OneStream Release Notes

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8.0.1 Release Notes OneStream

OneStream 8.0.1 is a hotfix release that addresses user authentication issues where multiple users are authenticating simultaneously.

Highlights

- We migrated the development framework from .NET4 to .NET6. You will see immediate benefits from performance improvements for memory intensive operations, such as consolidation and complex cube view processing. However, business rule compilation failures may result due to incompatible rule syntax or dll file references.

- OneStream IdentityServer (OIS) and Smart Integration Connector (SIC) are generally available and represent the standard authentication and data integration technologies for version 8.0.0.

- We continue to upgrade Workspaces with more features in workspace assemblies. Also, you can build cube views within workspaces.

- Many ideas resulted from IdeaStream, such as form templates, business rule user interface improvements, and data management. Continue to vote on IdeaStream to participate in what comes next.

- Journals were updated to improve the user experience of posting journals and enable finer granularity over segregation of duties.

- OneStream Documentation is now public. Go to https://documentation.onestream.com/ to see version 8.0.0. Documentation previously provided in OneStream releases has been removed and all available documentation is on the public site.

- You can continue to use the service catalog to indicate interest in upgrading to Platform v8. Customer Success Representatives will engage all interested Platform v8 candidates to review preparation activities required for a successful upgrade. Refer to the Platform v8+ Upgrade Group in ONECommunity for information and discussion.

Prerequisites

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

- Framework and application database schema updates are required for this upgrade. Full database backups are recommended.

- Review the *Upgrade OneStream Guide*.

Important Notes

- .NET6 Desktop Runtime must be installed to local desktops and laptops to successfully operate the Windows Application Client in a Platform v8.0 environment. Refer to the Platform v8+ upgrade group in ONECommunity for more information.

- VPN or ExpressRoute use with OneStream cloud on Platform versions prior to 8.0.0 will reach End of Service on August 31, 2024. All customers using VPN or ExpressRoute who are upgrading to Platform 8.0.0 or higher will be required to migrate to Smart Integration Connector to integrate with local data sources. Cloud customers remaining on Platform release versions prior to 8.0.0 can continue to use VPN or ExpressRoute through the End of Service date, after which VPN will be out of support.

- ERPConnect45.dll is no longer included with OneStream and Smart Integration Connector. See the *Smart Integration Connector Guide* for referencing and integrating with the new ERPConnect20.dll, available on the DLL tile on the Platform page of Solution Exchange.

- Customers in the OneStream-hosted environment will use OneStream IdentityServer for authentication with OneStream Platform v8.0. See the *Identity and Access Management Guide*.

- Client API is not supported with OneStream Platform v8.0.

- OneStream supports Windows Server 2022.

- OneStream Client operation supports Windows 11.

- Resource Owner Password Credentials (ROPC) are no longer supported. Customers in a OneStream-hosted environment are required to use OneStream IdentityServer personal access tokens. Customers in a self-hosted environment are required to use SSO tokens. If you are currently not using either of these tokens, see Visual Basic for Applications (VBA) Procedures in the *Design and Reference Guide* for more information.

New Features

Smart Integration Connector

Smart Integration Connector is a General Availability feature. Smart Integration Connector provides secure connectivity between a OneStream SaaS instance and customer data sources residing within a local network. See the *Smart Integration Connector Guide* for more information about enabling this feature in your environment.

Identity and Access Management

OneStream IdentityServer is a General Availability feature. The Identity & Access Management Portal includes an enhanced self-service feature that enables you to independently add SAML 2.0 compliant identity providers through a manual configuration and test, edit, view, and remove those identity providers. See the *Identity and Access Management Guide* for more information about authentication with OneStream IdentityServer.

