



Excel Add-In Installer Setup Instructions

PV 710 SV 100

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Excel Add-In Installer Overview

The Excel Add-In Installer Solution provides a method for self-service distribution of the OneStream Excel Add-In and OneStream Client API. This solution supplies a framework for hosting the client setup files and sharing them to OneStream remote users within an organization.

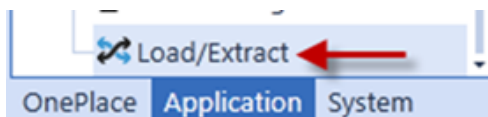
Excel Add-In Installer Setup


Setting up the Excel Add-In Installer Solution is broken into the following steps.

How to Install Excel Add-In

Download the Excel Add-In Installer Solution from the MarketPlace. The package is a zip file named *XLI_PVxxx_SVzzz_PackageContents.zip* where xxx and zzz represent version numbers for OneStream and the solution. The PVxxx number (such as 710) represents the minimum Platform Version (for example, 7.1.0) required in order to implement this Solution Version (SVxxx).

Log into OneStream, navigate to **Application Tab > Tools > Load/Extract**.



Click **Select File**, navigate to the zip file, and click **Load** .

Navigate to **OnePlace > Dashboards > Excel Add-In Installer > Excel Add-In Installer** to confirm the solution has been loaded into the OneStream application. See [Settings](#) for completing the solution setup and uploading the OneStream client installation files.

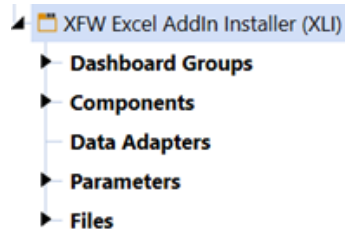
Package Contents

It is not recommended to rename or modify the included Dashboard Components or Business Rules that are included with this solution.

Dashboard Maintenance Unit

XFW Excel Add-In Installer

This is the solution Dashboard Maintenance Unit that provides all of the Dashboard Components for the solution user interface.



Business Rules

XLI_SolutionHelper

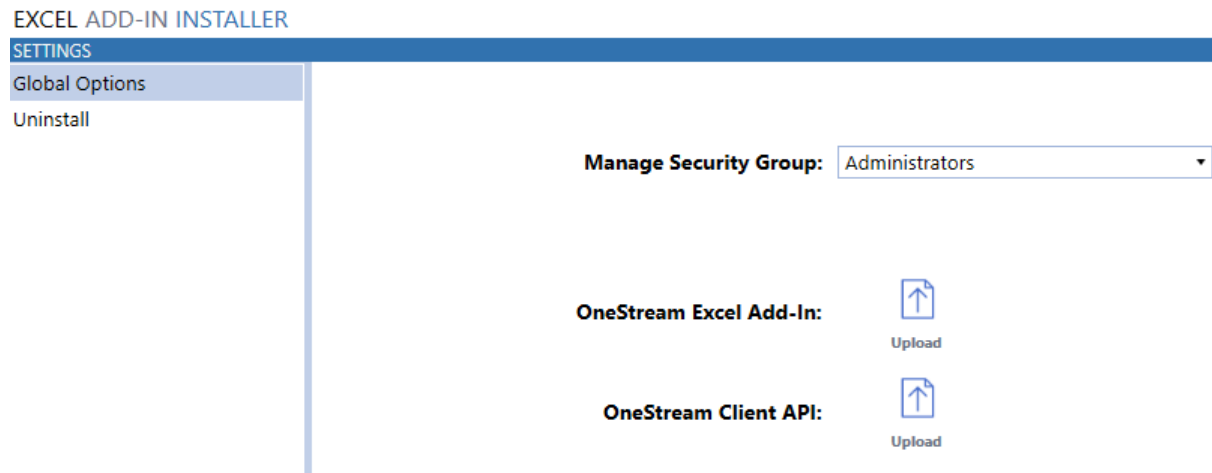
This is a Dashboard Extender Business Rule that provides various helper functions for the Excel Add-In Installer solution. These helper functions include management of the solution setup, uploading client installation files and uninstall functions.

XLI_ParamHelper

This is a Conditional Parameter helper functions XFBR String Business Rule. This rule is used to provide conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

Settings

The Settings screen contains all of the setup options for the OneStream Excel Add-In Installer Solution.



Global Options

Manage Security Group

The security group that can access the *Settings* page and upload OneStream client installation files (.msi).

Uploading Client Installation Packages

There are a few important notes to consider before uploading the client installation packages to the OneStream server environment. This solution uploads the client installation packages to the Framework Database for the OneStream server environment. This allows one upload per platform release to be shared with all of the applications in that server environment.

