OneStream Release Notes

7.3.6 Release

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Introduction

OneStream 7.3.6 is a hotfix release that addresses query performance degradation and dashboard table controls.

Framework and application database schema updates are required for this upgrade. Full database backups are recommended.

Important Notes

Prerequisites

Refer to Requirements for important notices and details regarding planning your upgrade.

Compatibility and Important Notices

- Microsoft ended support for Azure Active Directory Authentication Library (ADAL) in December 2022. As a result, we have migrated to the Microsoft Authentication Library (MSAL) for authentication and authorization.

- Microsoft retired Internet Explorer (IE) in June 2022. This affects all versions starting with 7.0.1 when IE is disabled inside of your organization.

- The OneStream Studio client for custom reporting was deprecated starting with 7.1.0. Report designers must use the Report Designer in the Dashboard Report Component feature. To install the Client API going forward, use the new stand-alone Client API installer.

Enhancements and New Features

- The OneStream Glossary PDF and HTML are live on our documentation site.

- Updated content for the Cube Views, Excel Add-in, Parameters, and Report Books sections in the Design and Reference Guide.

- Starting with version 7.3.0 of the OneStream application, Workspaces provide a sandboxed environment in which engineers can develop multiple, complex financial scenarios and organize dashboard objects. Workspaces store dashboard maintenance units (DMUs) and facilitate community development. They are the foundation for dashboards and will continue to evolve info the framework that encapsulates artifacts needed to develop business solutions.

- When downloading drill results into a CSV file from the Drill Down page, the list separator in the CSV file is determined by the culture set on your user profile. If the culture on your user profile matches that of the operating system's regional settings, the file opens correctly in Excel without first having to save the file and then importing it into Excel. (PF1-8009)

- The "Table Column Names" property is added to the SQL Table Editor dashboard component. It lets you specify a comma-separated list of database table columns to use in the SQL Select statement. As a result, only the entered columns are displayed in the control. (PF1-8267)

- Use the new .Tree property in Cube View Row Header design to express between 0 and 4 levels of hierarchical expansion in the initial display of designated row members. (PF5-594)

  - **TreeExpansionLevel1-4**: Set the number of rows from 0 to 4 to reveal the amount of nested data available in the cube view. A value set to zero will collapse all data. A value set to greater than the expansion level will expand all. If no value is set for an expansion level, it defaults to the normal RowExpansionMode behavior.

    > **NOTE:** For TreeExpansionLevel to work, RowExpansionMode from the Default Header must be set to "Use Default" and contain a .Tree Member Expansion. Using Collapse All or Expand All overrides this setting.

- Sankey Diagram is a new Dashboard Component used to enhance visualization for data flow analysis. (PF5-1840).

- Access to application help now requires authentication. (PF5-917)

- OneStream Server Configuration Utility configurations have been added to set maximum threshold for files contained in a zip file and the total size of all extracted files. (PF5-1649)

- Enable the Compatibility filter to limit some conflicts with connections and performance between the OneStream Excel Add-In and third-party add ins. (PF5-1608)

- Non-Administrators, assigned proper Application Security Roles and Transformation Rules Group security, are now granted the ability to Import or Export Transformation Rules *.TRX/CSV files. . (PF5-1618)

• Enhanced Timeout and Proxy Configurations allow for use with shorter time out sessions. (PF5-1784)

Limited Availability

Limited Availability programs control the release of designated new functionality to enable our Cloud and Support teams to manage setup and operational tasks.

- ○ OneStream IdentityServer (OIS) is an authentication platform that supports SSO integration with OIDC and SAML2P compliant identity providers (IdPs), including multiple IdPs sourced to a single OneStream cloud instance. Additionally, OIS provides generation of personal access tokens (PATs) for REST API authentication and has extended functionality for native login IDs including support to reset a forgotten password and enhanced security through password salting and hashing.

  OIS is the standard authentication platform for new customers adopting version 7.3. If you are an existing customer and require multiple authentication sources, the use of PAT, or secure native login IDs, you can request OIS in your version 7.3 upgrade. General availability of OIS will be available in the future.

- ○ Smart Integration Connector provides secure connectivity between a OneStream SaaS instance and customer data sources residing within a local network. With Smart Integration Connector you can:

- Establish connectivity between OneStream Cloud and data sources in your network without a VPN connection.

- Create and manage network data source integration using OneStream administration interfaces.

- Locally manage database credentials.

Contact your Customer Success Manager if you are interested in learning more.

Fixed

7.3.6

- The performance of consolidation processing is negatively impacted when run concurrently with a consolidation process from another application on the same Application server. This issue is predicated on the use of complex Entity dimensions with several thousand entities marked as Inter-company. Defect correction PF-3041 resolves this issue through the segmentation of the server cache by application to prevent conflicts between concurrently operating consolidation processes.

