



Client Options and Installation Guide

7.0.1

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OneStream Client Options and Installation

Introduction

The purpose of this document is to provide an overview of OneStream's client options and any required installation process, while giving guidance in choosing the proper software configuration and requirements for deployment. The anticipated audience is Information Technology professionals responsible for installing, maintaining and supporting the OneStream Platform.

All related documentation can be found on MarketPlace.

Client Options

OneStream Web App for Windows

The recommended end user interface is the OneStream Web App for Windows. OneStream Windows App provides a Spreadsheet feature with the potential to eliminate the need for an Excel Add-in which requires administrative rights to install on a user's desktop. It uses all firewall-friendly communications to OneStream web servers using Microsoft Windows Communication Foundation (WCF). All client to server connectivity is based on SOAP and REST web services over HTTP/HTTPS. This is safely deployed with a signed SSL certificate. Microsoft ClickOnce technology is provided for true web-based deployment ease and is supported on all versions of Windows which are currently under mainstream support by Microsoft.

OneStream Excel Add-in

The OneStream Excel Add-In client should be installed for any user that will need the ability to perform Excel-based analysis on OneStream financial model data. The Excel Add-In is an Excel COM add-in that securely connects to the servers through the OneStream web services.

OneStream Mobile

OneStream offers a mobile user interface alternative (HTML5-based) via a separate URL accessible by most desktop web browsers and mobile browsers. It is primarily used for data analysis consumption of rich reporting content and monitoring capabilities for administrators. No native mobile app is required.

Display Settings

OneStream and MarketPlace solutions frequently require the display of multiple data elements for proper data entry and analysis. Therefore, the recommended screen resolution is a minimum of 1920 x 1080 for optimal rendering of forms and reports.

Additionally, OneStream recommends that you adjust the Windows System Display text setting to 100% and do not apply any Custom Scaling options.

Hardware and Software Requirements

Below is a list of the hardware and software requirements for the client workstation.

Client Workstation Recommendations	
Supported Operating Systems	<ul style="list-style-type: none">• Windows 8• Windows 10
Web Browser	<ul style="list-style-type: none">• Either Internet Explorer 11 or Edge browser required for interaction with OneStream Web App for Windows <div>NOTE: If using a shortcut created for the desktop, Internet Explorer 11 must be installed on the machine. All shortcuts are launched using Internet Explorer.</div>
Recommended Hardware	<ul style="list-style-type: none">• Exceed the minimum requirements for Operating System and browser• 64-bit Architecture• 8 GB RAM or higher
Required Software	<ul style="list-style-type: none">• Either Internet Explorer 11 or Edge browser required for interaction with OneStream Web App for Windows• Microsoft Office 2010 64-bit version or above (for optional Excel Add-in)• Microsoft .NET Framework 4.7
Recommended Software	<ul style="list-style-type: none">• 64-bit Windows OS• 64-bit Microsoft Office Excel version 2010 or higher (for optional Excel Add-in)

Installation Packages Overview

OneStream is deployed using separate installation packages. One of these packages contains the client installation material. The remaining packages contain.



Installation Package Checklist

The checklist below details the installation packages and provides an overview of their contents. Each OneStream system component will be described in greater depth in a later section. All software can be downloaded from MarketPlace.

OneStream Client Installation Package (Extracted from Full Download Package)

1. OneStream Web App for Windows - optional installation package as an alternative to ClickOnce deployment
2. OneStream Excel Add-In
3. OneStream Studio
4. Silent – Silent Installation (.iss) Files

OneStream Windows App Client Installation Package

OneStream Windows App (optional installation package as an alternative to ClickOnce deployment)

Installing Client Components

See [Hardware and Software Requirements](#) for requirements related to Client Workstations and versions supported of relevant Microsoft Office products.

Deploying OneStream Windows Web App for Windows via ClickOnce

The recommended deployment method for OneStream Windows App is ClickOnce. Microsoft ClickOnce technology is provided for true web-based deployment ease and is supported on all versions of Windows which are currently under mainstream support by Microsoft. This is a web-based link supplied by OneStream. ClickOnce is an integrated component of the Windows .NET Framework and it is a prerequisite to have the PC updated to OneStream's minimum version. See the System and Architecture Guide for the required version.

Deployments target a system-managed user-specific folder. No changes are made to C:\Program Files or registry settings and no running of scripts occurs. The deployment package that ClickOnce generates cannot be modified.

There is auto-updating software on the related application server, so if an upgrade has been detected, the OneStream App will be updated if deployed with ClickOnce.

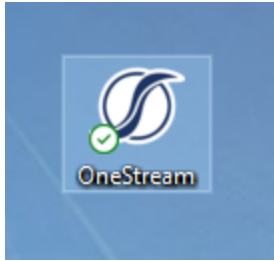
Web-based End User Deployment

Users simply go to a standard website deployed via OneStream (in either Microsoft Internet Explorer or Edge browsers), The URL would be similar to:

<https://<servername>.onestreamcloud.com/onestreamweb/onestreamxf.aspx>

After clicking a Run button from this page, the application will be downloaded (package size ~220 MB with ~325 files) and deployed in a trusted local user directory that does not require administrative rights (location controlled by Windows and .NET Framework and is located under C:/Users/<username>/AppData/Local/Apps/2.0/<Windows Assigned GUID>)

OneStream Web App for Windows is then launched with the URL of the launching server preconfigured for the user to make that connection. A shortcut icon can then be saved on the user's desktop.



Troubleshooting

ClickOnce does not work with Citrix. The workaround for this is a manual installation of a full executable. Users may need to contact their IT support or add OneStream's URL's as a trusted site in Cisco Umbrella, Z Scaler, or proxy.

Installing OneStream Web App for Windows

Though not the recommended deployment method, OneStream Windows App can also be deployed via a standard InstallShield-based installation program. This desktop installer version of OneStream Windows App enables users to connect to multiple OneStream servers from a single installation. The sign on screen for the installed version is different than other OneStream sign on screens. When using this method to install the program, a specific version of the software is being installed. When the software version of the OneStream servers is upgraded, applications installed using this method will not automatically be upgraded to the new version as would be the case with a ClickOnce deployment. A new executable file containing the latest version must be downloaded from MarketPlace and reinstalled.

Users can install multiple versions on the same PC as needed (for example, if connecting to multiple versions of OneStream). The target audience of this method includes consultants and other individuals who wish to interact with multiple versions of servers on the same or different machines.

