



OneStream Release Notes

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Platform Release 9.30.1

The theme for this Hotfix release is addressing intermittent Microsoft OLE warnings that may be encountered when using the Excel Add-In client.

See the 9.3.0 Platform Release Highlights course [here](#).

Fixed Issues

Excel Add-In

- **Microsoft OLE Warning Handling:** Improved handling of OLE messages when the Excel Add-In client interacts with Microsoft Office. The Excel Add-In client contains improvements that reduce the occurrence of intermittent "Microsoft is waiting for another application to complete and OLE action" messages. (PF8-3618)

Compatibility

Refer to the following table for compatibility information.

Client Software	Client Compatibility
Desktop Client	Compatible - No update is required.

Client Software	Client Compatibility
Excel Add-In Client	Upgrade Required- Customers must install the 9.30.1 Excel Client
SIC Local Gateway	Compatible - No update is required.

Platform Release 9.3.0

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

See the 9.3.0 Platform Release Highlights course [here](#).

Select a link to go directly to that section:

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Highlights

Journals

- Journal functionality is improved. See [Enhancements](#).

New Features

Maintenance Unit Categories

The Maintenance Unit Category property enables you to organize related Maintenance Units. The value entered displays as a node in the navigation tree, and all Maintenance Units in this category are grouped together under that node in the same Workspace. See "Maintenance Unit Properties" in the *Design and Reference Guide*. (PF6-8788)

Enhancements

Journals

- **Server Side Journal Loading (BUX only):** Pagination for journal line items improves performance and usability when working with large journals. Rather than loading all lines at once, journal entries are now loaded in pages, reducing load times and memory usage. You will notice performance improvements for large journal processing and journal posting and unposting. (PF1-11430)

- **Final Recurring Period:** Controls how the last occurrence of a recurring journal entry is handled. It defines the logic used when a recurring journal series reaches its final period (for example, the final month or final fiscal period of the schedule), ensuring that the series ends correctly, with the correct dates, the number of occurrences, and the amounts applied in the final period. See "Recurring Journals" in the *Design and Reference Guide*. (PF1-11800)
- **Central Journal Input:** Parent adjustment workflows can post journals to entities that belong to already-certified base workflows. The system will temporarily un-certify the impacted base workflow, allow the journal to post to the appropriate adjustment workflow unit, and attempt to re-certify impacted workflows after posting. See "Central Journal Input" in the *Design and Reference Guide*. (PF1-11186)

Data Adapters

- **Data Adapters:** Enhances WorkflowAndEntityStatus and WorkflowStatus Data Adapters by adding additional pieces of information to each workflow profile. Workflow Profile Description is a clear, human-readable description of the workflow profile that better communicates its purpose and scope. Last Step User is the person who most recently completed a workflow step and it provides visibility into who last acted on that workflow. (PF1-11751)

Business Rules

- **Export BI Components to PDF Using a BRApi:** Added support for exporting BI Viewer components to a PDF using a BRApi, including server-side parameter regulation and configurable export settings. The generated PDF is saved to the OneStream file explorer. (PF8-3288)

Dashboard Components

- **Menu Component:** The optional ImageHeight and ImageWidth parameters are added within XFMenuItem. (PF6-7712)
- **Component Display Format Properties:** The LabelUnderline property is available to underline label text for each component that supports labels. (PF6-8318)

Profile Builder

- **Profile Builder Dialog Box:** The Workspace name displays with its associated groups when assigning groups to profiles. The dialog box also includes a filter that enables you to refine your search by group and Workspace name. (PF6-1814, PF6-8746)

Fixed Issues

Extensible Documents

- **Named Ranges Formatting in Word:** The formatting for Excel named ranges embedded is preserved in Microsoft Word when processed through XFDocs. (PF8-2773)
- **Named Ranges Scale-to-Fit:** When inserting an Excel named range in Microsoft Word as an XFDoc component, named ranges exceeding the page width can be scaled-to-fit so that the data remains readable within the page layout. (PF8-3317)

Spreadsheet and Excel Add-In

- **Offline Copy Retains Formulas:** Offline copies retain cell values when XFGetCell formulas are removed while using Save Offline Copy, no longer resulting in #NAME? or #VALUE. (PF8-2820)
- **Resolved OLE Error during Workbook Refresh and Submit:** Large Excel workbooks with many XFGet references will not cause OLE errors during refresh or submit operations. Refresh Workbook processes regardless of workbook size. (PF8-3267)
- **XFGetCell Drill Down with Cell References:** Drill down functions for XFGetCell formulas referencing worksheet cells or named ranges in both the Excel Add-In client and Spreadsheet. (PF8-3261)

