



OneStream Release Notes

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Platform Release 9.1.0

The theme for this Minor release is new features and enhancements.

See the 9.1.0 Release Highlights course on OneStream [Navigator](#).

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Highlights

- The Modern Browser Experience was enhanced this release through a variety of bug fixes as well as performance and accessibility improvements. Additionally, the Cube View Designer is now available for use.

New Features

Cube View Designer

The Cube View Designer is a new feature for the Modern Browser Experience that provides permitted users the ability to view and edit the underlying configurations of a Cube View from OnePlace. Before making any changes to a Cube View using the designer, users have the ability to preview them. See "Cube View Designer" in the *Modern Browser Experience Guide*.

Profiler

Use Profiler to capture every event run in a user session, such as Business Rules, Formulas, and Workspace Assemblies, enabling you to view the input and output of a method or function. This information can then be used to help troubleshoot any performance issues. See "Profiler" in the *Design and Reference Guide*.

Dimension Member Alias

With the Dimension Member Alias property, you can add optional aliases to dimension members. This enables you to use alternate names for dimension members in new or existing solutions without disrupting existing solutions that reference the main dimension member names. See "Configurable Dimensions" in the *Design and Reference Guide*.

Enhancements

Dashboard Components

- **Data Adapters:** New methods to select Scenario Types, Dimension Types, and Dimensions were added. (PF9 -1572)

Journals

- **Bulk Selection of Time Periods:** You can select time periods for all journals in a copy job at once, rather than having to select time periods individually for each journal. This streamlines the journal copying process and improves efficiency. (PF1-9298)
- **Input Journals Workflow Page:** The Input Journals Workflow page is redesigned in the Windows Application. It provides enhanced productivity and improves the overall user experience.

Rebranding

- **Rebranding:** In the Windows Application, the Pivot Grid column shading is updated to improve visibility. (PF6-7097)
- **Rebranding:** DevExpress components' border colors are updated to improve contrast and visibility. (PF6-6930)
- **Rebranding:** The Logo dashboard component is updated to display the rebranded OneStream logo by default. (PF6-6525)
- **Rebranding:** The global scroll bar color is updated to make it easily visible across all pages and screen resolutions. (PF6-6493)
- **Rebranding:** The Report Viewer's border and divider line colors are updated to improve visibility for distinct sections. (PF6-6382)
- **Rebranding:** The Report Designer toolbar icons are updated to reflect rebranded coloring. (PF6-6290)
- **Rebranding:** In Text Editor, the collapsed Main document comments pane's banner text color is updated to improve readability against the background color. (PF6-6282)
- **Rebranding:** The Cube View Designer tab's Rows and Columns icon colors are updated to improve visibility. (PF6-6279)

Miscellaneous

- **Scrollable Dashboard Controls:** This property enables you to configure the position of the scroll bar upon refresh for Horizontal Stack Panel and Vertical Stack Panel dashboard layout types. (PF6-7111)
- **IsEnabled Property:** You can enable or disable a Button component with this Display Format property. (PF6-5216)

Spreadsheet and Excel Add-In

- **Copy and Paste Quick Views:** Copy and paste an existing Quick View to the same sheet or a new sheet in the Spreadsheet tool by using the Quick Views ribbon icon or the right-click menu. (PF8-1329)

IdeaStream Enhancements

- **Copy and Clear Data Cell Attachments:** Two new Data Management Steps are now available, which allow the copy and clear of Data Cell Attachments. These are defined by the Data Units, level of detail, and filters to clear or copy to Scenario and Time. See "Steps" in the *Design and Reference Guide*. (PF5-4374)
- **Transformation Rules Summary Display:** The display on Transformation Rules shows a summary of the rule types, including the number of that rule type. (PF5-4258)
- **Cube View Conditional Format Setting:** The Cube View Data Cell Formatting offers additional conditional format filters for Security types Read Access and Write Access, as well as annotations filters for Has Attachments and Is Annotation Type View Members. For the Has Attachments filter to function, the Include Cell Attachment Status must be set to True in the Cube View. See "Create Conditional Formatting" in the *Design and Reference Guide*. (PF5-4299)

