OneStream Release Notes

8.1.1 Release

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8.1.1 Release Notes OneStream

OneStream 8.1.1 is a hotfix release that addresses Culture Code, Load Balancer Round Robin logic, unsigned executables, and report date presentation issues indentified in version 8.1.0.

For more information regarding this release, see the 8.1.0 Release Highlights course on OneStream [Navigator](#).

Highlights

- OneStream Platform offers several new journal enhancements, such as exporting, copying, and filtering journals. In addition, Intercompany Matching Reports display single intercompany transactions when an entity is trading with itself, as well as providing indicators where data is derived dynamically.

- You can continue to use the service catalog to indicate interest in upgrading to Platform Release 8.0 or later. Customer Success Representatives will engage all interested candidates to review preparation activities required for a successful upgrade. Refer to the Platform v8+ Upgrade Group in ONECommunity for information and discussion.

   - If you are upgrading from version 8.0, you should follow the traditional OneStream upgrade process and directly schedule the upgrade.

   - If you are upgrading from a version prior to 8.0, you are encouraged to engage your Customer Success Representative to review pre-upgrade preparation activities.

- We continue to upgrade workspaces with more features, such as building Data Management Objects in workspaces and filtering workspaces and maintenance units.

- Task Activity allows you to cancel a long-running cube view in several areas.

IdeaStream Enhancements

- When enabled, status emails can be automatically sent when a Data Management Sequence completes or fails. (PF5-2366)

- In the Excel Add-in, you can right-click on an XFGetCell to drill down into the details. (PF5-2648)

- In Data Explorer, you can right-click to create a Quick View using the POV from the selected cell. After you select this action, you are redirected to Spreadsheet where you can modify the Quick View.(PF5-2684)

Prerequisites

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.

- Review the *Upgrade Guide*.

Compatibility

Platform Release 8.1 is not compatible with the following solution versions:

- Application Control Manager PV710 SV101 – The upcoming Application Control Manager release PV740 SV100 is expected to be compatible with Platform Release 8.1.

- Predictive Analytics PV620 SV101 -- The upcoming Predictive Analytics release PV620 SV102 is expected to be compatible with Platform Release 8.1.

Important Notes

- OneStream recommends that any credentialed integration with OneStream Platform should change passwords regularly.

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- Platform code migrated from System.Data.SqlClient to Microsoft.Data.SqlClient. For additional information, see [Platform Version 8.0+ Readiness](#) in the *Upgrade Guide*. (PF7-1295)

- The following BRAPIs are scheduled for removal in a future release in a manner consistent with our sunset policy: BRApi.Utilities.EncryptText and BRApi.Utilities.DecryptText. Please update your business rules to utilize [Key Management - Secrets](#) found within the Cloud Administration Tools Marketplace Solution, or integrate with your own third-party secrets provider. (PF7-4417)

- .NET6 Desktop Runtime must be installed to local desktops and laptops to successfully operate the Windows Application Client in a Platform Release 8.1 environment. Refer to the Platform v8+ Upgrade Group in ONECommunity for more information.

- VPN or ExpressRoute used with OneStream cloud on Platform Release versions prior to 8.0.0 will reach End of Service on August 31, 2024. All customers using VPN or ExpressRoute who are upgrading to Platform Release 8.0 or later will be required to migrate to Smart Integration Connector to integrate with local data sources. Cloud customers remaining on Platform Release versions prior to 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.

- ERPConnect45.dll is no longer included with OneStream and Smart Integration Connector. See the *Smart Integration Connector Guide* for referencing and integrating with the new ERPConnectStandard20.dll, available on the "DLL Packages" tile on the Platform page of Solution Exchange.

- 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*.

- Client API is not supported with Platform Release 8.0 or later.

- OneStream supports Windows Server 2022.

- OneStream Client operation supports Windows 11.

- Resource Owner Password Credentials (ROPC) are no longer supported. Customers in a OneStream-hosted environment are required to use OneStream IdentityServer personal access tokens. Customers in a self-hosted environment are required to use SSO tokens. If you are currently not using either of these tokens, see Visual Basic for Applications (VBA) Procedures in the *Design and Reference Guide* for more information.

Documentation

- In the user interface, click the Help button to view the documentation from a public website.