File deployment of the OneStream Windows App payload in this case is similar, meaning no deployment of files is necessary to the C:\Program Files directory and no Windows Registry changes are made. Given the App was not deployed via ClickOnce in this instance, the user must enter the URL of the OneStream application server to connect and auto-updating of the App does not occur when this application server is updated. The convenience of OneStream-created silent installation and uninstallation packages is not provided initially in OneStream version 4.2.0 and higher.

NOTE: Silent Uninstall of the OneStream Windows Application Installer is not supported; (it is not available for the OneStream Windows App).

1. Obtain and download the executable file from MarketPlace.
2. Navigate to the location where the Setup.exe file was downloaded and double click the file to launch the InstallShield Wizard.
3. Follow the installation wizard prompts.
4. Accept the terms of the license agreement.
5. Select the appropriate setup type.
6. Click Install.

To launch the application, see [Launching OneStream Windows App](#) in the Design and Reference Guide.

Considerations for Excel Add-in

Some considerations when installing the OneStream Excel Add-in:

1. In order to properly install the Excel Add-in or Studio, changes are required to the Windows registry. Ensure that the user has rights to update their own registry while doing installations. Note that this limitation does not apply to the use of OneStream Windows App.
2. Changes made to the Windows registry for the Excel Add-in or Studio during the installation are made only for the user who is doing the installation. For example, if someone in Information Technology is logged into the user's machine to do the installation, the business user will not be able to access the Excel Add-in.
3. The registration process of the Excel Add-in or Studio requires certain Microsoft .NET Framework rights to execute a program stored in that folder. The folder is C:\Windows\Microsoft.NET\Framework (or Framework64 if the user is running the 64-bit version of Excel).
4. If the user had Excel 2003 or another prior version installed before Excel 2010 or greater was installed on the machine and subsequently uninstalled the older version of Excel, the newer version of Excel and the Excel Add-in will need to be completely uninstalled and reinstalled.

Other Office Add-ins may conflict with the Excel Add-in, so discuss other registered Add-ins when discussing installation issues with OneStream Support.

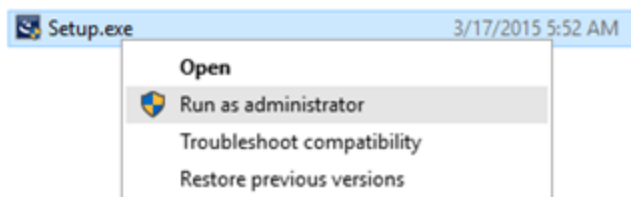
Installing the OneStream Excel Add-In Client Package

The Excel Add-In client should be installed for any user that will need the ability to perform Excel based analysis. The Excel Add-In is an Excel COM add-in that connects to the servers through the OneStream environment through OneStream web services. To install this client, follow the installation wizard prompts.

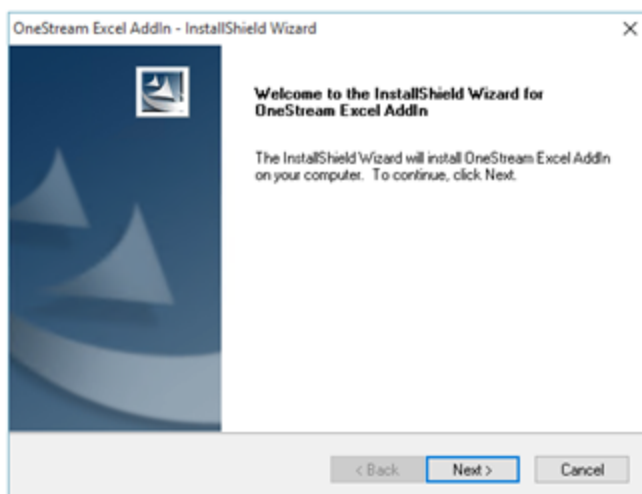
Installation Process

The initial installation of the Excel Add-In must be completed with Administrator privilege.

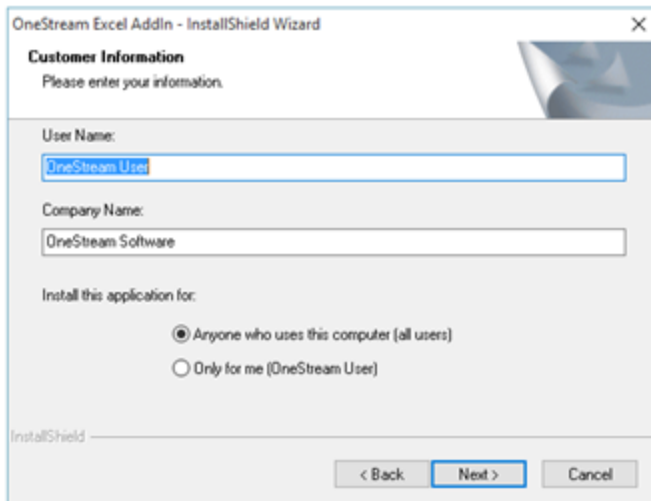
1. Launch the *Setup.exe*.



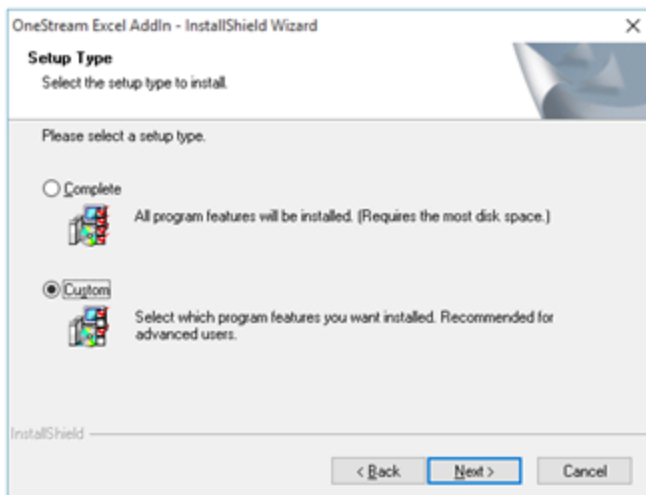
2. Select **Next** to begin the installation



