Marketplace Solutions - v8+ Upgrade Installation Guidance

updated April 2024

Recommendations

1   **Upgrade Solutions in pre-v8+ if possible (if current version is v7.1.1 or higher)**

2   **ACM must be upgraded to PV710 SV100 in a v7.1.1 or higher platform**

3   **If MP Solution upgrades are performed in v8+ migration instance, use the following steps:**

1. Load the latest MP upgrade package via Application |Load/Extract

   (now all BR will compile - enabling Step 2 ... which is required to perform the normal solution upgrade process starting with Step 3)
2. Within the currently installed version of the solution, navigate to the uninstall dashboard and run the Uninstall UI function
3. Load the MP upgrade package again
4. Follow the normal upgrade steps outlined in the Solution install instructions

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5. Complete other v8+ Upgrade Activities
6. Following the 'Final Cutover' process, run 'Setup Tables' for each MP Solution   (even those you didn't upgrade)

4   **PAM PV620 SV103 mitigates a low impact security vulnerability in Python 3.6 by loading Python "on-demand" vs. always being resident on server images.**

Marketplace Solution v8+ Compatibility

updated May 2024

Solution		Pre-requisities (perform prior to v8+ Migration)		v8+ Comptible Solutions	
		Platform v7.0.x or Earlier	Platform v7.1.1 to v7.4.x	Minimum version	Current version* *(note: PV = req. platform ver.)
ACM	Application Control Manager	1. Upgrade to latest v7.x (now v7.4.2)2. Upgrade ACM to PV710 SV100		PV710 SV101	PV800 SV100
AST	Administrator Solution Tool			PV740 SV101	PV740 SV101
CAT	Cloud Administration Tools			PV600 SV100	PV600 SV102
CPP	Capital Planning			PV620 SV102	same as minimum
CSP	Cash Planning			PV620 SV102	same as minimum
DCU	Dimension Comparison Utility			All versions compatible	PV600 SCV100
DFM	Data Entry 123			PV440 SV100	same as minimum
FEM	File Explorer Manager			PV650 SV102	same as minimum
GDR	Guided Reporting			PV600 SV102	same as minimum
LTS	Load Test Suite			All versions compatible	PV600 SV100
MDB	Excel Metadata Builder			PV520 SV101	same as minimum
MST	MarketPlace Solution Tools			PV720 SV100	same as minimum
OFC	OneStream Financial Close	Upgrade to latest v7.x (now v7.4.2)		PV710 SV201	PV800 SV200
OPS	Parcel Service			PV630 SV100	same as minimum
OSD	System Diagnostics			PV620 SV201	PV620 SV202
OST	Sample Templates			PV600 SV100	same as minimum
PAM	Predictive Analytics 123	Does not require Data Science pkg		PV620 SV103	same as minimum
PLP	People Planning			PV620 SV102	PV620 SV104
RCM	Account Reconciliations	1. Upgrade RCM to PV440 SV200+ 2. Upgrade to v8+ compatitble OFC	Upgrade to v8+ compatitble OFC	**OFC** PV710 SV201	PV800 SV200
SML	Sensible Machine Learning			PV650 SV221	PV810 SV320
TXM	Transaction Matching	1. Upgrade TXM to PV530 SV201+ 2. Upgrade to v8+ compatitble OFC	Upgrade to v8+ compatitble OFC	**OFC** PV710 SV201	PV800 SV200
UTM	Task Manager			PV660 SV102	PV800 SV100
XAT	XperiFlow Administration Tools			PV650 SV100	same as minimum

Marketplace Solutions transitioning out of support

updated March 2024

Solutions moving to OpenPlace (OneStream support ends AUG-2024)		v8+ Comptible Solutions Minimum version
AWS	Actor Workspace	PV410 SV100
CMR	Close Manager	All versions compatible
HDK	Help Desk	PV640 SV100
PBL	Process Blocker	PV430 SV100
PCM	Process Control Manager	PV430 SV100
POW	PowerShell Scripting	All versions compatible
PRM	Provision Request Manager	PV440 SV104
TXP	Tax Provision	PV620 SV300
TRM	Train Me (Video Help)	PV410 SV100

Solutions reaching End of Life AUG-2024		
EUTCV	End User Training - Cube Views	N/A
EUTEA	End User Training - Excel Analysis	N/A
EUTRB	End User Training - Report Books	N/A
EUTSA	End User Training - Spreadsheet Analysis	N/A
EUTV	End User Training - Videos	N/A
EUTW	End User Training - Workflow	N/A
EUTXFD	End User Training - Extensible Docs	N/A