



Upgrade Guide

8.1.3 Release

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Scheduling the Upgrade

Upgrading from Platform Releases pre-8.0

When upgrading from a Platform Release prior to 8.0 to Platform Release 8.0 or later, OneStream encourages customers to prepare for their upgrade by referencing content in the [ONECommunity Platform v8+ Upgrades](#) Group and by reaching out to their Customer Success representative.

OneStream Cloud customers may initiate Platform Release 8.0 or later upgrade interest by submitting a Software Upgrade request through the Service Catalog. Requests will be routed to the corresponding Customer Success representative who will reach out to discuss preparation activities required for upgrade readiness.

OneStream self-hosted customers may download Platform Release 8.0 or later from Solution Exchange, but are also encouraged to engage their Customer Success representative to review preparation activities to ensure a successful upgrade.

Upgrading from Platform Release 8.0

Upgrades from Platform Release 8.0 to 8.1 or later follow traditional OneStream best practices. Cloud customers can initiate and schedule upgrades through the Software Upgrade request on the Service Catalog, which will be followed by a scheduling request.

OneStream self-hosted customers may download Platform Release 8.1 directly from Solution Exchange and proceed with their upgrade.

Requirements

Information Technology professionals responsible for installing, maintaining and supporting OneStream, must satisfy the following requirements to best support an upgrade. They must also review the requirements and special notes in the *Installation and Configuration Guide* and *Release Notes*.

IMPORTANT: Platform Release 8.0 and later was developed using Microsoft .NET 6 . As a result, all Business Rules must be tailored for .NET 6. For more information, see [Platform Release 8.0 or Later Readiness](#).

- OneStream Platform Release 8.0 or later requires Microsoft .NET 6.
 - App Server and Web Servers
 - Install the latest version of [ASP.NET Runtime \(Hosting Bundle\)](#) (minimum v6.0.14).
 - Install the latest version of [.NET Desktop Runtime \(x64\)](#) (minimum v6.0.14).
 - Client
 - Install the latest version of [.NET Desktop Runtime \(x64\)](#) (minimum v6.0.14).
- OneStream Servers requires IIS 7 or later.
- In each application, complete the **Compile all Business Rules and Formulas** to verify that business rules use the proper syntax.
- If your applications are referencing any 3rd party DLLs that are not provided by OneStream, verify these DLLs are .NET 6 compatible. Contact OneStream Support (support.onestreamsoftware.com) to discuss available upgrade options.
- When upgrading OneStream, ensure to update the database schema if an update is available. We recommend full database backups.
- Backup the Configuration files in your OneStream Share directory.
- For additional minimum system requirements, see [Hardware and Software Requirements](#) in the Installation and Configuration Guide.

Requirements

- When implementing SIC with the OneStream application, see [Requirements](#) in the Smart Integration Connector Guide.

IMPORTANT: Self-hosted customers must have a successful database connection prior to the Database Upgrade. See [Enable the Trust Server Certificate](#).

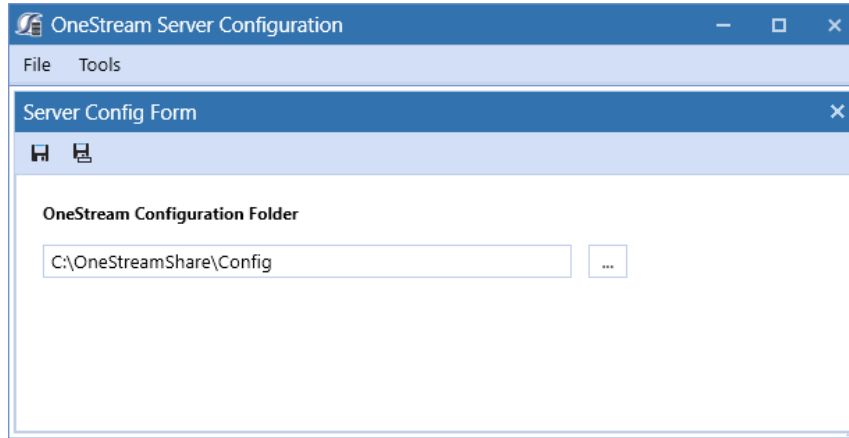
Before Upgrading

Perform these tasks before upgrading:

1. Perform a full backup of all OneStream databases.
2. Download the OneStream installation package from the [Solution Exchange](#):
 - a. Log in to the Solution Exchange and select **Platform** to get the latest version of OneStream.
 - b. Download the appropriate On-Premise package to get the appropriate setup files for the server installation.
3. Verify the location of the OneStream configuration files:
 - a. On a OneStream server, select **Start > Programs > OneStream Software > Server Configuration Utility**.
 - b. Right-click the utility and select **Run as Administrator**.
 - c. Select **File > Open ASP.NET Configuration File** and browse to the appropriate location.
 - **On web servers:** C:\Program Files\OneStream Software\OneStream WebRoot\OneStreamWeb and select **appsettings.json**.
 - **On application servers:** C:\Program Files\OneStreamSoftware\OneStreamAppRoot\OneStreamApp and select **appsettings.json**.