-
3. Select **Next** to install the Excel Add-In for all users of workstation



4. Setup Type (Complete or Custom)



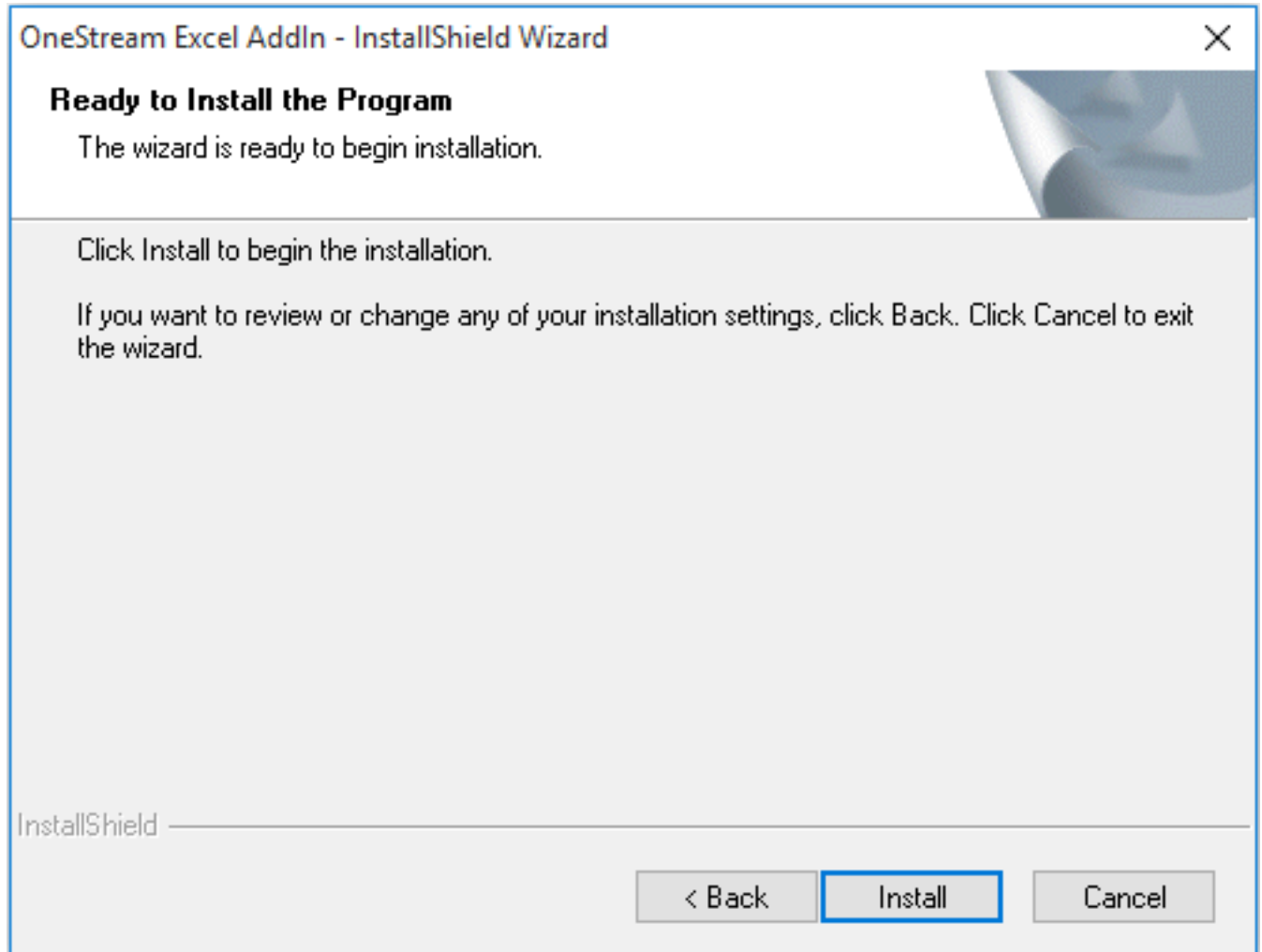
5. Complete Setup Type

Recommended for users who do have Administrator permission on the computer.

Selecting Complete does the following:

-
- Install to the default directory: *C:\Program Files (x86)\OneStream Software*
 - Install the following: OneStream Excel Add-In

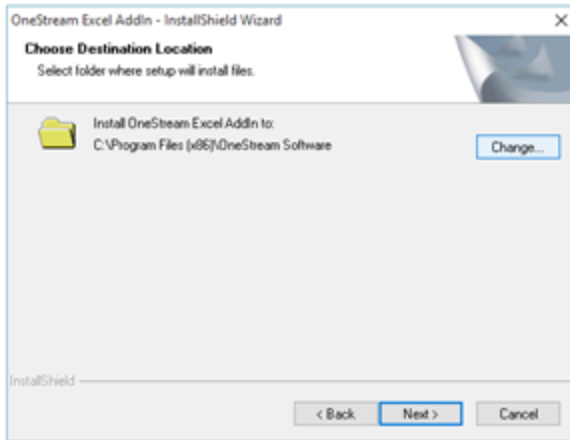
NOTE: The Complete installation installs the Excel Add-In files by default to the Program Files directory, which requires Administrator level permission.



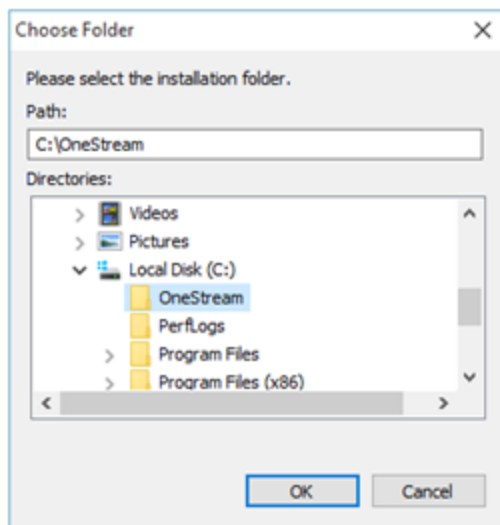
Custom Setup Type

Recommended for users who do not have Administrator permission on the computer.

