

OneStream v8+ Upgrade Checklist for Self-Hosted Customers

Updated May 1, 2024 for Platform v8.2

Before you Begin your v8.2 Upgrade

OneStream Contacts

Customer Success: contact your customer support manager to discuss your v8.2 upgrade plans

Customer Support: You may engage support for billable services to lead upgrade activities. As always, support is available for questions or problem resolution

OneStream Resources

[v8+ Updates Group in ONECommunity](#)

Notable content:

[Platform v8 Upgrade Office Hours](#)

Register to attend Office Hour meetings using this link. They are for customers to ask upgrade preparation questions to OneStream SMEs

[What's the difference between Cloud and Self-Hosted v8+ Upgrades](#)

[All about .NET...with your v8+ Upgrade](#)

[Platform v8 Upgrade FAQ](#)

[Marketplace Solutions: v8+ Upgrade recommendations](#)

v8.2 Upgrade Guide

available on Solution Exchange\Platform or the

[Upgrade Guide \(Direct Download\)](#)

v8.2 Installation Guide - contains System Req.

available on Solution Exchange\Platform or the

[Installation Guide \(Direct Download\)](#)

v8.2 Release Notes

available on Solution Exchange\Platform or the

[Release Notes \(Direct Download\)](#)

v8.2 Release Differences Course

available on OneStream Navigator

Preparation Activities

These are items of note from the Upgrade Prerequisites document (this list is generally sent to customers engaging in the paid Support Upgrade Service)

1. OneStream strongly recommends upgrading your Development environment to version 8 first before Production
2. Compile all business rules in your V7 applications and make references of any rules and member formulas that do not compile. The business rules/member formulas that do not compile in V7 will not need to be considered for fixing in the upgraded version 8 environment since they will not have worked to begin with.
3. Download OneStream v8.2 from Solution Exchange/Platform
Copy the server install file to all servers you intend to upgrade
6. Back up your databases and configuration files
7. Clear your Log - Error, Task, and Logon Activity ... will increase database upgrade speed
8. Enable IIS role Application initialization on all servers
9. Validate you have your OneStream service user password ready for the upgrade
10. Validate you have your OneStream SQL user password ready for the upgrade
11. Plan for Excel Add-In upgrades on user machines
12. Plan for Windows Client upgrades if ClickOnce is not used

.NET Installation preparation

OneStream v8.0 & 8.1 are based on the .NET6 Development Framework. Upgrades from pre-v8 Platform versions will require installation of the following runtimes:

Each Application and Web Server

[Prepare to install .NET ASP.NET 'Hosting Bundle' runtime.](#)

OneStream recommends v6.0.14 or higher ... as of Nov-2023 current version is 6.0.24

[Prepare to install the .NET Desktop Runtime](#)

OneStream recommends v6.0.14 or higher ... as of Nov-2023 current version is 6.0.24

Each Workstation accessing OneStream via the Windows Client

[Prepare to install the .NET Desktop Runtime](#)

OneStream recommends v6.0.14 or higher ... as of Nov-2023 current version is 6.0.24

All DLL files referenced by Business Rules must be .NET Core compatible (.NET Standard or .NET Core). .NET Framework DLLs will fail v8.1 compilation

Current OS Version OneStream v8.2 are based on the .NET8 Development Framework. Upgrades from pre-v8 Platform versions will require installation of the following runtimes:

Each Application and Web Server

[Prepare to install .NET ASP .NET 'Hosting Bundle' runtime.](#)
[Prepare to install the .NET Desktop Runtime](#)

OneStream recommends v8.0.2 or higher ... as of Feb-2024 current version is 8.0.2
OneStream recommends v8.0.2 or higher ... as of Feb-2024 current version is 8.0.2

Each Workstation accessing OneStream via the Windows Client

[Prepare to install the .NET Desktop Runtime](#)

OneStream recommends v8.0.2 or higher ... as of Feb-2024 current version is 8.0.2

All DLL files referenced by Business Rules must be .NET Core compatible (.NET Standard or .NET Core). .NET Framework DLLs will fail v8.2 compilation

v8.2 Upgrade 'Need to Know'

Important Callouts from the v8.2 Upgrade Guide

1. ERPConnect45.dll - for SAP Connectivity - no longer packaged with the Platform. Download ERPConnectStandard20.dll from Solution Exchange\Platform
ERPConnectStandard20.dll, and all data source connection dlls, should be placed in the Local Gateway Server Referenced BusinessRule Assembly Folder - established in the LGS Config
2. You must update the OneStream Database Server's connection string via Application Server config utility: Trust Certificate = True
3. You must enable the Trust Certificate (=True) for all Application and Framework databases via the Database config utility
4. Data access driver for SQL Server has been updated from System.Data.SqlClient to Microsoft.Data.SqlClient
5. Upgrade database schemas to v8.2
6. Run the Upgrade Assistant Utility

Marketplace Solution Upgrades

Upgrades from pre-v8 to v8+ require upgrades to the following Marketplace Solutions for compatibility

[See the v8+ Upgrade Group in ONECommunity for more details](#)

Deprecations as of Platform v8

Component	Mitigation
Client API	Use Task Scheduler or REST API
VBA ROPC Authentictaion	Use SSO Tokens
MVC (OneStream Mobile)	Use BrowserUx via Private Preview Program for an End User browser experience, including tablet access