the Application Server Configuration file.
- 5.) Open the Web Server Configuration file.
- 6.) Click **File > Save**.
- 7.) Close the Web Server Configuration file.

Step 9: Update the Identity to the OneStream Service Account in Internet Information Services Manager (IIS) Using OneStream Server Configuration Utility “Configure IIS Tool”

- 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 **Tools > Configure IIS**.
- 4.) Update the Configure IIS Dialog as follows:
 - a. Web Site Name: Enter the name of the OneStream IIS Website to update.
 - i. OneStream App Server Site
 - ii. OneStream Web Server Site
 - iii. OneStream Mobile Server Site
 - b. Check the “Update IIS Default Settings” box.
 - c. Set the radio button for updating the appropriate website.
 - i. Set the radio button to “Use XF Web Server Settings” when updating IIS for the OneStream Mobile Web Server Site.

- ii. Set the radio button to “Use XF Web Server Settings” when updating IIS for the OneStream Web Server Site.
 - iii. Set the radio button to “Use XF App Server Settings” when updating IIS for the OneStream App Server Site.
 - d. User Account Type: Select Custom Account.
 - e. Enter the User Name and Password of the OneStream Service Account.
- 5.) Click the **Update IIS Settings** button after setting the appropriate fields and click **OK**.
- 6.) Repeat this to set the appropriate IIS Settings for the application pools in IIS.
- 7.) Click the **Reset IIS** button to perform an IISRESET on the server for the changes to take effect.

Step 10: Test the 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 the System tab, *Tools > Environment*.
This will display a list of all application servers and their server status.
- 5.) Verify each server’s **status shows as active and green**.

Step 11: Application Verification

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