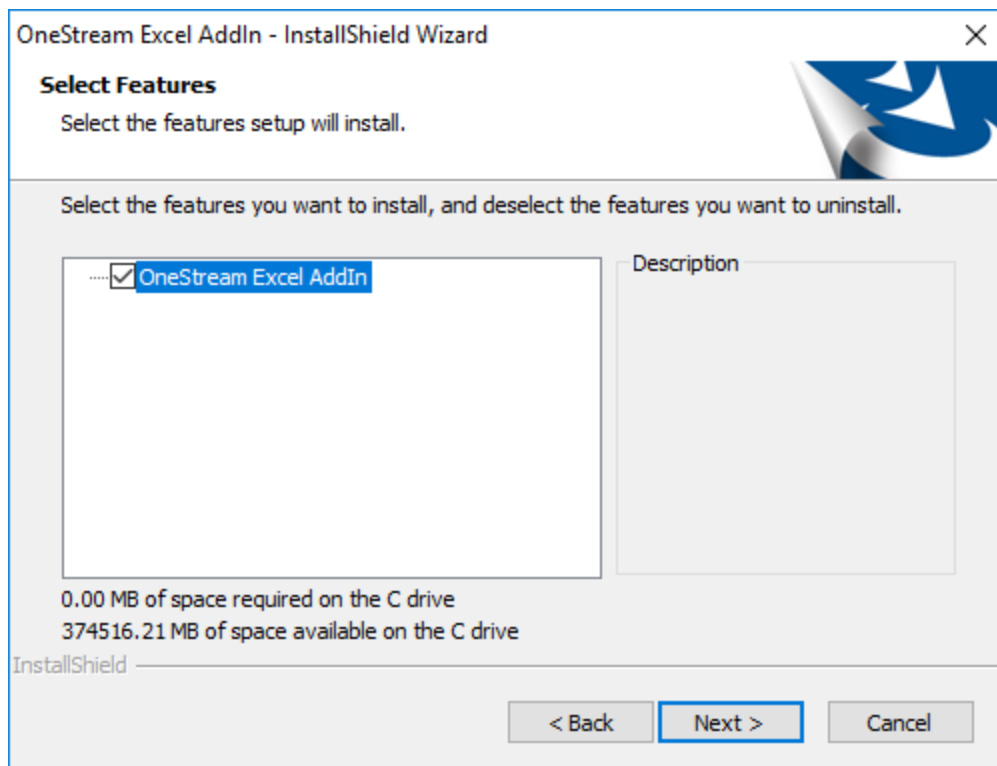
-
1. Select the **Custom** install type to edit the default installation directory.



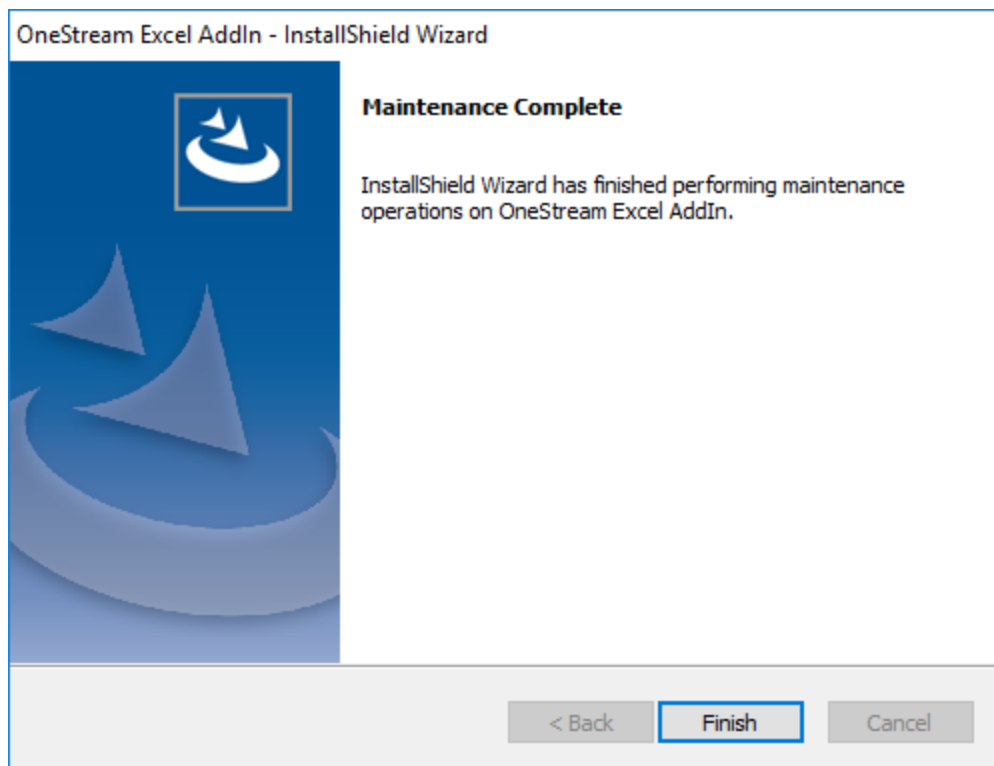
2. Change the default directory to a directory other than Program Files, for example *C:\OneStream*.



3. Click OneStream Excel AddIn and then click **Next**.



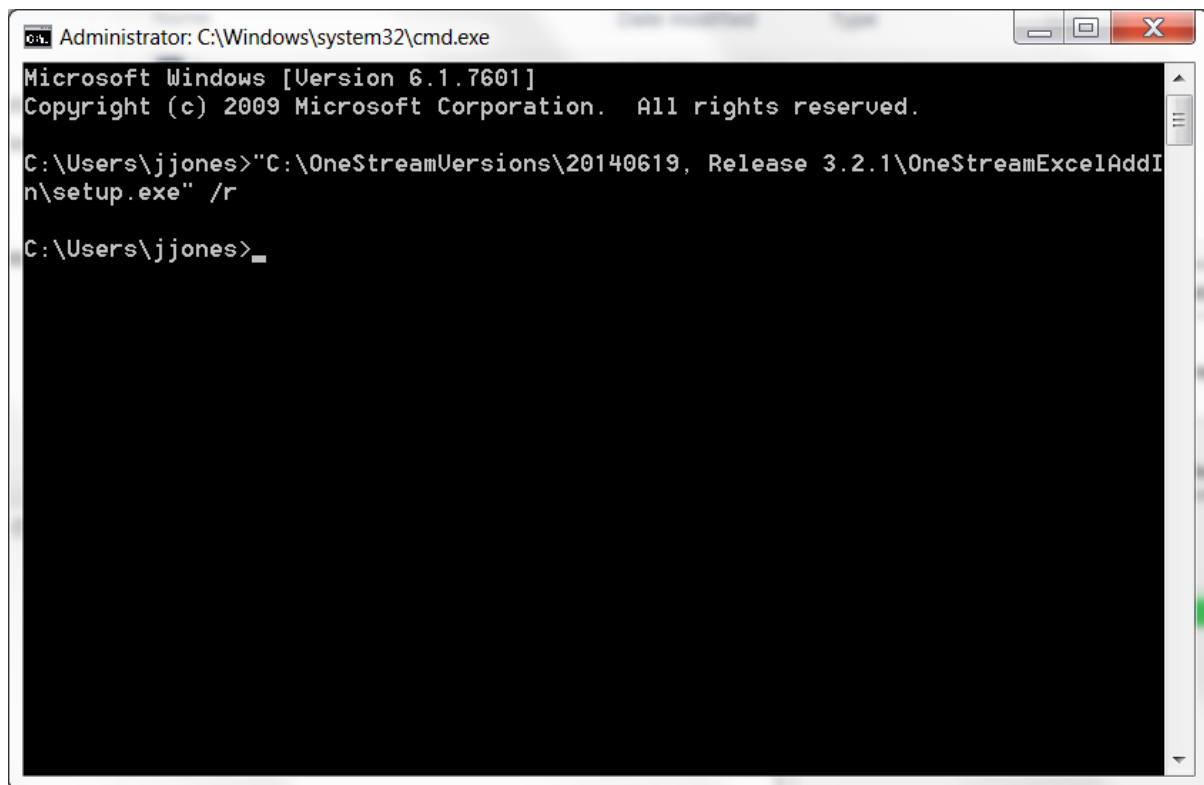
4. Accept the current settings and perform the installation.



