OneStream Release Notes

6.4.0 Release

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6.4.0 Release Notes OneStream

Release Date: 2021

Introduction

OneStream 6.4.0 is a minor release containing new features, enhancements to existing features, and API additions. The features of this release were developed to enhance the design capabilities, performance, and improve ease of use of applications. Designers, system administrators, and users will benefit from the enhancements across their application.

Important Notes

Prerequisites

Refer to *Upgrade OneStream* for important notices and details regarding planning your upgrade.

Compatibility and Important Notices

Refer to *Upgrade OneStream* for information on compatibility of the OneStream Studio and OneStream Excel Add-in versions.

OneStream users are encouraged to adopt the OneStream Windows App. The OneStream web interface has been developed using Microsoft's Silverlight web browser plug-in. Microsoft officially announced in 2012 that development of Silverlight will be discontinued with support ending 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 through the HTML5-based OneStream Mobile and OneStream Excel Add-in. OneStream will not support the Silverlight-based web browser interface beyond 2021.

OneStream version 5.3 was the last version to support the Windows 7 operating system. Windows 7 is no longer supported as a client operating system as of January 14, 2020, in line with Microsoft's mainstream support policy.

OneStream 6.*x* will be the final release series that includes the OneStream Studio Client which is used for custom report development. After the 6.*x* series, future releases will eliminate the need to install Studio Client. Report designers will be required to use the Report Designer in the Dashboard Report Component feature.

Schema Update

For OneStream 6.4.0, you are required to perform a Database Schema Upgrade on the Framework and application databases when upgrading from version 6.3.1 and prior using the OneStream Database Configuration Utility.

New Features

Platform Documentation Set

For the 6.4.0 release, the Platform documentation will be available as a documentation package.

When you click the Help icon from the OneStream Platform application, a documentation package will launch.

> **Note:** You can still access all of the Platform documentation in PDF format from the MarketPlace download site. (24349)

Direct Load

Direct Load is a new Workflow Import type that combines the Import Validate and Load processes into a single workflow step. The Direct Load Worklfow has a performance advantage over the standard Import Workflows. Stage Source and Target records are not stored in tables. This is a new in-memory process designed for data integration to a Cube that may be operational in nature, where audit and history are not required. Therefore, it is not intended for book-of-record data. Supporting the new Direct Load Workflow, there are new business rules to determine workflow types, query information tables, error management reporting, and analyzing results. (26190, 26193)

Transformation Rules Optimization

The addition of a new Workflow Import Integration Setting optimizes Transformation Rules performance by eliminating unnecessary rule processing. Use the **CachePageRuleBreakoutInterval**property to specify how many rules to process before determining the completeness of each data Cache Page. At each interval, the current Cache Page is checked for completeness. If incomplete, the Transformation Rules will continue to process, by rule group, until the Cache Page is fully mapped, at which time processing stops regardless of subsequent remaining rules. (23338)

Workflow Lock/Unlock History

All Lock/Unlock activity can be audited by Workflow, Workflow Channel, User, Time Stamp, and Status. The Lock History displays the User Name, Reason, and activity detail in the Workflow Audit report or can be used in Dashboards with the WorkflowLockHistory Data Adapter Method Query. (23951)

Table Views Simplified Data Sources and Formatting

Table Views Business Rules has a new function, PopulateFromDataTable, which simplifies creating a Table View source data table. The new function includes properties to automatically define a header row and utilize the source data table's column field data types. The presentation of Table Views has also been enhanced with new formatting capabilities using the HeaderFormat and ColumnFormat functions. Formatting options support applying colors, widths, styles, background color and font options. ColumnFormat supports value formatting for number of decimals and percentage signs that emulate Excel to provide additional ease in report formatting and generation. (23634)

File Share Explorer Large File Support

You can manage large files from within your application using the File Explorer. This eliminates the need for Azure clients to manage files through support requests or direct server access. The File Share's Application and System directories contain a **Content** folder, designed to be the repository for large file content, such as Video or other large files. Access to the Content Folder is fully managed using new security roles for Manage, Access and Retrieve which allow usage of the stored data to support any design requirement. (24267)

Requested Enhancements

The SQL Table Editor save settings includes a freeze bar. (25064)

Workspace, Blend has been added to Workflow Settings. (26244)

Microsoft SQL Server 2019 is supported. (21993)

The calendar component includes minimum and maximum date buttons. (23426)

Microsoft Windows Server 2019 is supported. (20386)