Fixed Issues

Journals

- **Journal Template Import:** Journals imported using CSV or Excel templates with the journal type set to Auto Reversal will import as standard journals. (PF1-11155)
- **Unbalanced Journal Display in the Modern Browser Experience:** In the Input Journals interface, you can enter negative values in the debit column of journal line items as needed. The system correctly calculates journal variance, accurately reflecting whether a journal is balanced. (PF1-11174)
- **Discrepancies in Out Of Balance Journals:** In the Input Journals interface, journal line items retain and display full precision up to nine digits after the decimal. This improves accuracy and transparency and allows for the variance to show full differences, not rounded display values. (PF1-11160)

Modern Browser Experience

- **Cube Views:** Users can edit View Dimension cells in Cube Views when the Can Modify Data property is set to True. (PF4-11322)

Dashboard Components

- **BI Viewer:** BI Viewer components will render in Dynamic Dashboards. (PF6-7932)
- **Large Data Pivot Grid:** Fields in the Large Data Pivot Grid dashboard component are not duplicated. (PF6-7038)

- **Button Component:** The Button dashboard component respects the Selection Changed Server Task value, ensuring that Business Rules are run on the designated servers as configured. (PF7-9772)

Smart Integration Connector


- **Password Encryption with REGEX Escape Characters:** Password encryption and connection is successful if a password contains regular expression (regex) escape characters. (PF2-15825)

Spreadsheet and Excel Add-In

- **XFGetCell Bracketed Value:** Bracketed member names referenced in XFGetCell formulas in both Spreadsheet and the Excel Add-In will return a value when a space or period (.) is included in the member name. (PF8-2738)
- **Preserve Text Formatting:** When Preserve Excel Format is enabled on Quick Views or Cube Views, custom formatting will remain unchanged when the POV is updated. (PF8-2530)
- **Improved Application Close Speed:** Excel now closes faster when logged in to the Excel Add-In. (PF8-2640)
- **Save Offline Copy:** Offline copies can be saved to a OneDrive folder from the Excel Add-In without causing an error. (PF8-2800)

Miscellaneous

- **Workflow Mapping:** OneStream provides enhanced management of dimension renaming. When a dimension name is changed, references are automatically updated within the Cube's Integration settings and the Cube Dimension Name field in Transformation Rule Groups. (PF5-4500)
- **Security Groups:** Auditing for Security and Security Exclusion Groups more accurately tracks changes to Parent Group that Contains This properties for users or groups in both Group and Child Group tables. (PF5-4442)
- **Workflow Page Refresh:** Updating the Workflow View will automatically open, refresh, and update any existing Workflow pages in accordance with the Workflow Profile, Year, or Scenario changes. (PF6-7843)
- **Parameter Pop-up Window:** An existing page's processed Parameter pop-up window will not display over newly launched Workflow pages. (PF6-7847)
- **Multi-period Processing as a Batch:** When running a workflow through the multi-period processing as a batch, tasks are processed on BAT (Data Management) servers as intended. (PF7-9685)
- **Data Management Job Error:** When a Data Management job (initiated by API) is running, a 500 error is no longer returned if the server that initiated the job recycles IIS while the job is running. (PF7-9810)
- **User Names Allow Single Apostrophe:** User names can include a single apostrophe. (PF7-9970)
- **Job Assignment Improvements to Avoid Cancellation:** Jobs that are assigned to servers with a pending IIS reset initiated no longer causes the job to be canceled. (PF7-9971)

- **File Explorer:** Files that are close to the 2GB size limit may not upload. Instead, you will receive an error message. If the file size is less than 2GB, attempt to upload the file again. (PF7-9992)
- **Logging In:** While logging in to the OneStream application, if you log off using the  Logoff icon before opening an application, an error displays and the user session does not end. To end the session, select the Logoff button. (PF7-9989)

