



# OneStream Release Notes

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# Release 9.0.0

OneStream 9.0.0 is a major release with new features and enhancements.

For more information, see the 9.0.0 Release Highlights course on OneStream [Navigator](#).

Click a link to go directly to that section:

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## Highlights

- The Modern Browser Experience was enhanced this release through a variety of bug fixes as well as performance, security, and accessibility improvements. Additionally, the BI Viewer Designer and Map component are now available for use.
- Dynamic Cube Services is now Generally Available and provides the full end-user experience. See "About the Financial Model" > "Dynamic Cube Services" in the *Design and Reference Guide*.

## New Features

### BI Viewer Designer

BI Viewer now lets you modify components directly in the Modern Browser Experience without navigating back to the Windows Application. Simply select the pencil icon on a BI Viewer to open BI Viewer Designer.

### Dynamic Cube Views

Dynamic Cube Views enables developers to build and modify Cube Views through code to configure what is presented at runtime. Any property a developer can set for a Cube View in the user interface can also be set in the Assembly file when configuring a Dynamic Cube View. See "Dynamic Cube Views" in the *Design and Reference Guide*. (PF6-6983)

### Maps Component

The Maps component for dashboards is now supported in the Modern Browser Experience, but hover-over images for shapes on Maps are not currently available.

## Save from a Dashboard Button for Text Editor and Spreadsheet

The Button Component can submit data and save files within Text Editor and Spreadsheet, eliminating the need to navigate to the Save button in the ribbon. This feature functions in the Modern Browser Experience. See "Parameter Components" in the *Design and Reference Guide*. (PF6-4407)

## Save As from a Dashboard Button for Text Editor and Spreadsheet

When you save a new file in Spreadsheet or Text Editor, the dashboard button displays a Save New File Options window when initially selected, eliminating the need to navigate to the Save As button in the ribbon. This feature functions in the Modern Browser Experience. See "Parameter Components" in the *Design and Reference Guide*. (PF6-4407)

## XFCCell and XFBR in Document Variables

XFCCell and XFBR are supported in document variables, and their content will update when the document is refreshed. The Object Lookup includes XFCCell and XFBR syntax under Extensible Document Settings. (PF6-4407)

## Dynamic Extensible Documents Parameter

The parameter FormatAsString = True will display your Excel named range as a string instead of a table in Text Editor or a Word document. This optional parameter defaults to False. The Object Lookup includes the parameter syntax under Extensible Document



Settings. See "Insert Excel Sheets and Excel Named Ranges in Microsoft Word" in the *Design and Reference Guide*. (PF6-4407)

## Dynamic Grid Component

The Dynamic Grid Component displays data in a grid from a Workspace Assembly-driven data source. It enables you to read data from various sources, transform that data, and write it back to any specified target. This offers a flexible and high-performance feature for managing large datasets. See "Dynamic Grid" in the *Design and Reference Guide*.

## Enhancements

### Dashboards

- **New Dashboard Types:** The Dashboard Properties include the following options for Dashboard Type: Embedded Top Level and Embedded Top Level Without Parameter Prompts. These top-level dashboards have their own parameter resolution and rendering stages. They also allow for their own Load Dashboard Server Task to be run apart from the Top Level dashboard. (PF10-82)

### Smart Integration Connector

- **Enhanced Remote Business Rule Debugging:** Added `BRApi.Utilities.IsRemoteDtoSuccessful` to validate a successful request is received before further processing. See Business Rules in the *Smart Integration Connector Guide*. (PF7-8518)

## Spreadsheet and Excel Add-In

- **Add Parameter Selectors to Sheet:** When creating a new Cube View Connection, select Add Parameter Selectors to Sheet to automatically create parameter selectors from the chosen Cube View and add them to the sheet. These parameter selectors (in the form of both drop-down menus and freeform inputs) will interact with your Cube View and refresh the worksheet in real time as they are changed. Nested parameters will automatically change to match the parameters they are dependent on. (PF8-997, PF8-1822)
- **Enable Preserve Excel Formatting:** In Preferences, use the Default Settings for Preserve Excel Formatting section to define whether Excel formatting is preserved by default for Quick Views, Cube Views, or Table Views. (PF8-1102, PF8-1700, PF8-1701)
- **OneStream Ribbon and Context Pane Turned Off in Excel When in Read-Only:** When viewing a workbook with read-only permissions, certain functionalities are restricted. Both the OneStream ribbon and the Context Pane are partially turned off, limiting the ability to perform certain actions and access specific features. (PF8-1696, PF8-2696)
- **Use Multithreading for Retain Formulas in Excel Add-In:** In General Preferences, the option to Use Multithreading for Retain Formulas has been added. When set to True, processing steps for collecting and applying formulas for each worksheet will run concurrently and allow for a faster refresh rate. (PF8-2307)