Before Upgrading

- d. The file opens and displays the path to the **XFAppServerConfig.xml** and **XFWebServerConfig.xml** configuration files.



- e. Copy and paste the path to the configuration file. You will specify this location during the upgrade.

NOTE: This path is commonly set to **C:\OneStreamShare\Config**

4. For a backup, copy these configuration files.
5. Close the file without saving and exit the utility.
6. Verify the OneStream service account in Internet Information Services Manager:
 - a. The service account must be an Admin ID or in the IIS_IUSRS Group, Performance Log User and Performance Monitor Users group. The ID is required for queuing and CPU monitoring.
 - b. On each OneStream server, select **Start > Control Panel > Administrative Tools > Internet Information Services (IIS) Manage**.
 - c. Expand the server and select **Application Pools**. This displays application pools to the right. The OneStreamAppAppPool and OneStreamWebAppPool service accounts display in the Identity column. Note the Windows account and password as you will enter them in IIS after the upgrade.
7. Verify the availability of the OneStream Application Server where:

Before Upgrading

- The OneStream Database Configuration Utility is installed: On each OneStream application server, click **Start > Programs > OneStream Software** and verify that the OneStream Database Configuration Utility is installed.
- OneStream is installed: On each OneStream application server, **Start > Programs > OneStream Software** to verify that OneStream is installed.

8. Install the following :

- **App Server and Web Servers**

- Install the latest version of [ASP.NET Runtime \(Hosting Bundle\)](#) (minimum v6.0.14).
- Install the latest version of [.NET Desktop Runtime \(x64\)](#) (minimum v6.0.14).


- **Client**

- Install the latest version of [.NET Desktop Runtime \(x64\)](#) (minimum v6.0.14).

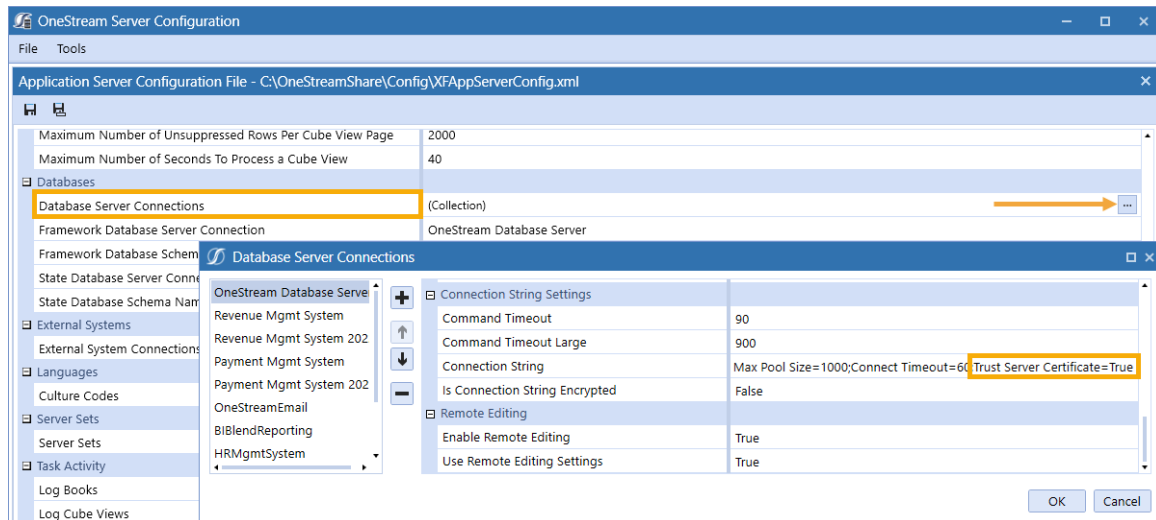
9. On-prem customers must enable the **Trust Server Certificate** for the following:

OneStream Database Server

From the OneStream Server Configuration Utility:

- a. Locate **Database Server Connections**.
- b. Click  to open the Database Server Connections.
- c. Add "Trust Server Certificate=True" to the end of the **Connection String**.
- d. Click **OK**.