Deprecation

- The Basic Chart will no longer be available as a new dashboard component. The Basic Chart component will continue to function and support edit, copy/paste, and/or XML file loading until it is deprecated from the OneStream Platform, which is targeted for our second release in 2026.
- WinSCP, most commonly used in Secure File Transfer Protocol (SFTP) data integration processes, has been deprecated in this release, and will no longer be included in the Platform and Smart Integration Connector as a natively referenceable DLL. OneStream's recommended best practice is to use SSH.Net for SFTP integrations. Existing customers that use WinSCP and are preparing to upgrade to this release are encouraged to convert their WinSCP processes to use SSH.Net. Additional information on SSH.Net can be found in the *Smart Integration Connector Guide*.

- VPN or ExpressRoute used with OneStream cloud on Platform Versions before 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 Versions before 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 following BRApis have been removed from Platform: 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 Versions 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 Community Solutions 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.

- 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 Release 8.0 or Later 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 Version 9.1.X environment. See the [Platform v8+ Upgrade Group](#) in ONECommunity. (PF7-3087)
- To use the Modern Browser Experience for Platform Version 8.4.0 or later, you no longer need to log a ticket or contact your Customer Success Manager. On Platform Version 8.4.0 or later, the Modern Browser Experience will be included with every release.
- The IP address of your OneStream environment will change when you upgrade to Platform Version 9.0.0 or later. If your IT has an outbound allow list (for example, using network security systems), you may not be able to access the new Platform 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.
- Task Manager PV8.4.0 SV100 is compatible with Platform Version 8.4.0 or later. To upgrade, it is recommended to perform an Uninstall UI of previous Task Manager versions, upgrade to Platform Version 8.4.0 or later, 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 9.0.0 or later. OneStream recommends using Navigation Center, which comes packaged with Platform Version 9.0.0 and later, for your reporting needs. See the *Navigation Center Guide*.

Software as a Service (SaaS) Updates

- **Web Application Firewall (WAF):** After upgrading to Platform Version 9.0.0 or later, SaaS customers will automatically have their OneStream Version 9.0.0 or later instances protected by our WAF: OneStream's Web Application Firewall. The WAF enhances the security posture of OneStream's SaaS Service by providing more advanced real-time protection against common web-based threats. The WAF is aligned with industry best practices, including the Open Web Application Security Project (OWASP) top 10 attack types, to further strengthen the OneStream SaaS Service from exploits, vulnerabilities, and malicious attacks.

- **Data Tier Expansion:** Platform Version 9.0.0 and later accommodates SaaS customers that have storage needs that exceed 4TB per instance. Customers should engage Customer Success with storage inquiries.

Security Updates

- For cloud-hosted environments, JSON Web Encryption (JWE) and Demonstrated Proof of Possession (DPoP) are used 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 URL for the Documentation website is changing. Please update your bookmarks. The new URL is: <https://documentation.onestream.com/docs/>

Recommendations

- The second 2026 release of OneStream is scheduled to deprecate the Basic Chart dashboard component. Before upgrading to a 2026 Platform Release, we recommend all customers confirm Basic Chart compatibility in the Release Notes and determine if any of their dashboards are using the Basic Chart. Beginning with our second 2026 Release, the Basic Chart component will no longer function. Therefore, dashboards should use the more versatile, and browser-compatible, Advanced Chart or Bi Viewer components. In cases where a OneStream Solution is impacted by the Basic Chart component, new Solution versions will be made available on Solution Exchange to support 2026 upgrades.

Support for the Basic Chart on earlier releases will follow the policies defined in the “Product Support and Maintenance Policy” found on the Community “Commercial Terms and Conditions” page. Customers can reference OneStream Knowledge Base article KB0013842 to assist with application analysis for the presence of the Basic Chart dashboard component.

- Avoid file operations directly on the server during customizations, such as Business Rules, BRAPIs, and solutions. This prevents data loss, maintains file integrity, and avoids security and maintenance issues.
- 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 should 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](#)