## Dashboard Filter Editor Component

- **Picklist Filter:** This new filter updates the behavior of picklists to improve load times if you have large tables as a source. The filter can be set to disable all fields from using the picklist or to allow only string or number fields. See Dashboard Filter Editor. (PF5-4502)

## Web Content Component

- **Show Borders Property:** You can add or remove the border around a Web Content dashboard component using the Show Borders property. (PF6-7109)

## IdeaStream Enhancements

- **Create Quick View Using POV from Selected Cell for XFGetCell:** Right-click on a cell containing an XFGetCell, or use the Quick Views menu from the ribbon to create a Quick View using the POV from the highlighted XFGetCell function. (PF8-1074, PF8-1915)
- **Create Quick View Using POV from Selected Cell in Drill Down View:** When working on the Drill Down page from an XFGetCell, Data Explorer, Cube View Connection, or Quick View, you can right-click on a cell for the option to create a Quick View using the POV from the selected cell. (PF8-1819, PF8-1908)

## Fixed Issues

### Modern Browser Experience

- **Timeout:** Users will no longer be logged out unexpectedly while they are active. (PF4-11319, PF4-11324)
- **Cube Views:** The Can Modify Data setting is consistent in the Windows Client and Web UI . When set to False, data is no longer editable. (PF4-11443)
- **BI Viewer:** Parameters pass as expected from Cube Views to BI Viewer and trigger a refresh. (PF3-14317)
- **Search:** Parameters contain the entire value entered in search. (PF3-14766)
- **Workspaces:** To achieve parity between the Modern Browser Experience and the Windows Application Filter Editor Dashboard Component, the following filters were removed from the Winows Application version: Is Not Between, Not And, and Not Or. (PF5-4467, PF5-4466)

### SQL Table Editor

- **SQL Table Editor and Grid View:** When hiding and reordering columns in grid settings, the order that you set is the order that displays in the grid after saving. Prior to this fix, if you hid a column and then reordered columns below the hidden column, reordered columns would display at the end of the grid after saving. (PF1-10835)

## ClickOnce Shortcuts

- **ClickOnce Shortcut Icon:** The OneStream logo will be displayed on ClickOnce Windows Shortcuts created using version 9.0 and higher. See "Deployment using ClickOnce" in the *Installation and Configuration Guide*. (PF7-9630)

## Smart Integration Connector

- **Creating a New Gateway:** After creating a new Gateway, the focus remains on the new Gateway. The attributes of the new Gateway are displayed. (PF7-4065)
- **Multiple Redundant Local Gateway Servers:** Support added for queries over 1 million rows and the use of Smart Integration Connector Functions that query for long-running jobs. (PF7-8499)
- **Remote Business Rules Max Rows:** Remote Business Rules will return greater than 1 million rows without adjusting the paging threshold default. (PF7-9902)
- **Remote Job Status:** Processing time to complete has been increased from 30 seconds to 3 minutes. (PF7-9904)

## System Tools

- **Database:** Schema added to database table names that allows for all tables to be viewed. See "Using System Tools" > "Database" in the *Design and Reference Guide*. (PF7-8658)