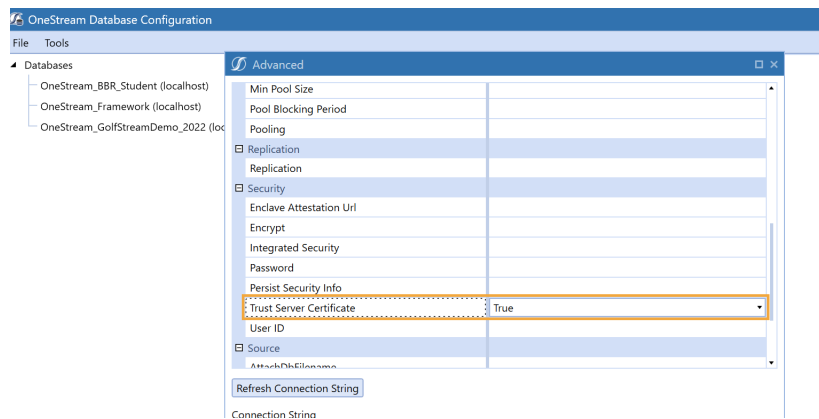
Before Upgrading



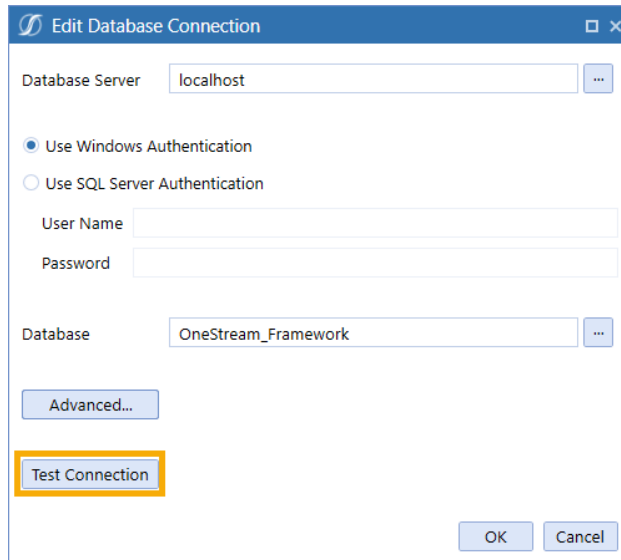
All Application Databases

From the OneStream Database Configuration Utility:

- Right-click on a database, click **Edit the Database Configuration**.
- Select **Advanced**.
- Set **Trust Server Certificate** to **True**, then click **OK**.



- d. Select **Test Connection** to ensure a successful connection.



The screenshot shows the 'Edit Database Connection' dialog box. It has a title bar with a logo and window controls. The 'Database Server' field contains 'localhost'. Below it, 'Use Windows Authentication' is selected with a radio button, and 'Use SQL Server Authentication' is unselected. There are empty text boxes for 'User Name' and 'Password'. The 'Database' field contains 'OneStream_Framework'. An 'Advanced...' button is below the database field. The 'Test Connection' button is highlighted with an orange border. At the bottom right are 'OK' and 'Cancel' buttons.

NOTE: Alternatively, set the Trust Server Certificate to True directly in the XML.

```
!3;Max Pool Size=1000;Connect Timeout=60;TrustServerCertificate=True]]></ConnectionString>
```

Repeat these steps for all Application Databases.

Upgrade System Components

Perform the tasks in the following sections - in order, to upgrade the complete OneStream system.

Uninstall OneStream Servers

1. Select **Control Panel > Programs and Features > Uninstall a Program** and locate the OneStream Servers component.
2. Right-click **OneStream Servers** and select **Uninstall**.

Uninstall OneStream Client API

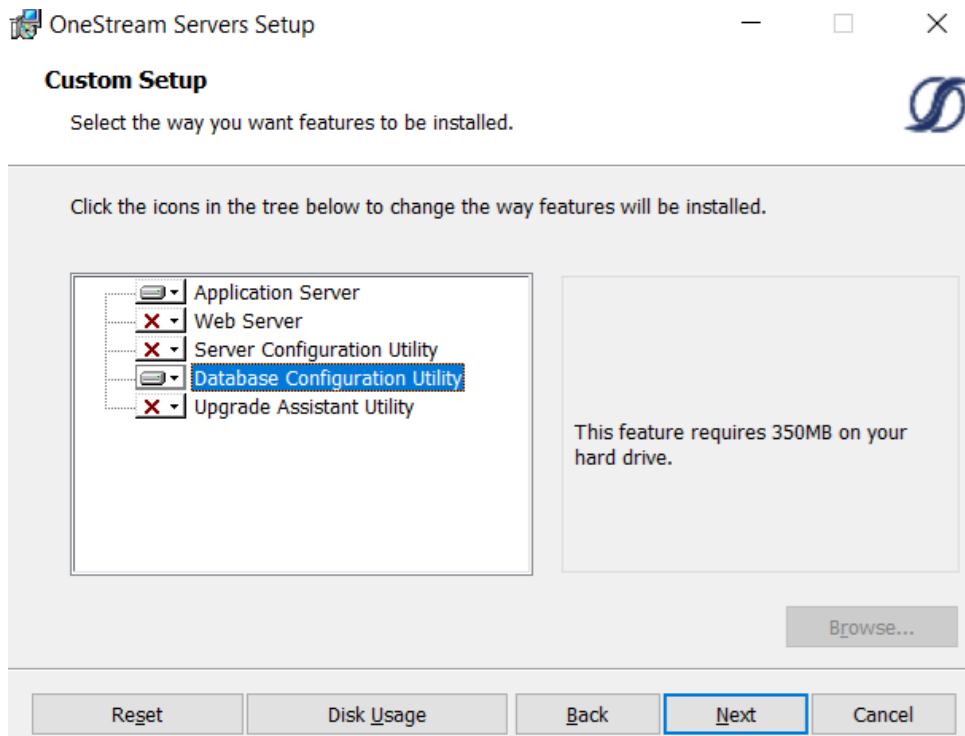
1. Select **Control Panel > Programs and Features > Uninstall a Program** and locate the OneStream Client API component.
2. Right-click **OneStream Client API** and select **Uninstall**.