Copy Journals

You can copy existing journals into other time periods. This is useful when you are creating journals similar to ones already created and is helpful when managing recurring journals. (PF1-8815)

Validate Journals

You can ensure that dimension members selected in the journal are valid cube intersections based on constraints configured in the dimension library. If validation errors exist, they will display in a Validation pane allowing you to view them as you make edits to the journal. This helps you save time by validating entries earlier in the process. (PF1-8813)

Export Journals to XSLX

You can export journals associated with defined parameters to an XSLX file using the ExportJournalsToXSLX BRApi. It can be easier to read and modify journal data in an XSLX format compared to CSV files that are generated by the existing ExportJournalsToCSV BRApi. (PF1-8755)

Stage Summary Rows and Stage Ratio Values

Integration Settings are added to the Application Server Configuration Utility to enable the modifications of the Stage Summary Rows and Stage Ratio values. Minimum Data Record Count, Summarized Row Ratio, and Always Use Database Server configurations increase performance efficiency. (PF5-2095)

Copy Cube Views

Cube View Administrators can select multiple cube views to copy. Use the Ctrl key to select multiple cube views that are not grouped together. (PF6-2365)

Encrypting Workspace Assemblies

You can encrypt workspace assemblies at the file level. (PF6-2371)

Assemblies Reference OpenXML Packages

Assemblies allow references to known packages that are already part of the standard server install, such as OpenXML. (PF6-2201)

Cube Views Moved to Workspaces

Cube views can be created and edited in two locations on the Application tab: through the Cube Views page and the Workspaces page. Current cube views can be found in the Default Maintenance Unit under the Default Workspace. (PF6-2093)

Documentation

In the user interface, click the Help button to view the documentation from a public website.

Enhancements

- **Show Dimension Member Descriptions in Journal Line Items**: Dimension member descriptions are shown next to the member names in Journal Line Items. This provides clarity and accuracy. If dimension members contain language-specific descriptions, the descriptions are shown in your chosen language (culture is set in your user profile). (PF1-8696)

- **Journals Prevent Load to Unrelated Entities**: The Can Load Unrelated Entities property is added to Adjustment Workflow Profile types to prevent loading journal data to Entities not assigned in its Input Parent Workflow Profile. (PF1-8814)

- **Delete Journals**: You can quickly and efficiently delete multiple journals at the same time. (PF1-8796)

- **Require Journal Template**: A new security property, Require Journal Template, is in the Adjustment Workflow Profile type that enforces the creation of new journals from existing journal templates only. Administrators (system and application) can still create free-form journals. (PF1-8756)

- **Prevent Self-Approval and Self-Posting of Journals**: You can prevent users from approving journals they have created or submitted and posting journals they have created, submitted, or approved with two new security properties on the Adjustment Workflow Profile. This feature disables the Quick Post functionality. Preventing self-approval and self-posting of journals supports the compliance of segregation of duties. (PF1-8371)

- **Show UD descriptions in Journals**: Show the descriptions for the eight UD Dimension Types next to the UD dimension in the Journal POV and the line item headers using the new check box in the journal toolbar. Descriptions are defined in the Application Properties and can provide clarity on the purpose of the dimensions. (PF1-8698)

- **Remove Resource Owner Password Credentials (ROPC)**: Personal access tokens (PATs) are now supported for customers in OneStream-hosted environments. (PF7-2498)

- **ClickOnce Usage**: The ClickOnce process is enhanced to launch the application with a single click of the **Open** button while eliminating the tiles page. (PF7-2350)

- **Business Rule Access and Maintenance Groups**: The Administrators group is the new default for these groups. The default group can be changed by selecting access and maintenance groups for Business Rules in the Application Server Configuration. (PF7-2221)

- **Data Management Toolbar**: Allows for the use of the user interface located at the top of the toolbar for Rename Selected Item, Copy, and Paste along with a right-click option when selecting a current sequence or step to Copy/Paste. (PF5-1574)

- **Form Template Rename**: Application > Data Collection > Form Templates allows for the use of the user interface located at the top of the toolbar for Rename Selected Item, Copy, and Paste and a right-click option when selected on a current Form Template to Copy/Paste. (PF5-2083)

- **Workflow Drill Back**: Workflow Drill Back to Browser allows for special characters in a URL. (PF5-2116)

- **Data Management and Stage Load Retry**: When running Data Management or Stage Load process when a network name is no longer available, the system will retry at 1, 3, and 5 seconds. An error message will display after the third attempt if the network path is not found. (PF5-2144)

- **Load Overlapped Siblings**: When Base Input Setting option Load Overlapped Siblings is set to True, only load files that have an overlap will reprocess. (PF5-2207)

- **Confirmation when Saving Business Rules and Assemblies**: Added confirmation to Cancel All Changes Since Last Save button for Business Rules and Workspaces platform user interface. (PF5-2073)

- **Cube View Shortcuts**: Cube views have been enhanced for scaling, shortcuts, and hotkeys. See Shortcuts, Scaling, and HotKeys for more information. (PF8-57)

- **Rename Objects Using Different Cases**: You can rename dimensions, dimension members, confirmation rules, profiles, and more using different cases. For example, TBtest to TBTEST. (PF6-2767)

- **Dashboards Term Removed from Maintenance Units**: The term dashboards is removed from maintenance units. (PF6-3044)

- **System Security Roles**:

    - ManageSystemDashboards is renamed to ManageSystemWorkspaces at **System** > **Administration** > **Security** > **System Security Roles**.