7.3.3

- Query performance degradation in cube views and data management cube exports is fixed. Performance issues were observed in queries that included empty data units, where all amounts were null. Empty data units could include unused or newly added entities, scenarios, years, or currencies. The more cells in the query definition represented by an empty data unit, the greater the performance impact. (PF5-2236 and PF5-2203)

- Unexpected column filter behavior with Dashboard table controls (grids and SQL Table Editor) is fixed. Resolved column filter irregularities include missing filter controls or valid filter logic returning incorrect results. (PF5-2227)

7.3.2

- Enhancement PF5-1020 was backed out to alleviate a Windows Client rendering performance issue. The issue occurs when performing dimension member maintenance (insert/update/delete) when ~1500+ members are displayed in an expanded state. As the number of expanded displayed members increases, the post-save refresh performance worsens and may require force-closing the Windows Client. This condition does not impact meta data maintenance to the database – just rendering performance. (PF5-1996)

- Corrective code resolves this rendering performance issue so dimension maintenance may be performed without regard to the number of expanded displayed members.

- The selected member from a Tree View component is retained as the selected member when navigating across a tabbed dashboard. (PF1-7996)

- SMTP connection string modified through OneStream Server Configuration Utility will save without alterations in the connection string. (PF5-1753)

- The DateTime error when performing Time analysis, "Tasks Running Within Time Range" and "Tasks Queued Within Time Range" on the System Environment page is resolved. (PF5-1625)

- Multiple Excel workbooks can be opened using Quick Views and Context Pane will remain open. (PF5-1539)

Known Issues

- OneStream Release 7.2.1 introduced an enhancement to the platform (PF5-1663) that refines how CalcStatus is evaluated. This enhancement addresses multi-server environments where data entry occurs within milliseconds of a CalcStatus being updated due to a calculation or consolidation.

  The system now favors over-impacting the CalcStatus to "CA." Implementors need to account for this issue when triggering a calculation or consolidation immediately after a Data Unit's calc status is impacted.

You may see this issue when creating a Dashboard Button or Event Handler rule that runs a calculation or consolidation immediately after data is saved. The current workaround is to incorporate a 1 second sleep into the beginning of your business rule using this logic: "Threading.Thread.Sleep(1000))".

- With platform version 7.1.0 and newer, you may encounter an error when loading the MarketPlace solutions Cash Planning, Capital Planning, Sales Planning, and Thing Planning. See the Knowledge Base article "Error processing XML file type ApplicationDashboards" for more details.

- Using third-party libraries in business rules causes compile errors. The solution depends on if unsupported NameSpaces are used in a business rule file or member formulas. See Upgrade OneStream. (PF2-8996)

- Data may disappear when you scroll grid and pivot grids in BI Viewer. (PF5-50)

- The time needed to save or modify a connection increases as numerous connections increase in System>System Configuration>Database Server Connections>Custom. (PF5-1926)

- VB.Net rules that are converted into C# rules require the following imports to successfully compile (PF1-7495):
    - System
    - Microsoft.csharp
    - System.linq
    - System.collections.generic
    - System.collections
    - System.text

- With the introduction of C# business rules, imported snippets must have a language type designation, either VisualBasic or CSharp. If you use the currently available snippet import template, you will receive an error when importing snippets. The workaround is to manually add a LanguageType column to the Excel template and define a value (either VisualBasic or CSharp) for each snippet. Use the following steps:

1. From the Snippet Editor dashboard, download the Snippet Import Template (or open an already populated Snippet Import Excel file).

2. Insert a new column anywhere between the existing ModuleType field and Content field and name it LanguageType.

3. Unhide hidden rows numbered 7 - 10 by highlighting rows 6 and 12, right-clicking, and selecting **Unhide**.

4. In row 10, add the following formula for the newly added LanguageType column: xfText#:[LanguageType].

5. Add snippets as usual, and in the LanguageType column, define each snippet as either VisualBasic or CSharp.

- Beginning in release 7.1.1, the stage engine no longer summarizes rows that are mapped to **(bypassed)**. If a workflow imports data that all gets bypassed, the summarization step no longer generates summary stage records. As a result, the import fails, preventing completion of the workflow.

  To workaround this issue, set the Is Optional Data Load workflow setting to True. This allows the workflow to be completed if the import fails, without needing to complete the Import-Validate-Load steps. However, this does not avoid the initial import error when all records are mapped to **(bypassed)**. To workaround a use case that deals with an Import (Stage Only) workflow that fails due to bypassed mappings, change the transformation rules to use *** to *** mappings to avoid the summarization error. (PF-26143)

Contact Support

You can continue to use the service catalog to indicate interest in upgrading to Platform v8. Customer Success Representatives will engage all interested Platform v8 candidates to review preparation activities required for a successful upgrade. Refer to the Platform v8+ Upgrade Group in ONECommunity for information and discussion.