Excel Add-In Silent Installation

To prepare an OneStream installation program to run silently, the OneStream installation program first needs to run using the '/r' option to record the user's selections. For example, '*Excel.Install.iss*' is the result of recording the default selections when installing the OneStream Excel Add-In. Similarly, '*Excel.Uninstall.iss*' is the result of recording the default selections when uninstalling the OneStream Excel Add-In (for example, when running the installation program a second time to remove the add-in).

To create a silent installation using options other than the default selections, execute the installation program using 'Setup.exe /r' and then retrieve the resulting Setup.iss file from the Windows folder.

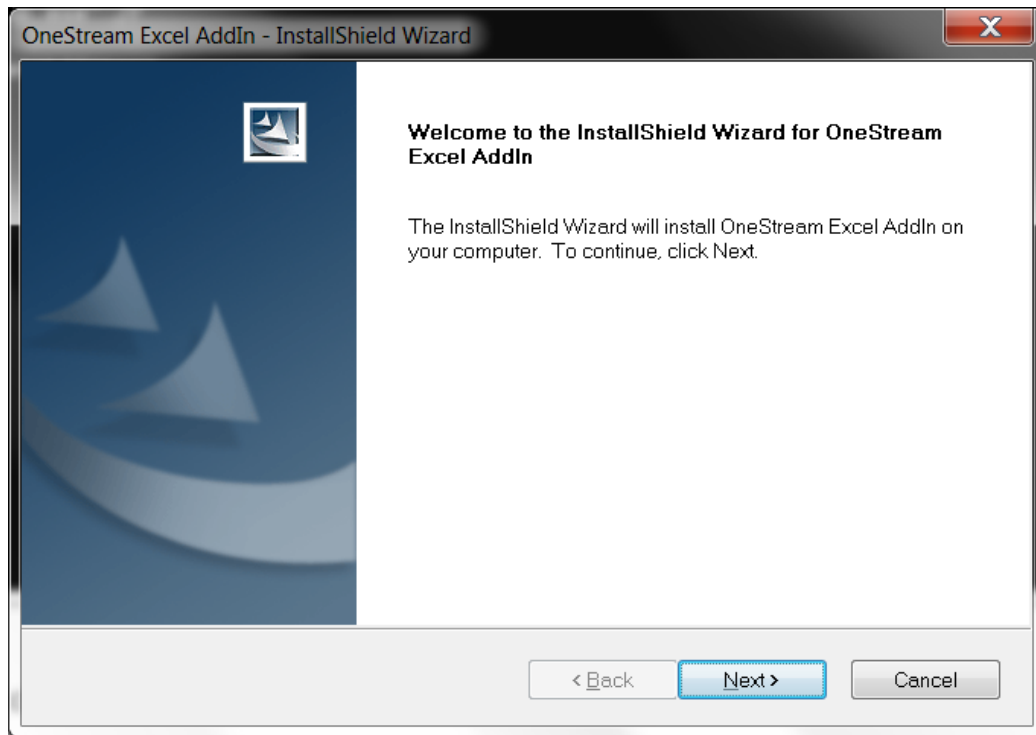


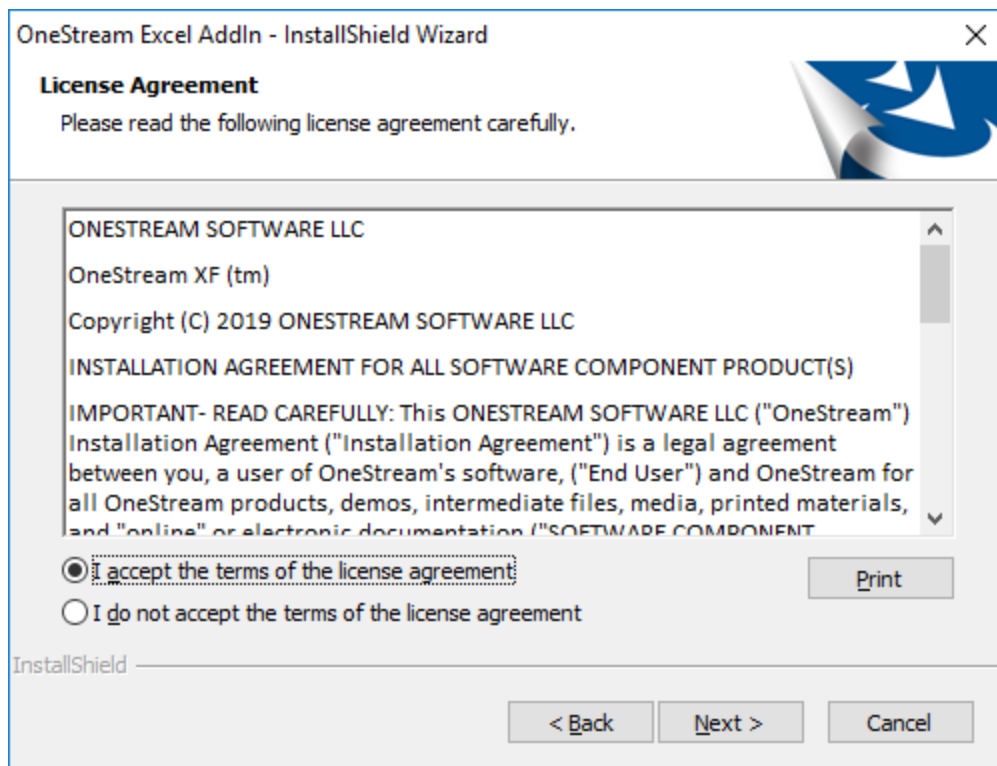
```
Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\jjones>"C:\OneStreamVersions\20140619, Release 3.2.1\OneStreamExcelAddI
n\setup.exe" /r

C:\Users\jjones>_
```

-
1. Select the installation options to be recorded to the .iss file which will be generated:





OneStream Excel AddIn - InstallShield Wizard

Customer Information
Please enter your information.