    - SystemDashboardAdminPage is renamed to SystemWorkspaceAdminPage at **Application** > **Tools** > **Security Roles**. (PF6-2784)

- **Application Security Roles**:

    - ManageApplicationDashboards is renamed to ManageApplicationWorkspaces at **Application** > **Tools** > **Security Roles**.

    - DashboardAdminPage is renamed to WorkspaceAdminPage at **Application** > **Tools** > **Security Roles**. (PF6-2777)

- **System Tools Load/Extract**: System Dashboards is renamed to System Workspaces at **System** > **Tools** > **Load/Extract**. (PF6-2700)

- **Application Tools Load/Extract**: Application Dashboards is renamed to Application Workspaces at **Application** > **Tools** > **Load/Extract**. (PF6-2693)

- **System Tab Workspaces Update**: Under the System tab, Dashboards is renamed to Workspaces. (PF6-2623)

- **Title Bar Update**: In the Workspaces branch, the title bar is renamed from ApplicationDashboards to ApplicationWorkspaces. (PF6-2396)

- **Cube Views Across Workspaces**: You can create cube views with the same name across multiple workspaces. (PF6-2578)

- **New Cube View Groups Properties**: Workspace and Maintenance Units are new cube view groups properties. (PF6-2939)

- **Workspaces Toolbar Buttons**: Toolbar buttons accommodate moving cube views under the workspaces umbrella. (PF6-2220)

- **Removed Access Group Property from Dashboard Groups**: In Dashboard Groups, the security section has been removed from the user interface and the database. This change applies for all dashboard groups including in the default workspace or non-default workspace.

- **Cube View Groups Security Properties**: Cube View Groups at **Application** > **Presentation** > **Cube Views** have the security properties Access Group and Maintenance Group. You can edit these properties if you have the ManageCubeViews role.

  Cube View Groups at **Default Workspace/Default Maintenance Unit** have the security properties Access Group and Maintenance Group. You can edit these properties if you have the ManageCubeViews role.

  Cube View Groups located outside **Default Workspace/Default Maintenance Unit** have the security properties Access Group and Maintenance Group and are hidden from users.

  The Application security role ManageCubeViews gives you full rights to edit Cube View Groups in cube views and the default Workspace/Default Maintenance Unit cube view groups.

  The Application security role ManageApplicationWorkspaces gives you full rights to make edits anywhere outside the default Workspace/Default Maintenance Unit. (PF6-2751)

- **Updated Workspaces Icon**: A new icon displays for Workspaces, where the Dashboard icon was previously displayed. (PF6-2271)

- **XML Extract/Load**: You can extract and load newly created cube views, cube view groups, and cube view profiles using the traditional XML process under the Application Workspaces file type option.

  For XML extract, if you select the file type of Application Workspaces, the system updates the third line of code from <applicationDashboardsRoot> to <applicationWorkspacesRoot> on the extract.

  For XML load, the system properly loads <applicationWorkspacesRoot>. To support backward compatibility, if you have an XML extract that contains <applicationDashboardsRoot>, the system still loads the older version.