## Miscellaneous

- **Parameters:** Nested parameters within Cube Views and Dashboard Cube View Components will render. The Workspaces containing these Cube Views and Nested Parameters must be set to Shareable. (PF6-7518, PF6-7561)
- **Data Management:** Data Management Sequences and Steps using Literal Parameter substitutions will resolve. (PF6-7104)
- **Dynamic Extensible Documents:** There is no unexpected extra spacing in the cells when you are embedding Excel content within XFDocs through Document Variables. (PF6-7484)
- **Workspaces:** Updates were made to the CopyOrMoveRelationship BRApi to reduce the time needed for members to update. (PF6-7576)
- **Workspace Assemblies:** Business Rules that reference a Workspace Assembly with a "." in its name, for example, Core. Extensions, will compile successfully. (PF6-5581)
- **Large Date Pivot Grid:** The Large Data Pivot Grid field has been enhanced to more efficiently handle large data sources and address issues with loading. (PF5-4560)
- **BRApi GetCalculatedFXRate:** The default behavior of BRApi GetCalculatedFXRate to return calculated amounts has been corrected to properly retrieve Inverse, Triangulated, and same source and destination currency rates. (PF5-4558)

# Deprecation

- OpenXMLPowerTools will be deprecated in a future release. Applications that currently reference OpenXMLPowerTools libraries should begin planning to transition to Microsoft OpenXML libraries to ensure continued support and compatibility with future platform versions. (PF1-10998)
- VPN or ExpressRoute used with OneStream cloud on Platform Releases prior to 8.0.0 reached End of Service on 31 August 2024. All customers using VPN or ExpressRoute who are upgrading to Platform Release 8.0.0 or later will be required to migrate to Smart Integration Connector to integrate with local data sources. Cloud customers remaining on Platform Releases 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. 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.
- The OneStream Roadmap for Cloud Infrastructure has identified WINSFTP, typically used in Secure File Transfer Protocol (SFTP) data integration processes, will be deprecated in a future release. A more specific time frame will be announced when available. As of August 2024, both WINSFTP and SSH.Net will be supported for SFTP file transfers. The best practice for new customers is to use SSH.Net for SFTP tasks. Existing customers are advised to determine if their environments make use of SFTP and begin the process of transitioning any WINSFTP operations to SSH.Net. For assistance in evaluating an environment, contact OneStream Support. Additional information on SSH.Net can be found in the *Smart Integration Connector Guide*.

- The following BRApis are scheduled for removal in the next OneStream release in a manner consistent with our sunset policy: `BRApi.Utilities.EncryptText` and `BRApi.Utilities.DecryptText`. Please update your Business Rules to use Key Management - Secrets found within the Cloud Administration Tools Marketplace Solution, or integrate with your own third-party secrets provider. (PF7-4417)
- Customers currently on Platform Release 8.0.0 and 8.1.0 should be advised that Microsoft has announced end of support for .NET 6 on 12 November 2024. Click [here](#) for more information. Future OneStream versions, beginning with Platform Release 8.2.0, will be based on the current long-term supported release .NET 8. Refer to the [Platform v8+ Upgrade Forum](#) in ONECommunity for more information.

The following solutions will be moving to OpenPlace in August 2025:

- Excel Add-In Installer (XLI)
- Data Entry 123 (DFM)

The following solutions will be sunset in August 2025 and will no longer be supported by OneStream:

- Load Test Suite (LTS)

## Upgrade Information

Refer to [Requirements](#) for important notices and details regarding planning your upgrade.

- The Microsoft OpenXML library was upgraded to 3.1. Changes might be required to Business Rules that reference this library. (PF1-10984)
- The Database Upgrade Utility now supports the option `UseDatabaseProcessing90` (this is the default if not specified), and its opposite `UseServerProcessing90`, which



determines where the bulk of the work will be run when upgrading to the 9.0 schema. If the option is not specified, a default value is used. (PF9-1553)

- Framework and application database schema updates are required for this upgrade. Full database backups are recommended. See the *Upgrade Guide*.
- Platform code migrated from System.Data.SqlClient to Microsoft.Data.SqlClient. See "Platform Version 8.0+ Readiness" in the *Upgrade Guide*. (PF7-1295)
- .NET 8 Desktop Runtime must be installed to local desktops and laptops to successfully operate the Windows Application Client in a Platform Release 9.0 environment. See the [Platform v8+ Upgrade Group](#) in ONECommunity. (PF7-3087)
- To use the Modern Browser Experience for Platform Version 8.4+, you no longer need to log a ticket or contact your Customer Success Manager. On Platform Version 8.4+, the Modern Browser Experience will be included with every release.
- The IP address of your OneStream environment will change when you upgrade to version 9.0+. If your IT has an outbound allow list (for example, using network security systems), you may not be able to access the new version 9.0+ environment until your OneStream domains are allowed. We recommend allowing all your OneStream domains instead of IPs in relevant network security systems because the IPs will be dynamic going forward.