User Name:
OneStream User

Company Name:
OneStream Software

Install this application for:

☒ Anyone who uses this computer (all users)

☐ Only for me (OneStream User)

InstallShield

< Back Next > Cancel

OneStream Excel AddIn - InstallShield Wizard

Setup Type
Select the setup type to install.

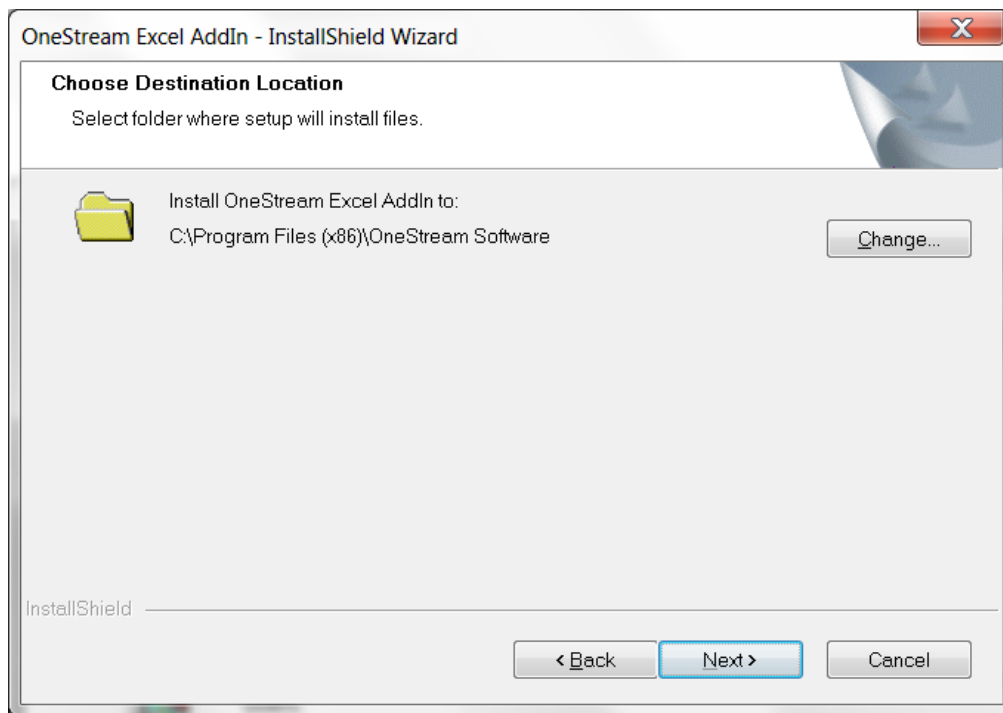
Please select a setup type.

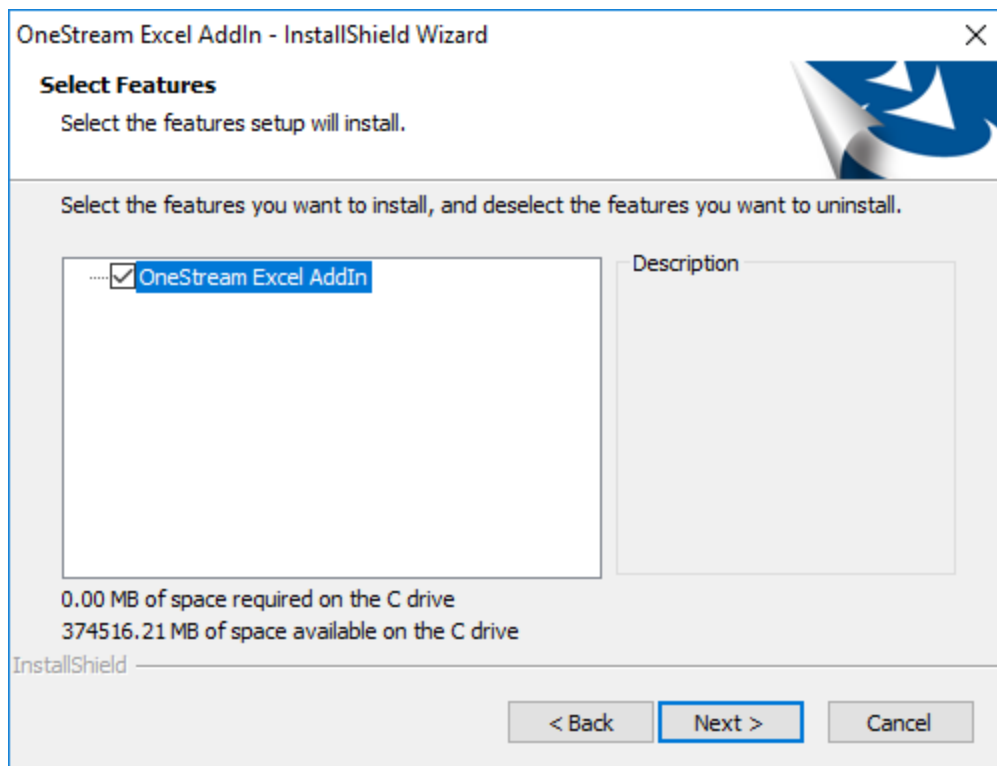
☐ Complete
All program features will be installed. (Requires the most disk space.)