- For XF Project, when extracting a file, the folder structure is updated from Application Dashboards to Application Workspaces. (PF6-2808)

- **Whitelisted Domains**: The Whitelisted Domains setting in the Application Server Configuration file in OneStream gives you more control over the URLs and domains allowed to be referenced. Customers in a self-hosted environment can update this setting in the Application Server Configuration file. Customers in a OneStream-hosted environment can contact Customer Support to update this setting. (PF2-15004)

- **Logging**: To standardize and improve the logging strategy across server applications, the logging configuration settings have been removed from the OneStream Server Configuration Utility application and are included in the JSON files. (PF2-14996)

- **Authentication in a Self-hosted Environment**: Authentication settings are updated and streamlined in the OneStream Server Configuration Utility application. Instructions for authentication in a self-hosted environment are in the *Installation and Configuration Guide*. Instructions for configuring external identity providers for REST API in a self-hosted environment are in the *REST API Implementation Guide*. (PF2-14546)

- **Smart Integration Connector**: The 2GB .NET limit and 1 million return rows is increased to a threshold 5 million rows and 5GB. (PF2-14372)

- **Smart Integration Connector**: Business rules decompress automatically. If you are using Smart Integration Connector business rules, see the Business Rules section of the *Smart Integration Connector Guide* for updated business rules that previously used InflateJSonObject. (PF7-2140)

- OneStream Desktop Clients are now compatible with updated patch release versions. For example, v8.0.0 will be compatible with v8.0.1 and v8.0.2. (PF7-2637)

- **XFAspSessionState**: Table removed from Framework database. (PF7-1058)

- **Backward Compatibility for Navigation Actions**: Backward compatibility is ensured where DashboardAdmin is renamed to WorkspaceAdmin and where SystemDashboardAdmin is renamed to SystemWorkspaceAdmin. (PF6-3199)

Fixed Issues

8.0.1

- **Authentication**: Improved security against multiple user logins. (PF11-472)

  For cloud-hosted customers on v8.0 and above, a fix for this issue will be included in the operation maintenance release on Feb. 15, 2025. For self-hosted customers, a fix for this issue will be available for download from the Solution Exchange on Feb. 14, 2025.

  Customers using OIDC External SSO (Okta, PingFed, or Azure) should upgrade to the hotfix from the Solution Exchange. OneStream recommends enabling local redirect in the server configuration. Customers using SAML are advised to upgrade with the corresponding hotfix.

8.0.0

- **Dashboard BI Viewer Grid Filter Editor**: The filter editor displays for BI Viewer and BI Designer. (PF6-3261)

- **Underscores in Assembly File Names**: Within workspaces assemblies, if you create an assembly file using C# or Visual Basic, underscores replace spaces. (PF6-3210)

- **Workflows and Workspace Dashboard Names**: Workflows that contain dashboard names that are not in the default workspace load successfully and update the property page in the following format: WorkspaceName.DashboardName. (PF6-3133)

- **Dashboard Profiles**: Dashboard Profile properties removed in version 7.4 are added back in version 8.0. (PF6-2881)

- **Workspace Assemblies with Blank Dependency Names**: If you try saving a blank workspace assembly dependency file, you will be prompted to enter a valid name. (PF6-2866)

- **Toggle Page Size**: The toggle button lets you expand and contract screens properly (for example, viewing or editing an assembly file page). (PF6- 2848)

- **Change Display Gridlines in Advanced Tab**: Updates to the Display Gridlines property, located under the cube views or workspaces cube views on the Advanced tab under the Cube View Properties tab, are allowed and are not grayed out. (PF6-2552)

- **Saving While in the Assembly Editor**: When you click Save while editing a workspace assembly, the cursor remains in its current location. (PF6-2382)

- **XF Project Assembly Descriptions**: If you are using XF Project for an assembly and you extract it, the content tag contains everything in the property grid including the description. (PF6-2026)

- **Refreshing Content in an Unselected Tab**: Unnecessary redrawing of dashboards during tab switching has been addressed. (PF6-2239)

- **Complexity of Workflow Hierarchy Impacting Dashboard Performance**: Running dashboards only resolve predefined substitution variables or parameters as needed to improve performance. (PF6-2053)

- **NoDataLock**: Setting a metadata member (Account and UDx) and Workflow Channel to NoDataLock will not cause a warning to display upon save in an Input Form. (PF5-2025)

- **Dashboard Save Button**: Dashboard buttons will run a server task on initial click. A Business Rule pause step or second click is not required. (PF5-2339)

- **Processing UD Dimension Members**: When UD dimension members are configured as UD attributes, attribute UD members that are invalid for a given scenario type will not be processed. (PF5-1477)

- **Quick View Keep Only**: When using a Quick View with the Keep Only feature, data remains intact when Primary and Data Style are both set to Comma [0]. (PF5-2119)