Re-Install OneStream Servers on an Application Server

This is the primary installation package that performs a complete server setup, including the web server, application server and all utilities. You can perform a custom install to choose the appropriate server components.

1. Browse to the OneStream Servers package, right-click **OneStreamServers-#.msi** and select **Install** to run the server installation.
2. Click **Next** on the landing page and accept the License Agreement.
3. Specify the directory where the software was previously installed and click **Next**.
4. Select **Custom** and click **Next**.
5. On **Select Features**, choose **Application Server** and **Server Configuration Utility** and click **Next**.

NOTE: Choose the Database Configuration Utility and Upgrade Assistant Utility if the application server is the server where the Database Configuration Utility was previously installed.

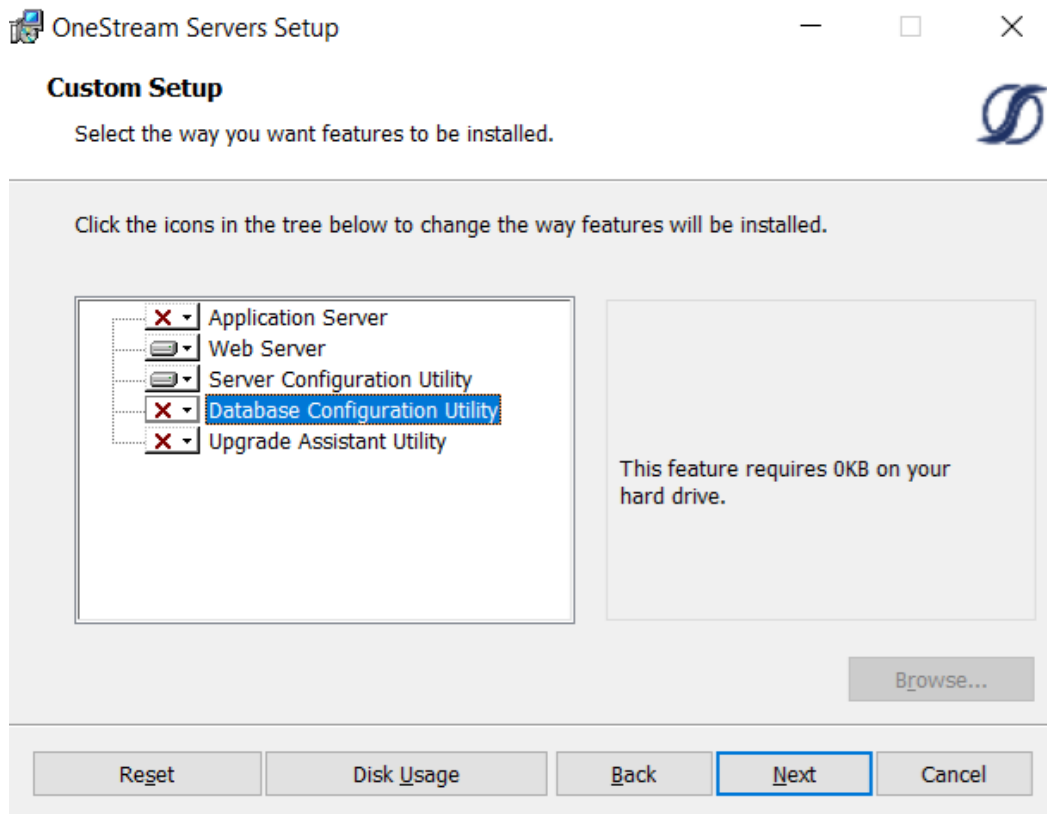


6. Click **Install** then **Finish**.

Re-Install OneStream Servers on a Web Server

1. Browse to the OneStream Servers package, right-click **OneStreamServers-#.msi** and select **Install**.
2. Click **Next** and accept the **License Agreement**.
3. Specify the directory where the software was previously installed and click **Next**.
4. Select **Custom** and click **Next**.
5. On **Select Features**, choose **Web Server** and **Server Configuration Utility** and click **Next**.