- On the OneStream Documentation site, you can filter search results based on solution or system guide. For example, to search only the *Cloud Admin Tools Setup Instructions Guide*, type a search term then select that guide from the drop-down menu in the search bar.

- Platform documentation for previous releases, beginning with Platform Release 8.0, is available from the OneStream Documentation site home page.

- Beginning with Platform Release 8.0, the *System Architecture Guide* was discontinued. Parts of this guide were incorporated into the *Installation and Configuration Guide*, the *Upgrade Guide*, and the *Third Party Component Guide*.

New Features

Business Rules Workspace Assembly

Business Rules that use data management objects can be changed to run a workspace assembly for MarketPlace solutions allowing everything to be containerized under a workspace, including the Data Management functionality. (PF6-3681)

Data Management Objects Moved to Workspaces

Data Management Objects, such as groups, sequences, and steps, can be created and edited in two locations on the Application tab: through the Data Management page and the Workspaces page. Current Data Management Objects can be found in the Default Maintenance Unit under the Default Workspace. (PF6-3471)

Task Activity Enhancements

Task Activity has been enhanced to allow users and administrators to cancel a long-running cube view in the Windows Application, Excel Addin, or OneStream Spreadsheet. (PF6-3547)

Workspace Filters

On the Application page, you can add workspace filters to allow more control and flexibility in searching and browsing. Filters can be edited and cleared. If you log out and log back in, the filter remains unchanged until you edit or clear it. (PF6-3915)

Enhancements

- **Export Journals**: For current workflow profiles and scenarios, you can export journals from the Journals workflow toolbar to an XLSX import template file. This is useful when you want to import journals into another application, scenario, or workflow profile without the need for a business rule or having to navigate to another page. (PF1-8979).

- **Dynamically Derived Data Indicator in IC Matching Report**: A red triangle indicator displays in the cell when data is dynamically derived. This generally occurs when the intercompany matching report performs currency translations on-the-fly. (PF1-8962)

- **Copy Journals Across Scenarios**: You can copy journals into other scenarios. In the Copy dialog box, you can select the scenario in the Target Scenario field. The selection applies to all journals in that single-batch copy. This is useful when planners want to copy Actual data into budget or what-if scenarios. (PF1-9001)

- **Filtering Journal Line Items**: You can filter journal line items by clicking the filter icon in the column headings. When working with journals that contain a large number of line items, it is now easier to locate a specific subset of line items. (PF1-8994)

- **Journal Line Items Toolbar**: The Journal Line Items Action toolbar has moved to the journal line items pane. The buttons are closer to where actions are performed. (PF1-9007)

- **Updated Journal Display and Filtering**: The tree view displaying the list of existing journals on the Input Journals workflow step is replaced with a grid view. It shows Journal Status, Name, Description, and Journal Template. You can filter journals by clicking the filter icon in the column headings, and you can sort journals by clicking the journal header. The first click sorts in ascending order, the second click sorts in descending order, and the third click removes the sort.

- **Add New Journal Line Items below Existing Line Items**: Select the desired line item then click the Add Line Item button. This adds a new line item below an existing item and also copies its dimension members. This eliminates the need to manually move up each new line item to the desired position. (PF1-9060)

- **Authentication in a OneStream-hosted Environment**: In the Identity & Access Management Portal, you can add a SAML 2.0 identity provider more efficiently with auto-discovery through a metadata URL or by importing an XML metadata file. (PF7-3143, PF7-3199)

- **Auto-revoked PATs**: In the Identity & Access Management Portal, on the Manage Personal Access Tokens page, the Token Status column displays Auto-revoked if a PAT was expired and then automatically revoked when it was attempted to be used. (PF7-3187)

- **Search with Enter**: Run the search function by pressing Enter from anywhere the search function is used. (PF5-2799)

- **Search by Name or Description**: Added Search function for exact Name Only or Description Only from the Search Hierarchy. (PF5-2800)

- **Dashboard Button**: Added Member Filter Builder button to Dashboard Components. (PF5-2662)

- **Performance Enhancement**: Increased the default maximum number of consolidation threads to 64 for increased efficiency when running multiple consolidations. (PF5-3053)

