OneStream Release Notes

7.4.4 Release

Table of Contents

7.4.4 Release Notes OneStream

Introduction

OneStream 7.4.4 is a hotfix release that addresses Excel Add-In compatibility.

If you are upgrading from a version prior to 7.4, framework and application database schema updates are required for this upgrade. Full database backups are recommended. If you are upgrading from version 7.4.0 or 7.4.1 to 7.4.2, framework and application database schema updates are not required.

Self-Hosted:

- Customers on v7.2.x, v7.3.x, or v7.4.x can access the hotfix from Solution Exchange.

- Customers on a version prior to 7.2.x are required to upgrade to v7.4.4.

- Customers need to update the Windows Desktop Client and Excel Add-in.

- This hotfix is not backwards compatible.

Cloud-Hosted:

- Customers need to install the Windows Desktop Client & Excel Add-In.

- Click-Once is not updated as part of this hotfix.

- This hotfix is not backwards compatible.

- If you would like to have this hotfix applied to your environment, please submit a Customer Upgrade Catalog Request in Service Now.

Important Notes

Prerequisites

Refer to Requirements for important notices and details regarding planning your upgrade.

Compatibility and Important Notices

- Microsoft ended support for Azure Active Directory Authentication Library (ADAL) in December 2022. As a result, we have migrated to the Microsoft Authentication Library (MSAL) for authentication and authorization.

- Microsoft retired Internet Explorer (IE) in June 2022. This affects all versions starting with 7.0.1 when IE is disabled inside of your organization.

- The OneStream Studio client for custom reporting was deprecated starting with 7.1.0. Report designers must use the Report Designer in the Dashboard Report Component feature. To install the Client API going forward, use the new stand-alone Client API installer.

- OneStream supports Windows Server 2022.

- OneStream Client operation supports Windows 11.

Enhancements and New Features

- Updates were made to PowerShell references for use with the Client API, removing the need to directly reference OneStreamClientApi.dll in PowerShell scripts. You will need to update PowerShell scripts created before 7.4. (PF7-495)

- Workflow configuration is streamlined to allow more than two levels of extended cubes. This was updated to tightly integrate imported data within the Workflow Top Level cube. Application architects and implementors can now minimize managing data movement and validation processes between cubes. (PF5-2066)

- The dashboard contains a new property called Dashboard Type. This property was created to designate how a dashboard is used. The Dashboard Type can change whether the dashboard is visible in OnePlace or if parameters are resolved, resulting in a slight performance impact. (PF6-1894)

- You can use custom control dashboards and embedded components when the Dashboard Type Custom Control is selected. This allows one-to-many relationships to exist between the dashboard and the embedded component. (PF6-1894)

- You can now write inline dashboard business rules using the new Assemblies node within a given dashboard maintenance unit. These business rules are stored in the maintenance unit and do not have to be edited or extracted separately. This new feature applies to XFBRString, Dashboard DataSet, Dashboard Extender, and spreadsheet rule types. (PF6-2010)

- To support the new Workspace Assemblies features, a security property called AdministerApplicationWorkspaceAssemblies was added to Application Security Roles. A security property called AdministerSystemWorkspaceAssemblies was added to System Security Roles. These properties account for the new workspace assemblies features. You can now add and edit workspace assemblies in system dashboards and application dashboards.

- Watermarks can be incorporated into Text Editor documents. This helps you protect company documents from unauthorized use. You can use images or text to create watermarks. (PF1-8456)

- The aggregated member found in the Consolidation dimension is now available for data input. This can be enabled on individual scenario members through a new property called Allow Input into Aggregated Consolidation Member. This improves the design of data collection mechanisms when using the aggregated member. (PF1-8329)

- You can automatically reduce text size to fit inside a spreadsheet cell. This eliminates the need to resize the column width and prevents text from being cut off when it exceeds the cell width. (PF1-8468)

- In the SQL Table Editor Dashboard Component, the drop-down list is searchable to improve the efficiency of finding the appropriate item. As you type, search options are narrowed down to those that contain the typed text and you no longer have to scroll through a long list. (PF1-7941)

- The Excel Add-In logs errors in the user's AppData folder located on the C: drive. (PF5-1903)

Limited Availability

Limited Availability programs control the release of designated new functionality to enable our Cloud and Support teams to manage setup and operational tasks.

