Upgrade Guide

8.0.0 Release

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Scheduling the Upgrade

All OneStream customers are encouraged to prepare for their Platform version 8.0 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 version 8.0 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 version 8 from Solution Exchange, but are also encouraged to engage their Customer Success representative to review preparation activities to ensure a successful 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 version 8.0 was developed using Microsoft .NET 6 . As a result, all Business Rules must be tailored for .NET 6. For more information, see [v8.0 / .NET 6 Readiness.](#)

- OneStream 8.0 requires Microsoft .NET 6.

- OneStream Servers requires IIS 7 or later.

- .NET Desktop Runtime 6.0.14 or later.

- ASP.NET Core Runtime 6.0.14 "Hosting Bundle" 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.

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

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 **web.config**.

      - **On application servers**: `C:\Program Files\OneStreamSoftware\ OneStreamAppRoot\OneStreamApp` and select **web.config**.

d. The file opens and displays the path to the **XFAppServerConfig.xml** and **XFWebServerConfig.xml** configuration files.
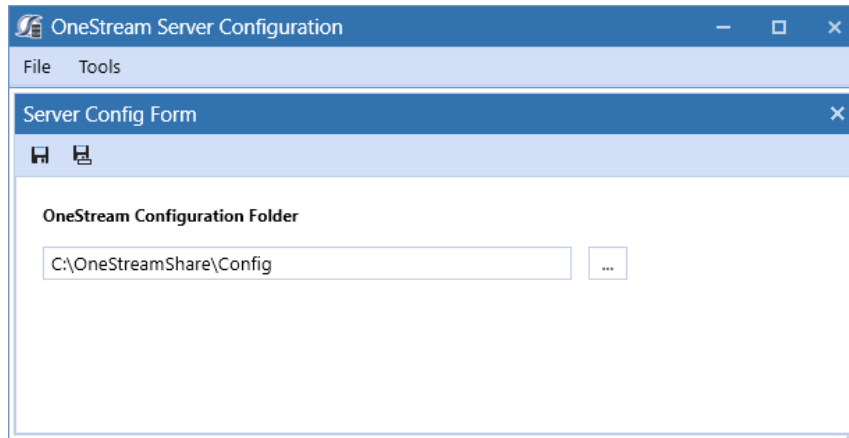
e. Copy and paste the path to the configuration file. You will specify this location during the upgrade.

> **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:

- 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 ASP.NET Core Runtime 6.0.14 "Hosting Bundle" or later found here.

9. For all client machines running OneStream, install .NET Desktop Runtime 6.0.14 or later found here.

Upgrade System Components

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

Stop the OneStream Application Pools

1. On each OneStream server, launch Internet Information Services Manager by selecting **Start** > **Control Panel** > **Administrative Tools** > **Internet Information Services (IIS) Manager**.

2. Expand the server and select **Application Pools**. This displays all pools to the right.

3. Right-click these pools and select **Stop**:

   - OneStreamAppAppPool

   - OneStreamWebAppPool

   - OneStreamMgmtAppPool

4. Repeat these steps for each server in the environment.

5. Close any open OneStream Configuration Utilities.

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**.

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

This is an additional step for version 8.0 and must be run after the Framework and Application Databases have been upgraded. 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

- BUX server:

  - C:\Program Files\OneStream Software\OneStreamWebUIRoot\OneStreamWebUI\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.
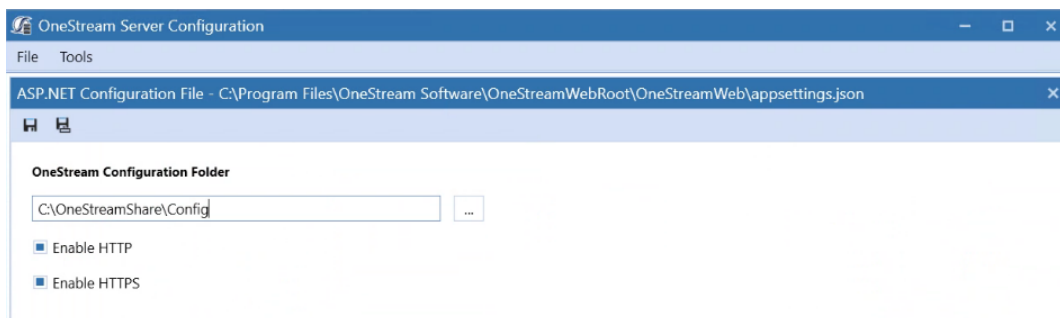
   > **NOTE:** Clear **Enable HTTP** when SSL is enabled or clear **Enable HTTPS** when SSL is not enabled.

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 Login

1. Navigate to the OneStream Windows App URL:

- **On Prem**: http://<webserver>:50001/OneStreamWeb/OneStreamWindowsApp.aspx

- **Cloud**: https://<customer>.onestreamcloud.com/onestreamweb

2. Click **Open**to launch the Click Once 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](#).

Version 8.0 / .NET 6 Readiness

Upgrading your OneStream Platform to version 8.0 or later requires .NET 6 for full compatibility.

This Platform release 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.

Business Rules

For more information, visit the Platform v8+ Upgrades page on ONECommunity.

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. 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 morel upgrade options.

Smart Integration Connector

Smart Integration Connector is required for OneStream Cloud integration with local customer data sources when using OneStream Platform version 8.0 or higher. VPN is no longer supported with version 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 8.0.

Self-hosted Customers: No changes necessary. Legacy Authentication support is continued.

.NET 6 Desktop Runtime and ASP.NET Runtime

Download the .NET Desktop Runtime 6.0.14 or later installer here.

Download the ASP.NET Core Runtime 6.0.14 "Hosting Bundle" or later installer here.

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 version 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 8.0.

MarketPlace Solution	Version
Administrator Solution Tools	PV620 SV101
Application Control Manager	PV710 SV100
Capital Planning	PV620 SV102
Cash Planning	PV620 SV102
Cloud Administration Tools	PV600 SV100
Contract Compliance	PV620 SV102

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 SV101
Provision Request Manager	PV440 SV104
Reporting Compliance	PV620 SV103
Sales Planning	PV620 SV102
Sample Templates	PV600 SV100
Scenario Analysis 123	PV530 SV100

MarketPlace Solution	Version
Security Audit Reports	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
XML Security Remover	PV410 SV100

Help and Miscellaneous

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