- **Performance Enhancement**: Combined Save operation when processing Elimination and Share. (PF5-3049)

- **Task Activity Progress**: Increased the accuracy of task activity progress. (PF5-3046)

- **Smart Integration Connector**: Customers can test their SIC Gateways during set-up to ensure there is nothing blocking port 443. (PF7-3696, PF7-3155)

- **Smart Integration Connector**: The default Referenced Assemblies folder is located in C:\Program Files\OneStream Software\OneStream Gateway\Referenced Assemblies. (PF7-3252, PF7-3194)

- **Smart Integration Connector**: The database Connection Strings in the OneStream Local Gateway Configuration are encrypted when saved. (PF7-3121)

- **Smart Integration Connector**: Specific IPs or CIDRs (a range of IPs) can be whitelisted from the OneStream Windows Client Application. This limits traffic from the internet to the Smart Integration Connector Relay. (PF7-3129)

- **Smart Integration Connector:** The OneStream Local Gateway Configuration utility automatically opens the configuration file for the user. (PF7-3163)

- **Task Scheduler Database Change**: Workspaces name has been updated to append the Sequence Id in the Task Scheduler to allow data management jobs to run while using a specific workspace or the default workspace. (PF6-3661)

- **Parameters Ordered by Sort Order and Name**: Workspace parameters are displayed by sort order and name in alphabetical order in the parameter list. (PF6-3445)

- **Updated Compile Icons for Workspace Assemblies and Business Rules**: The Compile icons have been updated for compiling workspace assemblies and business rules. (PF6-3283)

- **XF Project File Extension Drop-down**: When extracting XF Project, the XF Project file extension has been updated from "OneStream Project Files (*.xfproj)" to "XF Project Files (*.xfproj)". (PF6-3441)

Fixed Issues

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- **Load Balancer Round Robin Logic**: The load balancer managing OneStream Interactive (INT) Servers fails to properly execute round robin logic to assign user interactive requests. This issue may result in failed logins or dropped interactive user requests during a user session. Corrective code in this hotfix restores expected round robin distribution of interactive requests and resolves login issues. (PF-31608)

- **OneStream User Culture Code Setting Ignored**: The OneStream Culture Code, responsible for numeric display, numeric data entry interpretation, and date/time display, is erroneously ignored in deference to the Windows OS culture code. The corrective code always uses the Culture Code setting assigned in the user profile for OneStream Windows Client experiences. (PF-31616)

- **OneStreamDesktop.exe is unsigned**: The OneStreamDesktop.exe provisioned with ClickOnce was not signed in Platform v8.1. Corrective code in this hotfix signs the executable to meet OneStream's security standards. There is no security risk and no functional errors associated with this issue. (PF-31604)

- **Report Viewer Date/Time Not Using UTC Time**: The date and time displayed on generated reports reflects the user's time zone rather than the expected centralized UTC time. This issue caused a time (and sometimes date) discrepancy between users viewing the same report. The corrective code centralizes the report dates and times to UTC time, as it has been in prior platform releases. (PF-31600)

- **Time-Based One Time Passwords**: To reduce the risk of unauthorized authentication requests we have added the ability to allow administrators to require a time-based onetime password ("TOTP") to be entered when authenticating with the customer's IdP and before the user credentials are validated. The TOTP generates a six character, alphanumeric code that must be entered within 30 seconds of being prompted and is only available on redirect from the successful IdP authentication. (PF7-6193)

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- **Single Intercompany Transactions**: Intercompany transactions where an entity is trading with itself (the entity is also the IC partner) are not duplicated in the workflow IC Matching Report or in the result data set of the three ICMatchingForWorkFlowUnit method types. Intercompany reports found in the Standard Application Reports solution, as well as custom reports that use these method types, automatically inherit this change. This ensures the finance group controllers are using accurate balance amounts for analysis and auditing purposes. (PF1-8774)

- **#LOGON and #REFRESH**: When using Save Offline Copy in Excel, Cube View Connections, Table Views, and Quick Views no longer show #LOGON or #REFRESH. (PF5-2798)

- **Named Ranges**: When using a cube view connection in the Excel Add-In, named ranges display properly when using "Include Cube View Header". (PF5-2645)