- OneStream IdentityServer (OIS) is an authentication platform that supports SSO integration with OIDC and SAML 2.0 compliant identity providers (IdPs), including multiple IdPs sourced to a single OneStream cloud instance. Additionally, OIS provides generation of personal access tokens (PATs) for REST API authentication and has extended functionality for native login IDs including support to reset a forgotten password and enhanced security through password salting and hashing. OIS includes a self-service feature that enables you to manage OIDC identity providers.

  OIS is the standard authentication platform for new customers adopting version 7.4. If you are an existing customer and require multiple authentication sources, the use of PAT, or secure native login IDs, you can request OIS in your version 7.4 upgrade. General availability of OIS will be available in the future.

  Note the following limitations for OIS:

  - OIS is currently only available in the OneStream Hosted Cloud and is not intended for on-premise deployment.

  - FedRamp support for OIS is in progress.

  - OIS does not support the Client API.

  - OIS does not support authentication using Microsoft Active Directory (MSAD) or Lightweight Directory Access Protocol (LDAP).

  - Currently, OIS only supports self-service management for OIDC compliant identity providers. Future plans include self-service management for SAML 2.0 compliant identity providers.

- Smart Integration Connector provides secure connectivity between a OneStream SaaS instance and customer data sources residing within a local network. Smart Integration Connector is the standard data integration technology for all new customers adopting Platform 7.4 and higher, replacing VPN. With Smart Integration Connector you can:

  - Establish connectivity between OneStream Cloud and data sources in your network without a VPN connection.

- Create and manage network data source integration using OneStream administration interfaces.

- Locally manage database credentials.

- Delete Gateways from development instances. (PF2-13797).

Contact your Customer Success Manager if you are interested in learning more.

Fixed

7.4.4

- A new compatibility setting is available to prevent the OneStream Excel Add-In from being disabled programmatically. (PF8-896)

7.4.3

- Platform job processing performance is negatively impacted when run concurrently with a job processing from another application on the same application server. The degree of the performance issue is relative to the overall size and count of inter-company designations in the entity dimensions. Multiple parentage entity relationships are also a contributing factor to the issue. Defect correction PF5-3664 resolves this issue through segmentation of the server cache by application to prevent conflicts between concurrently operating consolidation processes. No changes to the entity dimension structure are necessary.

7.4.2

- During a detailed security review, OneStream discovered a vulnerability in the native authentication process in versions 7.4 and 7.4.1. This has been addressed in 7.4.2. OneStream advises all customers running version 7.4 and 7.4.1 to upgrade to version 7.4.2 immediately to remediate this vulnerability.

- Derivative transformation rules using << (prefix) and >> (suffix) are fixed. Framework and application database schema updates are not required for this upgrade.

- Out of memory errors that were occurring during upgrades of large databases when using the OneStream Database Configuration Utility are fixed.

7.4.1

- Query performance degradation in cube views and data management cube exports is fixed. Performance issues were observed in queries that included empty data units, where all amounts were null. Empty data units could include unused or newly added entities, scenarios, years, or currencies. The more cells in the query definition represented by an empty data unit, the greater the performance impact. (PF5-2236 and PF5-2203)

7.4.0

- In the Report Viewer's Export and Send list of document files to choose from, the description of the DOCX file type is fixed. It correctly says "DOCX File" instead of "Send." (PF1-25050)

- Clicking Cancel no longer gives an error when inserting a picture in the spreadsheet. (PF1-25195)

- If you are currently using the SQL Table Editor or Grid View component in Dashboards, you can now filter on the Stored Value (PF5-2091).