- **FX Rate Screen**: When a grid cell is in edit mode and the user scrolls the column out of the visible area of the grid, it will not cause a blank screen to display. (PF5-2269)

- **Quick View Performance**: Performance enhancement when submitting or refreshing values in a Quick View. (PF5-2372)

- **Spreading**: You can use Spreading Types Factor and Accumulate along with adding a Rate. (PF5-2237)

- **Refresh Spreadsheet**: In the OneStream Windows Application, cell values populate when selecting Refresh Sheet in Spreadsheet. (PF5-2294)

- **Journal Import and IsSingleEntity**: When using a csv or xslx file to import journals, if IsSingleEntity is set to True, the Entity and Cube properties in the Journal POV will be set to Entity and Cube values defined in the first line item of that journal. Previously, the Entity and Cube properties in the Journal POV were set to (Not Selected), requiring you to manually set the properties. (PF1-8922)

- **ManageData Application Security Role**: Users with the ManageData application security role can load or extract data management jobs. They are not required to also have the ManageSmartIntegration application security role to perform these tasks. (PF2-15253)

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Known Issues

- The Whitelisted Domains setting in the Application Server Configuration file only allows for http and https formatted domains. References to non-http or non-https file schemes will no longer be allowed. (PF2-15004)

- If you are in a self-hosted environment using a SAML 2.0 external identity provider for authentication and encounter an error, update the ACS URL both in the Web Server Configuration file in OneStream and in the application registration for the external identity provider. Use this format: https://<domainname>/OneStreamWeb/OneStreamLogonCallback.aspx/

  See OneStream Knowledge Base article KB0012777. (PF2-15177)

- If you are in a self-hosted environment using a Microsoft Azure AD identity provider for authentication and encounter an error, add the tenant ID in the Web Server Configuration file in OneStream. See OneStream Knowledge Base article KB0012778. (PF2-15181)

- If you are a commercial customer in a self-hosted environment using Microsoft Azure AD for authentication and encounter an error, update the redirect URL both in the Web Server Configuration file in OneStream and in the application registration in Azure AD from https://onestreamclient to https://<domainname>/OneStreamWeb/OneStreamLogonCallback.aspx

  See OneStream Knowledge Base article KB0012781. (PF2-14668)

- If you are in a self-hosted environment using a Microsoft Azure AD identity provider for REST API authentication and encounter an error, add the claim aud in the ordered lookups in the Web Server Configuration file in OneStream. See OneStream Knowledge Base article KB0012779. (PF2-15031)

- If you are in a self-hosted environment using a PingFederate identity provider for REST API authentication and encounter an error, add the claim client_id in the ordered lookups in the Web Server Configuration file in OneStream. See OneStream Knowledge Base article KB0012780. (PF2-15027)

- Smart Integration Connector transfers data in parquet format from the Local Gateway Service to OneStream. If you are transferring a data type that is unsupported by parquet, the data returns as a string. (PF2-15235)

- XF Project Replace is not working correctly when loading maintenance units or workspaces with includeDescendants = true for Cube Views and Cube View Groups. The workaround is to manually delete the cube views and then the cube view groups if using the XF Project Replace feature.

- When using the SQL Table Editor within a Dynamic Dashboard, the Save Event does not execute properly. This issue will be fixed in the 8.1 Release. (PF6-3564)

- Basic and Advanced Charts may not appear in Report Books and Guided Reports. Download the PDF to view charts. (PF7-2914)

- When using REST APIs, the JSON response key tags are returned in camelCase. To be consistent with our standards and prior versions, these response key tags will be updated in the 8.1 Release back to PascalCase. (PF7-4441)

Solutions Moving to OpenPlace or Sunset

The following solutions will be moving to OpenPlace in August of 2024.

- Actor Workspace

- Close Manager

- Dimension Comparison Utility

- Help Desk

- PowerShell Scripting

- Process Control Manager

- Provision Request Manager

- Tax Provision

- Train Me (Video Help)

- Standard Cube View Styles

The following solutions will be sunset in August of 2024 and will no longer be supported by OneStream:

- End User Training - Cube View

- End User Training - Excel Analysis

- End User Training - Extensible Docs

- End User Training - Report Books

- End User Training - Spreadsheet Analysis

- End User Training - Videos

- End User Training - Workflow

- Process Blocker

Platform v8 Upgrade Process

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