The client installation package uploads should be done during off-peak hours for the best performance. The OneStream Windows client should be used for the uploads for best upload performance.

Upload OneStream Excel Add-In



Upload The link to upload the OneStream Excel Add-In installer file to the server environment. This will open a dialog to select the source *.msi* file to be uploaded. The upload times to OneStream Cloud environments may take a few minutes to complete. It is important to upload the correct Platform Version of the installation files for the environment. This installation file should be updated with each OneStream Platform version upgrade.

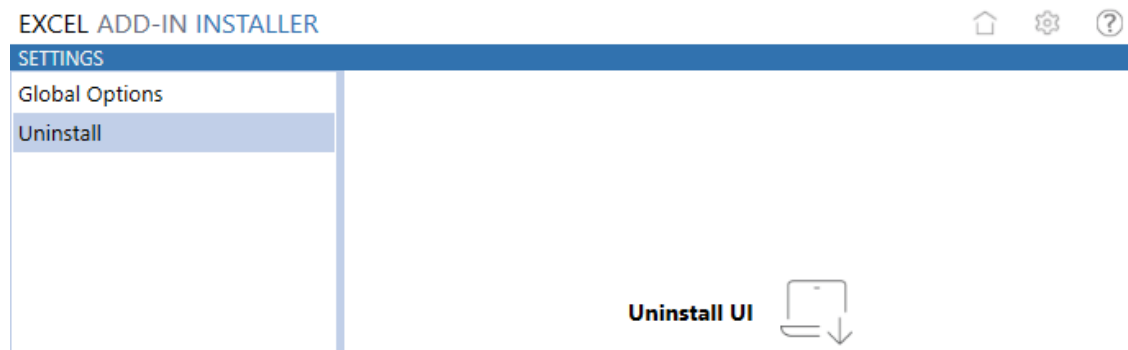
Upload OneStream Client API



Upload The link to upload the OneStream Client API installer file to the server environment. This will open a dialog to select the source *.msi* file to be uploaded. The upload time to OneStream Cloud environments may take a few minutes to complete. It is important to upload the correct Platform Version of the installation files for the environment. This installation file should be updated with each OneStream Platform version upgrade.

Uninstall

The Uninstall screen enables the removal of the Excel Add-In Installer solution User Interface (UI).



Uninstall UI

The Uninstall UI button opens a dialog to confirm removal of the Excel Add-In Installer solution UI.

Confirm Uninstall (UI)

Uninstall User Interface?

Uninstall

Close

Excel Add-In Installer Solution

This section provides information on how to use the Excel Add-In Installer.

Download Client Installations

Navigate to **OnePlace > Dashboards > Excel Add-In Installer > Excel Add-In Installer** to display the solution dashboard. Follow the instructions displayed on the solution dashboard.

1. Close the current versions of the clients that are installed. (Close OneStream Excel Add-In.)
2. Uninstall OneStream Excel Add-in (if currently installed). This can be done by going to the Microsoft Windows **Control Panel > Programs > Programs and Features > Uninstall** to select the current version of the client that is installed. Right-click the client and select **Uninstall**. Follow the prompts to complete the uninstall.
3. Return to the OneStream Excel Add-In Installer dashboard. Click on the button for the OneStream client (OneStream Excel Add-In) that needs to be installed.

This downloads the installation file and initiates the installation process. Follow the prompts to complete the installation.

Excel Add-In Installer Solution

EXCEL ADD-IN INSTALLER

HOME

Step 1

Close Microsoft Excel if currently running on your computer.

Step 2

Uninstall OneStream Excel Add-In and/or OneStream Client API (if currently installed).

Step 3

Click To Install:

OneStream Excel Add-In

OneStream Client API

Solution Database Migration Advice

This solution does not install database tables and the setup process is easily maintained. It is recommended to install this solution in the primary OneStream application in each server environment that requires self-service access for users to install the OneStream client (Excel Add-In and Client API) on their computers.

Optimal Display Settings

OneStream and MarketPlace solutions frequently require the display of multiple data elements for proper data entry and analysis. Therefore, the recommended screen resolution is a minimum of 1920 x 1080 for optimal rendering of forms and reports.

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any Custom Scaling options.

Modify MarketPlace Solutions

A few cautions and considerations regarding the modification of MarketPlace solutions:

- Major changes to business rules or custom tables within a MarketPlace solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.
- If changes are made to any dashboard object or business rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the MarketPlace solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and dashboards.
- If modifications are made to a MarketPlace solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a dashboard do not impact upgrades significantly. Making changes to the custom database tables and business rules, which should be avoided, will make an upgrade even more complicated.