- Cloud Customers with "Cloud Telemetry Settings" enabled no longer receive an object reference error when validating or retransforming data. (PF5-2026)

- Performance no longer slows when saving changes within System > System Configuration > Database Server Connections > Custom if numerous connections exist. This was a known issue in release 7.3. (PF5-1926)

- Previously lost connection in the Excel Add-In when using Cube View Connections has been resolved when setting Application.EnableEvents to True. (PF5-1620)

Known Issues

- OneStream Release 7.2.1 introduced an enhancement to the platform (PF5-1663) that refines how CalcStatus is evaluated. This enhancement addresses multi-server environments where data entry occurs within milliseconds of a CalcStatus being updated due to a calculation or consolidation.

  The system now favors over-impacting the CalcStatus to "CA." Implementors need to account for this issue when triggering a calculation or consolidation immediately after a Data Unit's calc status is impacted.

  You may see this issue when creating a Dashboard Button or Event Handler rule that runs a calculation or consolidation immediately after data is saved. The current workaround is to incorporate a 1 second sleep into the beginning of your business rule using this logic: "Threading.Thread.Sleep(1000))".

- When a 3D version of a chart is selected in the Report Designer, the chart flips its orientation upside down. This behavior is limited to the Report Designer only. The 3D version of the chart renders with the correct orientation outside of the Designer such as when viewing on a dashboard. (PF1-8607)

- The Watermark dialog box inside the Report dashboard component is missing the Clear All button. This button removed all watermarks in the document at once. As a workaround, remove each watermark individually by clearing the watermark text or picture and clicking OK. (PF1-27974)

- The font inside the Report Designer's Chart Options cannot be changed. Selecting the field to change the font results in an error: Unable to cast object of type 'DevExpress.Drawing.DXFont' to the type 'System.Drawing.Font'. (PF1-27911)

- With platform version 7.1.0 and newer, you may encounter an error when loading the MarketPlace solutions Cash Planning, Capital Planning, Sales Planning, and Thing Planning. If you encounter this error, load People Planning first, then subsequent planning solutions. Once your planning solutions are loaded successfully, uninstall People Planning if not using. (PF-27430)

- Using third-party libraries in business rules causes compile errors. The solution depends on if unsupported NameSpaces are used in a business rule file or member formulas. (PF2-8996)

- Data may disappear when you scroll grid and pivot grids in BI Viewer. (PF5-50)

- VB.Net rules that are converted into C# rules require the following imports to successfully compile (PF1-7495):

  - System

  - Microsoft.csharp

  - System.linq

  - System.collections.generic

  - System.collections

  - System.text

- With the introduction of C# business rules, imported snippets must have a language type designation, either VisualBasic or CSharp. If you use the currently available snippet import template, you will receive an error when importing snippets. The workaround is to manually add a LanguageType column to the Excel template and define a value (either VisualBasic or CSharp) for each snippet. Use the following steps:

  1. From the Snippet Editor dashboard, download the Snippet Import Template (or open an already populated Snippet Import Excel file).

  2. Insert a new column anywhere between the existing ModuleType field and Content field and name it LanguageType.

  3. Unhide hidden rows numbered 7 - 10 by highlighting rows 6 and 12, right-clicking, and selecting **Unhide**.

  4. In row 10, add the following formula for the newly added LanguageType column: xfText#:[LanguageType].

  5. Add snippets as usual, and in the LanguageType column, define each snippet as either VisualBasic or CSharp.

- Beginning in release 7.1.1, the stage engine no longer summarizes rows that are mapped to **(bypassed)**. If a workflow imports data that all gets bypassed, the summarization step no longer generates summary stage records. As a result, the import fails, preventing completion of the workflow.

- Self-hosted customers using Native ID (as opposed to an external SSO ID) can authenticate with version 7.3.1 and 7.4.0. This applies only when accessing the Click Once Tiles page with a Native ID that requires a reset password (first-time user, admin forced a password reset, new password validation rules cause old password to fail). Under this limited scenario, the issue encountered is that you will not be able to login. See OneStream Knowledge Base article KB0012607 for a simple proactive solution. (PF2-14247)

Contact Support

If you would like assistance with your upgrade, contact Support through the ServiceNow portal. If you do not have access to ServiceNow, contact your customer success representative.