Domains:

- <sitename>.onestreamcloud.com
- <sitename-dev>.onestreamcloud.com

If you have questions or need assistance, open a case.

## Compatibility

- OneStream supports Windows Server 2019 and 2022.
- OneStream Client operation supports Windows 10 and 11.
- Microsoft has announced end of support for .NET 6 on 12 November 2024. Further details are available at <https://dotnet.microsoft.com/en-us/platform/support/policy>. OneStream plans to adopt Microsoft's Long-Term Support (LTS) .NET versions, which are released every two years and supported by Microsoft for three years. OneStream Platform v8.4+ uses the .NET 8 development framework.
- Task Manager PV8.4.0 SV100 is compatible with Platform Release 8.4+. To upgrade, it is recommended to perform an Uninstall UI of previous Task Manager versions, upgrade to Platform 8.4+, then install Task Manager PV8.4.0 SV100. See the *Task Manager Release Notes*.
- Standard Application Reports PV6.4.0 SV100 is not compatible with Platform Version 9. OneStream recommends using Navigation Center, which comes packaged with Platform Version 9, for your reporting needs. See the *Navigation Center Guide*.

## Security Updates

- For cloud-hosted environments, JSON Web Encryption (JWE) and Demonstrated Proof of Possession (DPoP) have been added to enhance authentication security by encrypting sensitive token data and binding access tokens to clients, reducing the risk of token interception and misuse. (PF11-179, PF11-181)
- For OneStream IdentityServer (OIS), the OIDC Local Redirect Port security feature

is required. This security enhancement will be automatically applied to all cloud-hosted OIS environments. If you have questions, contact OneStream Support.

## Documentation

- The following terms have been updated throughout the documentation:
  - MarketPlace Solution to OneStream Solution
  - PartnerPlace Solution to Partner Solution
  - OpenPlace Solution to Community Solution

## Recommendations

- OneStream will no longer provide support for authentication using MSAD and LDAP. MSAD and LDAP authentication configurations will continue to function. However, in the event of an error, OneStream Support will no longer be available for this feature.

Cloud or self-hosted customers using MSAD or LDAP are recommended to upgrade to the current release to ensure compatibility with the latest authentication libraries and protocols. Self-hosted customers can find additional information on external single sign-on (SSO) configuration in the *Installation and Configuration Guide*. Cloud-hosted customers can refer to the "Identity Providers" section of the *Identity and Access Management Guide* for configuration instructions.

Customers already using external SSO platforms, such as Microsoft Entra or Okta, should consider using those platforms with OneStream. For self-hosted customers, an alternative solution to upgrading to the current release is to select from a variety of self-hosted systems, such as ADFS, PingFederate, and Keycloak for federating

MSAD or LDAP, and Active Directory over supported protocols, such as OpenID Connect.

- If you are in a self-hosted environment, OneStream strongly encourages single sign-on with an external identity provider. To configure single sign-on with an external identity provider, see the *Installation and Configuration Guide*. (PF7-8083, PF7-8086)
- OneStream recommends that any credentialed integration with OneStream Platform should change passwords regularly.
- When referring to file paths, it is best practice to ensure cross-platform compatibility. Instead of manually using ‘\’ for file path locations, we recommend the use of Path.Combine. This function seamlessly handles the path separators ('\’ for Windows, '/' for Unix-based systems), making your code consistently functional regardless of the operating system.
- Referencing parameters with the same name in separate Workspaces will often result in incorrect values displaying in the processed UI. As a best practice, keep parameter names unique when referencing parameters across Workspaces. If what needs to be run is contained within one Workspace, then this is not a concern. (PF6-6555)

## Notes

- Customers in the OneStream-hosted environment will use OneStream IdentityServer for authentication and can manage identity providers (IdPs) and personal access tokens (PATs) in the Identity & Access Management Portal. See the *Identity and Access Management Guide*.

## Known Issues

See *Known Issues*.

## Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)