Upgrade System Components



6. Click **Install** then **Finish**.

Re-Install OneStream for Desktop

1. Browse to the OneStream package, right-click **OneStreamDesktop-#.msi** and select **Install**.
2. Click **Next** and accept the License Agreement.
3. Select **Custom** and click **Next**.
4. Select the directory where the software was previously installed and click **Next**.
5. On **Select Features**, select all options and click **Next**.
6. Click **Install** then **Finish**.

Upgrade the Framework and Application Databases

Before performing these steps, have a database administrator back up all OneStream databases.

1. On the OneStream application server with the OneStream Database Configuration Utility installed, select **Start > Programs > OneStream Software > OneStream Database Configuration Utility**.
2. Right-click the utility and select **Run as Administrator**.
3. Right-click **OneStream Framework Database** and choose **Upgrade Database Version**.

NOTE: If this is disabled, an upgrade is not required.

NOTE: If you get an error, check the log for details: C:\Program Files\OneStream Software\XFDatabaseConfig\Log

4. Confirm the upgrade.
5. Repeat the upgrade for each **Application database** and the **Framework database** until the option is disabled. This will indicate you have updated to the current version.

Run the Upgrade Assistant Utility

Guidance for self-hosted environments

This is an additional step for when upgrading to Platform Release 8.0 or later and must be performed. Specifically, this version of the Upgrade Assistant Utility will convert any legacy reports that were stored in CodeDOM format to now be stored as XML.

1. On the OneStream application server with the OneStream Upgrade Assistant Utility installed, select **Start > Programs > OneStream Software > OneStream Upgrade Assistant Utility**.
2. From the command line enter:

```
xfupgradeassistant -c C:\OneStreamShare\Config\XFAppServerConfig.xml -t ReportLayoutBytes -v -update
```

NOTE: C:\OneStreamShare\Config is the default path to the configuration file. You must update this path if it has been modified for your environment.

3. Enter exit to close the utility.
4. Restart IIS.

Update the ASP.NET Configuration File

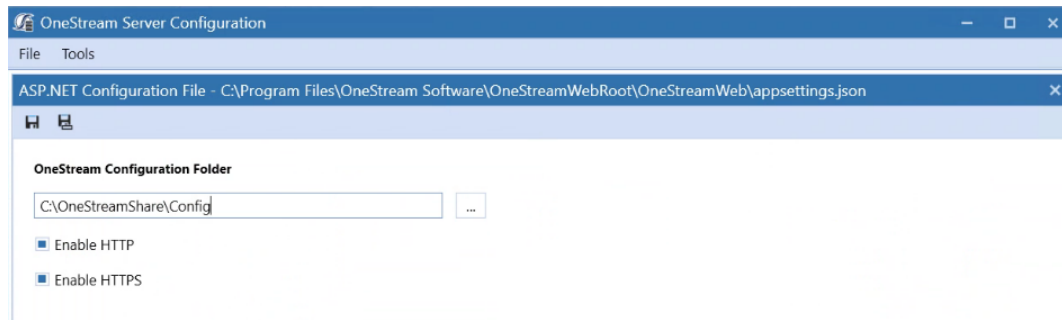
The ASP.NET Configuration file (**appsettings.json**) must be updated on every server / folder as outlined below:

- Application server
 - C:\Program Files\OneStream
Software\OneStreamAppRoot\OneStreamApp\appsettings.json
 - Web servers:
 - C:\Program Files\OneStream
Software\OneStreamWebRoot\OneStreamWeb\appsettings.json
 - C:\Program Files\OneStream
Software\OneStreamWebApiRoot\OneStreamWebApi\appsettings.json
1. On each OneStream server, launch the OneStream Server Configuration Utility by clicking **Start > Programs > OneStream Software > Server Configuration Utility**.
 2. Right-click the utility and select **Run as Administrator**.
 3. Choose **File > Open ASP.NET Configuration File** and browse to the appropriate location from the folders above.
 4. Select the **appsettings.json** file.
 5. When the file opens, copy the directory path of the configuration files.

NOTE: This path is commonly set to C:\OneStreamShare\Config

6. **Enable HTTP** and **Enable HTTPS** are enabled by default. **Change** when applicable.

Upgrade System Components



NOTE: Clear **Enable HTTP** when SSL is enabled or clear **Enable HTTPS** when SSL is not enabled.