- **Custom Time Profiles**: Dashboard Parameters reference the proper Time Descriptions when using Custom Time Profiles. (PF5-2683)

- **Charts in PDF Viewer**: Basic and Advanced Charts display in Report Books. (PF7-2914)

- **Use Microsoft Edge**: If you attempt to launch the OneStream Windows Application from any web browser other than Microsoft Edge, you will receive a message indicating that you need to use a Microsoft Edge web browser. (PF7-3954)

- **PAT Audit Data**: If you attempt to use an expired PAT, the audit logs will capture the appropriate details, such as Client IP Address, Client ID, Subject ID, and Username. (PF7-3187)

- **Expired SAML IdP Certificates**: In the Identity & Access Management Portal, if you attempt to save an expired certificate (X509, Signed Request, or Encrypted Assertion) when adding or editing a SAML 2.0 IdP, you will receive an error message indicating the certificate is expired and cannot be saved. If a previously saved certificate has expired, it will be noted on the View and Edit screens for the IdP in the Identity & Access Management Portal. (PF7-3170)

- **Smart Integration Connector**: Resolved the unhandled exception error users were seeing after running the service on a fresh install with no gateways configured. (PF7-3177)

- **Workspace Assembly XFBR String**: The XFBR String function will search for the Workspace Assembly Service in the actual workspace instead of the default workspace. (PF6-3892, PF6-3927)

- **Parameter on SQL Table Editor or Grid View**: Parameter applied to SQL Table drop-down values will display correctly in the Table Editor instead of displaying an ID. (PF6-3621)

- **SQL Table Editor Primary Dynamic Dashboard**: When a SQL Table Editor is embedded in a primary dynamic dashboard, the extender Business Rules will call for a SQL Table editor to save inside dynamic dashboards that are the primary dashboard. (PF6-3597)

- **SQL Table Editor Dynamic Dashboard**: When a SQL Table Editor is embedded in a dynamic dashboard and that table editor has a business rule, the extender Business Rules will call for a SQL Table Editor to save inside dynamic dashboards. (PF6-3564)

- **Business Rule Encryption**: You can encrypt and decrypt business rules with any non-English culture codes. (PF6-3426)

- **XF Project Replace Cube View Groups and Cube Views**: XF Project is replacing Dashboard Maintenance Units or Workspaces with includeDescendants = true for Cube Views and Cube View Groups. (PF6-3434)

- **Workflow Profile Tooltip**: When navigating to #NotFound-PageTitleApplicationDashboardAdmin the PageTitleApplicationDashboardAdmin has been updated to PageTitleApplicationWorkspaceAdmin. (PF6-3962)

- **IntelliSense Previews**: When the developer types DataTable or DataRow in the assembly code, it will automatically complete or provide a value in the drop-down list. (PF6-4169)

- **XFUserMsgException**: When the business rule terminates execution, it will display the normal XFUserMsgException Message to User. (PF6-4140)

- **Workspace Shareable**: An error message will display if you are referencing a Workspace Assembly Service in a different workspace that is not set to Shareable. (PF6-4129)

- **Template Parameters**: You can create a new dashboard or component that contains a Display Format Property and enter a template parameter and save it successfully without it being cleared out in the user interface. (PF6-4019)

- **Saving a Text Editor File in Application and System Dashboard**: When saving a Text Editor file as a Save as Application or System Dashboard File, you can save the file in any Maintenance Unit other than the Default Workspace/Default Maintenance Unit. (PF6-3995)

- **Saving a Book File in Application and System Dashboard**: When saving a Book File as a Save as Application or System Dashboard File, you can save the file in any Maintenance Unit other than the Default Workspace/Default Maintenance Unit. (PF6-3992)

- **Saving a Spreadsheet file in Application and System Dashboard**: When saving a Spreadsheet file as a Save as Application or System Dashboard File, you can save the file in any Maintenance Unit other than the Default Workspace/Default Maintenance Unit. (PF6-3989)

- **Workflow Profile Template Dashboard Setting Visual**: The setting of the workspace dashboard name assigned visually has been updated in the workflow profile template workspace dashboard property. (PF6-3433)

- **Rest API Data Management Sequence**: REST API Previous API 7.2.0 and 5.2.0 will accept an optional Workspace Name for Data Management Sequence. (PF6-3707)