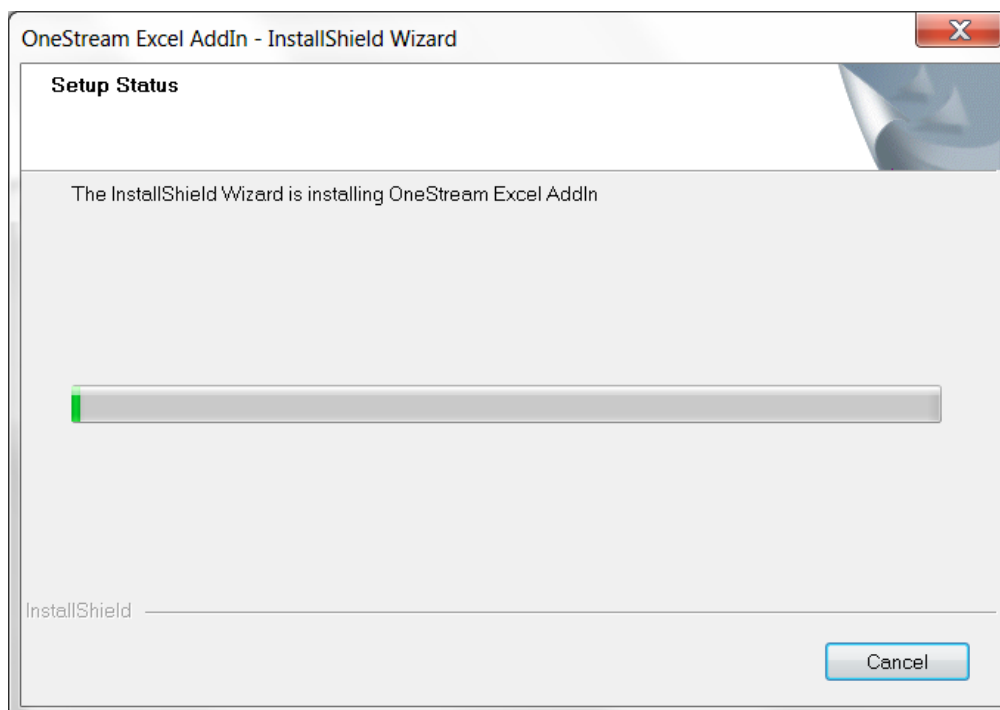
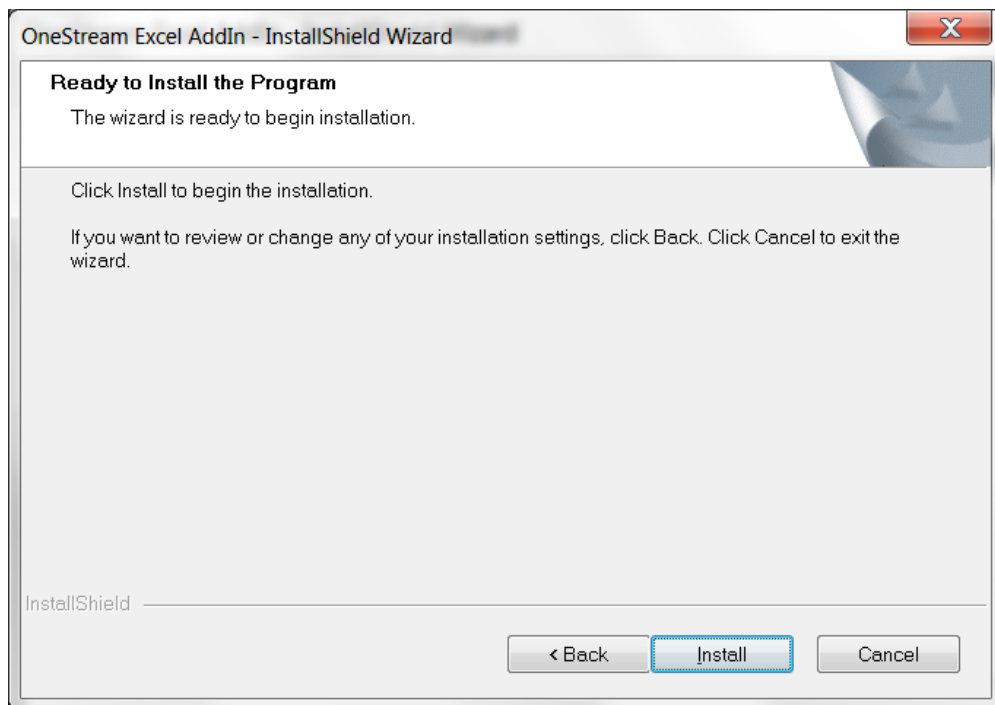
☒ Custom
Select which program features you want installed. Recommended for advanced users.