7. Save and close the file.
8. Repeat these steps on each web and app server in the environment.

Update the Configuration Files

1. Open the Application Server Configuration file and select **File > Save**.
2. Close and re-open the same file.
3. In **Database Server Connections**, select the ellipsis and update the command time-outs for the OneStream Database Server connection:
Short = 90 *must do
Large = 900 (minimum or 900)
4. Select **File > Save** and close the file.
5. Open the **Web Server Configuration** file.
6. Select **File > Save** and close the file.

Update and Configure IIS

1. On each OneStream server, open the OneStream Server Configuration Utility by clicking **Start > Programs > OneStream Software > Server Configuration Utility**.
2. Right-click the utility and select **Run as Administrator**.

3. Choose **Tools > Configure IIS**.
4. In **Configure IIS**, specify the following:
 - a. For Web Site Name, enter the name of the OneStream IIS Website to update.
 - b. The OneStream App Server, and Web Server sites.
5. Select **Update IIS Default Settings**.
6. Select options to update IIS for the appropriate websites:
 - a. **Use Web Server Settings**: Specify the Web Server site.
 - b. **Use App Server Settings**: Specify the App Server site.
 - c. **User Account Type**: Specify **Custom Account**, then enter the user name and password of the OneStream Service account.
7. Click **Update IIS Settings** then **OK**.
8. Repeat these steps to set the appropriate IIS settings for the application pools in IIS.
9. Click **Reset IIS**.

Test the Windows Client Login Using ClickOnce

1. Using the Microsoft Edge Web Browser, navigate to the OneStream Windows App URL:
 - **On Prem**: http://<webserver>:50001/OneStreamWeb
 - **Cloud**: https://<customer>.onestreamcloud.com/OneStreamWeb
2. Click **Open** to launch the ClickOnce Windows app.
3. Confirm that you can log in.
4. From **Application**, select **System Administration** then click **Connect**.
5. Select **System > Tools > Environment** to identify the application servers and their status.
6. Verify that each server is active.

Verify the Application

1. Compile all business rules, ensure to:
 - Right-click the grid and export any errors for analysis using an Excel file format.
 - Apply updates as needed.
2. Download and import the Standard Application and Standard System Reports from the MarketPlace portal on the [Solution Exchange](#).

Platform Release 8.0 or Later Readiness

Upgrading your OneStream Platform to Release 8.0 or later requires .NET 6.

Business Rules

NOTE: Users upgrading from Platform Release 8.0 to 8.1 are not expected to require Business Rule maintenance.

Users upgrading from a Platform Release prior to 8.0 will require Business Rule maintenance as Platform Release 8.0 includes updates and enhancements to the Business Rules compiler to improve syntax detection. Administrators must resolve these errors to compile business rules fully. Warning messages identify line items that will function, but you should update them to support the latest compiler's requirements. Resolving these warnings varies. You may be able to use a provided replacement function or change a function's properties.

System.Data.SqlClient to Microsoft.Data.SqlClient Migration

IMPORTANT:

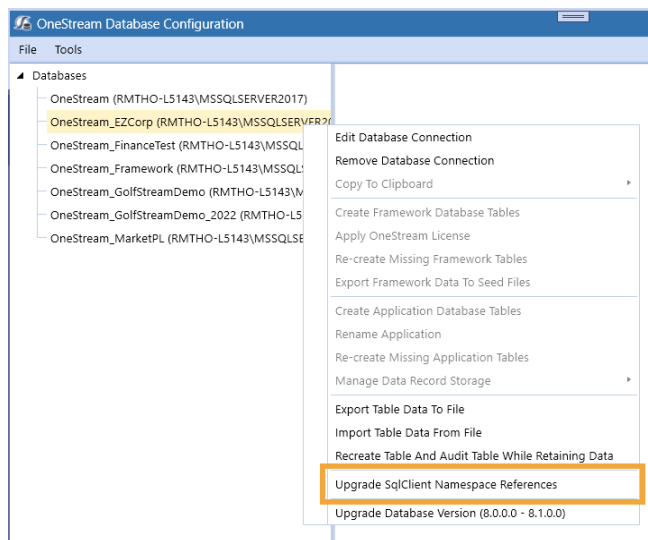
In order to maintain consistency with Microsoft's recommendations, in Platform Release 8.1, the data access driver for SQL Server will be updated from System.Data.SqlClient to Microsoft.Data.SqlClient. This migration will be automatic and will take place during the database upgrade process. All references to System.Data.SqlClient will automatically be upgraded to Microsoft.Data.SqlClient in Business Rules, Member Formulas, and the like.

NOTE:

These updates will take place automatically during the database upgrade to Platform Release 8.1, and when using the Load function of **Application Load/Extract**, instances of System.Data.SqlClient will automatically convert to Microsoft.Data.SqlClient.