The SQL Server Lock Escalation Mode for partitioned tables is automatically set to **Auto**. This update allows SQL Server to more efficiently manage memory resources when writing records, which enhances performance in the Stage and Load Cube processes. (26203)

Fixed

In the Config File, if you change the multi-threading settings using the AppServer Config Utility it will save correctly. (14589)

The date selector shows the correct region when non-US regions are selected. (25279)

The Table View Status column shows column headers when the values are dynamic. (23445)

The OneStream Excel Add-in remains active when embedded in Excel with third-party applications.. (24904)

When the dashboard spreadsheet component is downloaded using the **Save As** option XFGetCell works. (21969)

When BI Viewer cards are selected, the selected card highlights correctly.(20344)

In Excel Add-In **Display Context Pane** unchecks when you manually close the OneStream pane. (20576)

When you scroll through a grid, the Windows application does not freeze or cause a high CPU rate. (24307, 24053, 24288)

During workflow profile steps **Certify** and **Confirm** show. (24465)

When the cell containing the time dimension uses a custom format to display the date in the OneStream time style, XFGetCell functions calculates correctly. (25092)

When the **Date Selector** header is highlighted, the **Create Dashboard Component** icon is enabled. (25240)

In the **Date Selector** component, the today button displays today's date. (25860)

Known Issues

Customers upgrading from BI Blend version 5.3 using the old syntax of **NotUsed;SSOnly** must edit the BI-Blend Aggregation Control properties. The **NotUsed** parent placeholder must be substituted with **Root**, or a valid parent member; **NotUsed;SSOnly** to **Root;SSOnly** or as **parentmember;SSOnly**. (24481)

LoadCustomTableUsing Excel function to convert numbers. This is how Excel handles decimal values and percentage formatting. (21787)

In Preferences > Culture, BI Viewer can crash when you change the culture from English. (22601)

In Dashboard studio designer, the data member does not display the data set fields tree on order to allow a section of a row. (22213)

If you create a custom selection style for a cube view with a border or pattern, the color won't show in the palette, but it will show in the cube view. (21638)

"Object reference not set to an instance of an object" error displays when a spreadsheet component is referenced in an embedded dashboard when a different tab is selected before going back to the Dashboard tab. (21620)

If you click the Data Inspector in BI Viewer or BI Designer, and minimize in print preview, the application freezes. (20903)

Text wrapping will not work with a Cube View which uses Cube View Extender Rules. It causes Reports to incorrectly format data. (20635)

When launching the palette, the border properties can't be previewed in the dialog. This is a technical limitation within Excel. (20199)

OneStream Desktop Application does not open in Windows Native version if MS Edge browser with Edge Chromium has support for Clickonce disabled. You must enable Edge Chromium support for Clickonce. (19757)

If running on Windows 2012 R2, requestFiltering removeServerHeader="true" needs to be removed from the config files, as it is only supported for IIS 10. (18662)

If Process Selection Changed for Inserts is set to False and you add a new row, the lower dashboard refreshes and the time updates. (18458)

Using Cube View Excel Style Formatting, if more than one row or column returned uses the same label, then only the first occurrence will support the style. Unique styles are required. (17287)

In Cube Views with nested expansions the Member Name and Description wraps when viewed as a report. (16083)

Non-Administrator Application Pool User Returns Errors for PerfLib and PerfNet When Recycling IIS and Background Intelligent Transfer Service When Using "Recycle App Pool". (14336)

If your security protocols do not allow use of the click once client and you use the desktop client to install, the first time the install is performed as a silent install. If you need to upgrade, uninstall does not work. There is a workaround. (11184)

The XF Dox Builder may not correctly update Table of Contents page numbering when content is added. (10704)

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)

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)

Excel Extensible Documents may not retain the margin and print area formatting when assigned to a OneStream Book of reports. (9052)

Monitor displays set for over 125% may impact complex Dashboards by partially hiding content. The Windows Application content zoom is recommended. The optimal display is 1920 x 1080 resolution. For the Windows desktop application, we recommend setting the scale to 100% and using the zoom functionality to zoom in. This is especially helpful in dashboards such as People Planning and Reporting Compliance. (6255)

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)

When navigating to a Linked Cube View, the drill-down feature may not properly open a source document. (3056)

The Report Preview may Error in a Cube Views that are Sharing Rows/Columns and they both have the same row or column names. (2651)

Contact Support

To contact OneStream support, first register at our support site http://support.onestreamsoftware.com and then email support@onestreamsoftware.com.