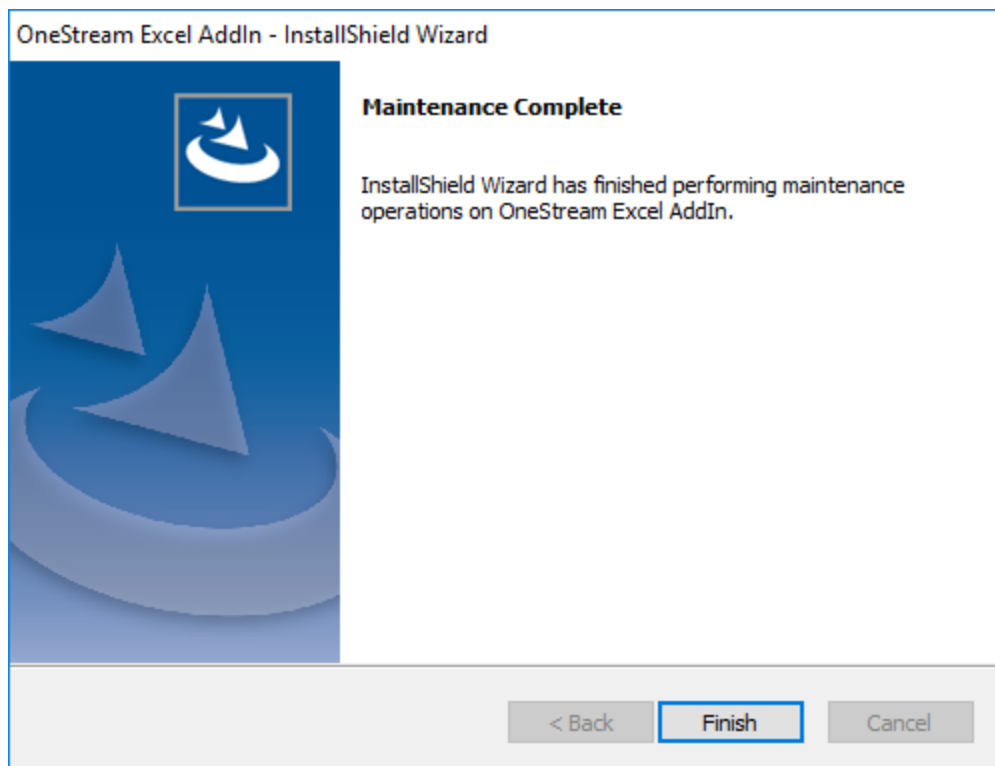
InstallShield

< Back Next > Cancel

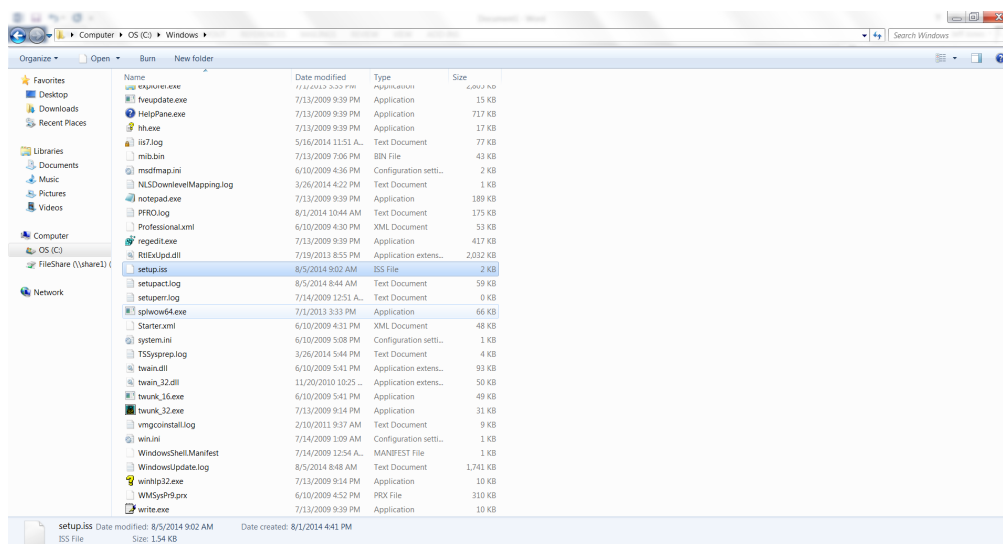




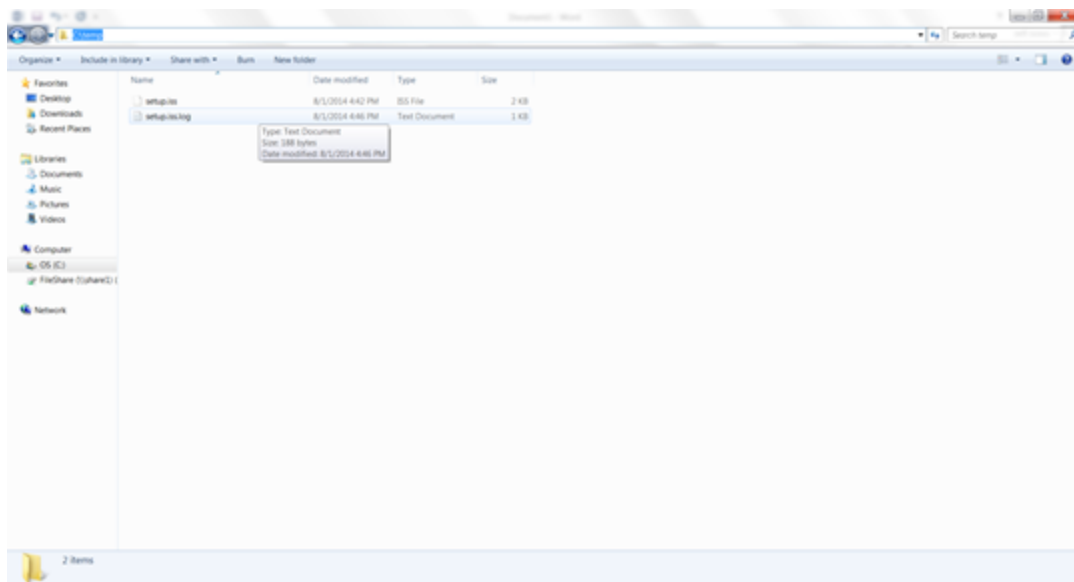




The resulting setup.iss file will be in the `c:\Windows` directory



2. Create a temporary folder on the machine and copy the `setup.iss` file to this location:



Use the following syntax to execute the pre-recorded silent install program:

```
Administrator: C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\jjones>"C:\OneStreamVersions\20140619, Release 3.2.1\OneStreamExcelAddI
n\setup.exe" /r

C:\Users\jjones>"C:\OneStreamVersions\20140619, Release 3.2.1\OneStreamExcelAddI
n\setup.exe" /s /f1"c:\temp\Excel.Install.iss" /f2"c:\temp\Excel.Install.log"

C:\Users\jjones>
```

Installing the OneStream Studio Client Package

The OneStream Studio client is recommended for users that need to create report layouts. OneStream Studio is a Windows client that connects to the OneStream servers through the OneStream web services. See Excel Add-In Installation in the previous section as the steps are similar to installing and updating the Studio Client.

Upgrading or Downgrading Excel Add-in

Upgrade or Downgrade Client via OneStream in the Browser

When connecting to a OneStream with the Excel Add-in or OneStream Studio that has a different version from the local version, a user will be prompted with a message that this is no longer compatible. Given the change in the .NET Framework version and other changes starting in 4.2, to upgrade to version 4.2 from any release prior to 4.2, a downgrade is not supported. The user has two options to upgrade this client:

1. Use the Client Updater functionality in the OneStream Windows App
2. Uninstall and re-install the Excel Add-in or OneStream Studio

NOTE: Given the change in the .NET Framework version and other changes starting in 4.2, to upgrade to version 4.2 from any release prior to 4.2, a downgrade is not supported.

Upgrade or Downgrade Client via OneStream Web App for Windows App

The Client Updater is used to retrieve updated software from the OneStream server for the Excel Add-In and Studio client programs when the version being used does not match the version of OneStream found on the server being connected. To perform the update, the user needs to be able to write to the installation folder. From this page, the user can first save all OneStream work and then restart OneStream using elevated Windows privileges using the Restart as Windows Administrator button.

Information regarding the current version of OneStream is displayed at the top of the window, as well as the module being reviewed, the location of the installation folder and the version status all appear within this window.

Example of versions that match:

Current XF Version: **4.2.0.8203**

Client Module


OneStream Excel AddIn ▼

Installation Folder: C:\Program Files (x86)\OneStream Software\OneStreamExcelAddIn

OneStream Excel AddIn XF Version: **4.2.0.8203**

OneStream Excel AddIn is up to date.

Example of versions that do not match:

 Client Updater

Current XF Version: **4.2.0.8203**

Client Module

OneStream Excel AddIn ▼

Installation Folder: C:\Program Files (x86)\OneStream Software\OneStreamExcelAddIn

OneStream Excel AddIn XF Version: **4.2.0.8204**

OneStream Excel AddIn is not up to date. Please press the Update button to download new XF installation files.

Update

Client Module

This field is used to select which application (OneStream Excel Add-In) needs to be compared to the current version of each that are currently installed on the user's desktop. Click the selection arrow and select the appropriate application.

If the versions do not match, click **Update**, then click **OK**.

NOTE: If any versions of Excel or Studio are open, they must be closed before clicking OK to proceed.

NOTE: A backup folder with files for the outdated version is automatically created and saved as part of the update process. It can be found in the same location as the newly updated version folder.

If this functionality has been disabled, the following message appears when trying to update those applications. "The Client Updater has been disabled by your System Administrator. Use OneStream's full client installation program, or see your System Administrator."