IMPORTANT:

If an application was migrated after the Platform Release 8.1 upgrade from Application Copy (Cloud Administration Tools (CAT)) or a database BACPAC file, then the migration from System.Data.SqlClient to Microsoft.Data.SqlClient will need to be applied directly to that application. On-prem customers can run the Upgrade SqlClient Namespace References from the OneStream Database Configuration utility to replace System.Data.SqlClient references. SaaS customer can request to have this run by contacting OneStream Support (support.onestreamsoftware.com).



For more information, visit the [Platform v8+ Upgrades](#) page on ONECommunity.

Example

Business Rule Updates: Update Using and Import statements to reference Microsoft.Data.SqlClient using the following code:

C# Prior to 8.1

```
using System.Data.SqlClient;
...
SqlConnection conn1 = new System.Data.SqlClient.SqlConnection();
System.Data.SqlClient.SqlConnection conn2 = (System.Data.SqlClient.SqlConnection)conn1;
```

C# For 8.1

```
using Microsoft.Data.SqlClient;
```

```
...  
SqlConnection conn1 = new Microsoft.Data.SqlClient.SqlConnection();  
SqlConnection conn2 = (Microsoft.Data.SqlClient.SqlConnection)conn1;
```

Visual Basic Prior to 8.1

```
Imports System.Data.SqlClient  
...  
Dim conn1 As New System.Data.SqlClient.SqlConnection()  
Dim conn2 As System.Data.SqlClient.SqlConnection = CType(conn1, System.Data.SqlClient.SqlConnection)
```

Visual Basic for 8.1

```
Imports Microsoft.Data.SqlClient  
...  
Dim conn1 As New Microsoft.Data.SqlClient.SqlConnection()  
Dim conn2 As SqlConnection = CType(conn1, Microsoft.Data.SqlClient.SqlConnection)
```

Custom DLLs

If your implementation / business rules reference any custom DLLs that are not provided by OneStream, these DLLs must be .NET 6 compatible. Contact OneStream Support (support.onestreamsoftware.com) to discuss available upgrade options.

ERPConnect (SAP)

ERPConnect45.dll enabling connection to SAP systems is no longer available in Platform 8.0 and later. A newer version ERPConnectStandard20.dll is available through the download "DLL Packages" from the Platform page of the [Solution Exchange](#).

On-Prem Customers:

1. Download ERPConnectStandard20.dll file to your integrations folder.
2. Install the required [Visual C++ 2013 Runtime](#).
3. Download and copy SAP NetWeaver RFC Library DLL (sapnwrfc.dll) to the integrations folder.

See [Theobald Software ERPConnect](#) Requirements for more information.

4. Modify your business rules to use the ERPConnectStandard20.dll.

Cloud/SaaS Customers: ERPConnect is available through the Smart Integration Connector (SIC). See ERPConnect section of the SIC Guide for installation details or contact OneStream Support (support.onestreamsoftware.com) to discuss more upgrade options.

Smart Integration Connector

[Smart Integration Connector](#) is required for OneStream Cloud integration with local customer data sources when using OneStream Platform Release 8.0 or higher. VPN is no longer supported with Platform Release 8.0 or higher and will reach end of service for Platform versions prior to version 8 on August 31, 2024.

Authentication

Cloud Customers: [OneStream IdentityServer](#) is required for OneStream Platform Release 8.0 or later.

Self-hosted Customers: No changes necessary. Legacy Authentication support is the standard for self-hosted customers.

.NET 6 Desktop Runtime and ASP.NET Runtime

To best align with Microsoft's long-term support strategy, OneStream Platform Release 8.0 or later is built using .NET 6. Platform Release 8.0 or later users are required to use the latest versions of [.NET Desktop Runtime x64](#) and [ASP .NET Core Runtime Hosting Bundle \(6.0.14 minimum\)](#).

VBA Changes

ProcessSSOAuthenticationAndCreateToken is no longer supported as an authentication option from VBA scripts. See [Visual Basic for Applications \(VBA\) Procedures](#) for additional details. See Visual Basic for Applications (VBA) Procedures in the Design and Reference Guide for additional details.

Client API Changes

Client API is no longer provided with Platform Release 8.0 or higher. OneStream recommends Task Scheduler or the REST API to replace existing Client API use cases.

Tiles Page

The ClickOnce journey is enhanced to launch the application with a single click of the **Open** button while eliminating the tiles page. For more information, see [Installation Using ClickOnce](#) in the Installation and Configuration Guide. For more information, see Installation Using ClickOnce in the Installation and Configuration Guide.

Help Documentation

Help documentation has moved from within the application to <https://documentation.onestream.com>. Clicking the in-app help icon routes you to this site.