OneStream Desktop

- **Installer Files:** The Client Software and Smart Connector .zip installer files download with the correct folder structure and content. (PF2-16378)
- **Business Rules:** You can compile all business rules and formulas to check syntax. (PF7-10618)
- **Application Zip Files:** You can extract Application .zip Files over 100 GB in the OneStream Client. (PF7-10671)
- **Drillback:** The Drillback to Web URL function displays embedded web content as designed. (PF7-10711)
- **Cube Views:** Cube Views can be renamed to include a colon in the Data Explorer. (PF7-10742)

Deprecation

- **Native Authentication:** OneStream intends to deprecate native authentication starting in the Platform Version 10.0.0 release. We recommend all customers currently using native authentication analyze their security model to determine impact to access and begin planning a transition to an external identity provider in preparation for future upgrades.

For guidance on configuring external identity providers, see the *Identity and Access Management Guide*.

- **Basic Chart Component :** 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 XML file loading until it is deprecated from the OneStream Platform, which is targeted for the second release in 2026.
- **WinSCP:** WinSCP, most commonly used in Secure File Transfer Protocol (SFTP) data integration processes, has been deprecated and will no longer be included in the Platform and Smart Integration Connector as a natively referenced DLL. OneStream recommends using 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 and ExpressRoute:** VPN or ExpressRoute used with OneStream cloud on Platform Versions earlier than 8.0.0 reached End of Service on 31 August 2024. All customers using VPN or ExpressRoute who are upgrading to Platform Version 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 earlier than 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.
- **BRApi.Utilities.EncryptText and BRApi.Utilities.DecryptText:** 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)
- **BRApi.Utilities.GetAppServerPerformanceInfo:** The Business Rule API BRApi.Utilities.GetAppServerPerformanceInfo is scheduled for removal in a future release in a manner consistent with our sunset policy. (PF7-10286)
- **Is Mobile Maintenance Unit Property:** The Is Mobile Maintenance Unit property has been removed. All dashboards will have all available drop-down settings and will not display limited options. (PF6-8120)
- **BinaryFormatter Serialization Method:** The BinaryFormatter serialization method is no longer supported in any reference case, including in business rules and Member Formulas. See the [BinaryFormatter Microsoft Learn article](#). (PF2-15930)

The following solutions will be moving to Community Solutions in December 2026:

- Sample Templates
- Excel Metadata Builder

The following solutions will be sunset in December 2026 and will no longer be supported by OneStream:

- Snippet Editor
- MarketPlace Solutions

Upgrade Information

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

- **.NET 10 Impact:** .NET 10 Desktop Runtime must be installed to local desktops and laptops to successfully operate the Windows Application Client in a Platform Version 9.3.0 or later environment. (PF-36466)
- **Smart Integration Connector:** When upgrading Smart Integration Connector and using custom database connections, you must reconfigure your connections and drivers due to DLL compatibility changes with .NET 10. See "[Upgrade Smart Integration Connector](#)" in the [Smart Integration Connector Guide](#). (PF2-16096)
- **System Time Synchronization Requirement:** All user workstations and server environments must maintain accurate system time for reliable authentication behavior. Standard industry security protocols require the client device and OneStream server to be aligned in system time. Accurate and synchronized device clocks help ensure stable authentication and consistent user access.

Before upgrading and as part of regular environment maintenance, follow this guidance:

- Configure all user machines to sync automatically with an approved internet or domain time source.
- Ensure domain policies allow devices to maintain accurate time and minimize drift.
- Any users unable to sync their system clock should work with their internal IT teams to correct the configuration.

If needed, contact OneStream Support. (PF11-1728)

- **Stage Table Implementation:** Platform Version 9.0.0 introduced a streamlined stage table implementation, yielding several benefits:

- Reduced stage table data storage
- More predictable data load performance throughout the year
- Greater database stability for customers with higher volume stage activity

If you are upgrading from a Platform Version earlier than 9.0.0, the table optimizations may require you to change stage-related queries and rules to maintain existing operational behavior.

See the [OneStream 9.0 Stage Schema Changes](#) post on Community.