- **CryptoManager Using StreamExtensions::ReadAllBytes**: The issue involving the CryptoManager not returning all bytes is fixed. (PF7-4137)

- **REST API JSON Format**: When using REST APIs, the JSON response key tags have been reverted back from camelCase to the OneStream standard default of PascalCase. (PF7-4441)

Known Issues

- If you are in a self-hosted environment that has upgraded to Platform Release 8.1 and your Network Security settings block loopbacks, you will encounter an error with your REST API calls. To resolve this error, see OneStream Knowledge Base article KB0012911. (PF7-4202)

- The Whitelisted Domains setting in the Application Server Configuration file only allows for http and https formatted domains. References to non-http or non-https file schemes will no longer be allowed. (PF2-15004)

- If you are in a self-hosted environment using a SAML 2.0 external identity provider for authentication and encounter an error, update the ACS URL both in the Web Server Configuration file in OneStream and in the application registration for the external identity provider. Use this format:
https://<domainname>/OneStreamWeb/OneStreamLogonCallback.aspx/

  See OneStream Knowledge Base article KB0012777. (PF2-15177)

- If you are in a self-hosted environment using a Microsoft Azure AD (Microsoft Entra ID) identity provider for authentication and encounter an error, add the tenant ID in the Web Server Configuration file in OneStream. See OneStream Knowledge Base article KB0012778. (PF2-15181)

- If you are a commercial customer in a self-hosted environment using Microsoft Azure AD (Microsoft Entra ID) for authentication and encounter an error, update the redirect URL both in the Web Server Configuration file in OneStream and in the application registration in Microsoft Azure AD (Microsoft Entra ID) from https://onestreamclient to https://<domainname>/OneStreamWeb/OneStreamLogonCallback.aspx

  See OneStream Knowledge Base article KB0012781. (PF2-14668)

- If you are in a self-hosted environment using a Microsoft Azure AD (Microsoft Entra ID) identity provider for REST API authentication and encounter an error, add the claim aud in the ordered lookups in the Web Server Configuration file in OneStream. See OneStream Knowledge Base article KB0012779. (PF2-15031)

- If you are in a self-hosted environment using a PingFederate identity provider for REST API authentication and encounter an error, add the claim client_id in the ordered lookups in the Web Server Configuration file in OneStream. See OneStream Knowledge Base article KB0012780. (PF2-15027)

- Smart Integration Connector transfers data in Apache Parquet format from the Local Gateway Service to OneStream. If you are transferring a data type that is unsupported by parquet, the data returns as a string. (PF2-15235)

- Smart Integration Connector queries do not show columns that contain only null values in the results. (PF7-4194)

- When using the SQL Table Editor in a Dynamic Dashboard, the Save Event does not run properly. (PF6-3564)

- If you are running a dashboard with a button whose Navigation Action property is set to "Open Page", you must mark the non-default workspace as shareable and prefix the workspace name in the "Selection Changed Navigation Arguments". (PF6-4494)

- In Task Scheduler, tasks are running appropriately, but expired and disabled tasks are displaying in Calendar View and Grid View under Next Start Date/Time. (PF5-3281)

- The Server URL will not be displayed within the Windows Application header when Local Redirect is enabled for OneStream Hosted customers or Self-Hosted Customers using Azure AD SSO. (PF7-6479)

Solutions Moving to OpenPlace or Sunset

The following solutions will be moving to OpenPlace in August of 2024:

- Actor Workspace

- Close Manager

- Dimension Comparison Utility

- Help Desk

- PowerShell Scripting

- Process Control Manager

- Provision Request Manager

- Tax Provision

- Train Me (Video Help)

- Standard Cube View Styles

The following solutions will be sunset in August of 2024 and will no longer be supported by OneStream:

- End User Training - Cube View

- End User Training - Excel Analysis

- End User Training - Extensible Docs

- End User Training - Report Books

- End User Training - Spreadsheet Analysis

- End User Training - Videos

- End User Training - Workflow

- Process Blocker

Platform Upgrade Process

If you would like assistance with your upgrade, contact Support through the [ServiceNow](#) portal. If you do not have access to [ServiceNow](#), contact your customer success representative.