Business Rule Groups

In version 8.0 the default for new Business Rule Access or Maintenance Groups is the Administrators group. This default can be changed by the Server Configuration Utility.

MarketPlace Solution Compatibility

The following MarketPlace Solutions are compatible with OneStream Platform version 8.1.

MarketPlace Solution	Version
Account Reconciliations	PV800 SV200
Administrator Solution Tools	PV620 SV101
Application Control Manager	PV740 SV100 (Future Release)
Capital Planning	PV620 SV102
Cash Planning	PV620 SV102
Cloud Administration Tools	PV600 SV101 (Future Release)
Contract Compliance	PV620 SV102
Data Entry 123	PV440 SV100

MarketPlace Solution	Version
Dimension Comparison	PV600 SV100
Excel Add-in Installer	PV710 SV100
File Explorer Manager	PV650 SV102
Financial Close	PV710 SV201
Guided Reporting	PV600 SV102
Help Desk	PV640 SV100
Marketplace Solution Tools	PV720 SV100
Metadata Builder	PV520 SV101
Model Maker	PV680 SV201
Parcel Service	PV630 SV100
People Planning	PV620 SV103
Predictive Analytics 123	PV620 SV102 (Future Release)
Process Blocker	PV430 SV100
Process Control Manager	PV430 SV101
Provision Request Manager	PV440 SV104
Reporting Compliance	PV620 SV103
Sales Planning	PV620 SV102

MarketPlace Solution	Version
Sample Templates	PV600 SV100
Scenario Analysis 123	PV530 SV100
Security Audit Reports	PV620 SV101
Snippet Editor	PV620 SV100
Standard Application Reports	PV610 SV201
Standard Cube View Styles	PV410 SV100
Standard System Reports	PV430 SV102
System Diagnostics	PV620 SV202
Table Data Manager	PV620 SV100
Task Manager	PV660 SV102
Tax Provision	PV620 SV200
Thing Compliance	PV620 SV102
Thing Planning	PV620 SV101
Train Me	PV410 SV100
Transaction Matching	PV800 SV200
XML Security Remover	PV410 SV100

Help and Miscellaneous

Upgrade Troubleshooting

Incorrect Installation Order

To check that you have the latest .NET versions installed, run the following command in the PowerShell:

```
dotnet --info
```

NOTE: The hosting bundle should be Microsoft.AspNetCore.App 6.0.x and the desktop runtime should be Microsoft.WindowsDesktop.App 6.0.x

To check that you IIS was properly installed, run the following command in the PowerShell:

```
get-webglobalmodule
```

NOTE: The output must contain AspNetCoreModuleV2.

Resolution: Uninstall the hosting bundle and ensure that IIS is properly installed.

Execution Policy when running PowerShell Script

Resolution: Run the following commands in the PowerShell:

- PS C:\WINDOWS\system32> Set-ExecutionPolicy Unrestricted
- PS C:\WINDOWS\system32> Set-ExecutionPolicy

Internet Explorer End-of-Use

When using ClickOnce, it must be invoked using Microsoft Edge. For more information, see [ClickOnce](#) in the Installation and Configuration Guide.

More details for IE end-of-use details are as follows:

As of July 2022, if you have an Internet Explorer ClickOnce shortcut to the OneStream Desktop Client application, it will not launch the application of any version when IE is disabled inside your organization. Starting with 7.0, newly created shortcuts will be created using Windows PresentationHost.exe. Upgrading to 7.0 will not automatically update existing shortcuts. You must manually create new ones or edit existing ones. To update an existing shortcut of any OneStream platform version, follow these steps:

1. Right-click on the existing desktop shortcut and go to Properties.
2. Copy and paste the text in the Target field into the notepad.
3. Replace this section "C:\Program Files\Internet Explorer\iexplore.exe" with C:\Windows\System32\PresentationHost.exe-launchApplication (note that the " " are removed).
4. Copy and paste the whole text into the target field inside the shortcut's properties, click Apply, then click OK.

You will not be able to view embedded external web pages inside OneStream when IE is disabled inside your organization. Starting with 7.0, the external web pages will be embedded using the Microsoft Edge WebView2 runtime control. Microsoft automatically installs the WebView2 runtime on Windows 10 machines. You can verify if the component is installed on your machine through Add or Remove Programs. It can also be downloaded directly from Microsoft.

Once IE is disabled within your organization, embedded web pages will no longer render inside OneStream on versions 6.8 and older, even if you have WebView2 installed. If your application uses features that embed external web pages, usually through properties that allow pointing to a URL, an upgrade to 7.0+ will be required with the WebView2 runtime control. Key OneStream features that enable embedding external web pages:

- Dashboard component Web Content
- Dashboard component File Viewer
- Dashboard component Button
- A drill back Business Rule in Transformation Rules Connector