- **Database Server:** As of Platform Version 9.2.0, the default rights of the Administrators group to the Database Server have been modified to be configurable. The Administrators group is no longer defaulted to have rights to the Ancillary Table Security roles. The Administrators group must be assigned to the OneStream Database Server Security roles for Access Group for Ancillary Tables, Maintenance Group for Ancillary Tables, and Table Creation Group for Ancillary Tables.

- **Database Page:** As of Platform Version 9.2.0, the Application Administrator rights to access the contents of the Database page are no longer provisioned using the Application Security role of Administer Application. Provisioning access to the content of the Database page is configured using the OneStream Database Server Security role Access Group for Platform Tables.
- **Database Page:** When upgrading to Platform Version 9.2.0 or later, ensure that access to the Database page is configured correctly so that the correct users have access to the External Databases.
- **Database Schema Updates:** Framework and application database schema updates are required for this upgrade. Full database backups are recommended. See the *Upgrade Guide*.
- **Platform Code:** 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)
- **Modern Browser Experience:** 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. The Modern Browser Experience will be included with every release.
- **OneStream Domains:** 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

- **Windows Server:** OneStream supports Windows Server 2019 and 2022.
- **Windows:** OneStream Client operation supports Windows 10 and 11.
- **.NET 8 Compatibility:** Microsoft has announced end of support for .NET 8 on 10 November 2026. Further details are available at <https://dotnet.microsoft.com/en-us/platform/support/policy>. OneStream continues to use Microsoft's Long-Term Support (LTS) .NET versions, which are released every two years and supported by Microsoft for three years. OneStream Platform Version 9.3.0 uses the .NET 10 development framework.
- **Task Manager:** 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:** Customers with Standard Application Reports PV6.4.0 SV101 (RPTA) installed must perform the following actions to upgrade to Platform Version 9.0.0 or later as Standard Application Reports, Standard System Reports, and Security Audit Reports are consolidated into the Navigation Center solution.

1. Uninstall the Standard Application Reports solution in the current Platform version before upgrading to Platform Version 9.0.0 or later. Failure to uninstall Standard Application Reports will result in business rule compilation errors when upgrading to Platform Version 9.0.0 or later.
2. After upgrading to Platform Version 9.0.0 or later, install the current version of the Navigation Center solution, which includes Standard Application Reports, Standard System Reports, and Security Audit Reports.

The current version of Navigation Center is PV9.1.0 SV100.

Software as a Service (SaaS) Updates

- **.NET 10 Impact:** .NET 10 Desktop Runtime must be installed to local desktops and laptops to successfully operate the Windows Application Client in a Platform Version 9.3.0 or later environment. OneStream continues to use Microsoft's Long-Term Support (LTS) .NET versions, which are released every two years and supported by Microsoft for three years. OneStream Platform Version 9.3.0 uses the .NET 10 development framework.
- **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

- **JSON Web Encryption and Demonstrated Proof of Possession:** 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)
- **OIDC Local Redirect Port:** 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

- **Website URL:** The URL for the Documentation website is:
<https://documentation.onestream.com/docs/>
- **Dynamic Dashboard Management:** Best practices for dynamic dashboard management have been added to the *Design and Reference Guide*. See "Dynamic Dashboard Management" in the *Design and Reference Guide*.

- **Database Server Security:** Added documentation for OneStream Database Server Security and SQL Table Access, detailing how database security properties control access to platform and ancillary tables when using the Database Page and SQL Table Editor. The documentation explains security roles, group-based provisioning, wildcard syntax, behavior for internal and external databases, and key administrative considerations to help design secure environments and properly manage access to data used by dashboards and Solution Exchange solutions. See "OneStream Database Server Security and SQL Table Access" in the *Design and Reference Guide*.
- **Date Fill Settings:** Updated documentation to clarify the supported date formats, default parsing behavior when no format is specified, and the valid date range enforced by the system. See "Source Dimension Properties" in the *Design and Reference Guide*.

Recommendations

- **Basic Chart Component:** The next 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 next 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. See OneStream Knowledge Base article KB0013842 to assist with application analysis for the presence of the Basic Chart dashboard component.

- **File Operations:** 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.
- **MSAD and LDAP Authentication:** 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.

- **Self-hosted Environments:** 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)
- **Passwords:** OneStream recommends that any credentialed integration with OneStream Platform should change passwords regularly.

- **File Paths:** 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.
- **Parameter Names:** 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

- **OneStream IdentityServer:** 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*.

End of Support

See *End of Support*.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)