



# Upgrade Guide

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7.2.1 Release

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# Scheduling the Upgrade

Although this guide identifies the typical upgrade steps required, we recommend that the OneStream Software Technical Support Team performs your upgrade. Contact them at [support@onestreamsoftware.com](mailto:support@onestreamsoftware.com).

# 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*.

- If upgrading from OneStream 5.3.x or earlier, upgrade to 4.8 of the Microsoft .NET Framework for the latest security standards and advanced features.
- If upgrading from OneStream 6.4 or earlier, update the database schema. We recommend full database backups.
- If you have 4.7, upgrade to version 4.8 of the Microsoft .NET Framework. You can install this component during a standard Microsoft Windows update.
- In each application, complete the **Compile all Business Rules and Formulas** check to ensure that business rules use the proper syntax.

## Internet Explorer End-of-Use

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 of your organization. Starting with 7.0, newly created shortcuts will be created using PresentationHost.exe, which is a component provided by the .NET Framework. Upgrading to 7.0 will not automatically update existing shortcuts. You need to 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).

## Requirements

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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 of OneStream when IE is disabled inside of your organization. Starting with 7.0, the external web pages will be embedded using the Microsoft Edge WebView2 runtime control. Microsoft is automatically installing 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 of 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 allow embedding external web pages:

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

# Before Upgrading

Perform these tasks before upgrading:

1. Perform a full backup of all OneStream databases.
2. Download the OneStream installation package from the MarketPlace:
  - a. Log in to the MarketPlace and select **Software Download** to get the latest version of OneStream.
  - b. Download the Full Package or Server Software to get the appropriate setup files for the server installation.
3. Verify the location of the OneStream configuration files:
  - a. On each 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

The file opens and displays the path to the **XFAppServerConfig.xml** and **XFWebServerConfig.xml** configuration files.
4. For a backup, copy these configuration files.
5. Copy and paste the path to the configuration file. You will specify this location during the upgrade.
6. Close the file without saving and exit the utility.

## Before Upgrading

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7. 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.
  
8. 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.



# 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
  - OneStreamMobileAppPool
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**.

# 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 **Setup.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:** You can choose the Database Configuration 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 **Setup.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

1. Browse to the OneStream package, right-click **Setup.exe** and select **Run as Administrator**.
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 these steps for the application databases as necessary.

## Update the ASP.NET Configuration File

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:
  - **Application server:** C:\Program Files\OneStream Software\OneStreamAppRoot\OneStreamApp
  - **Web servers:**
    - C:\Program Files\OneStream Software\OneStreamWebRoot\OneStreamWeb
    - C:\Program Files\OneStream Software\OneStreamWebApiRoot\OneStreamWebApi
  - **Mobile:** C:\Program Files\OneStream Software\OneStreamMVCRoot
4. Select the **web.config** file.
5. When the file opens, copy the directory path of the configuration files.
6. Save and close the file.
7. Repeat these steps on each 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, Web Server and Mobile Server sites.
5. Select **Update IIS Default Settings**.
6. Select options to update IIS for the appropriate websites:

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- a. **Use Web Server Settings:** Specify the Mobile Web Server site.
  - b. **Use Web Server Settings:** Specify the Web Server site.
  - c. **Use App Server Settings:** Specify the App Server site.
  - d. **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:  
`http://<webserver>:50001/OneStreamWeb/OneStreamWindowsApp.asp`
2. Click **Run** 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, being sure to:
  - Right-click the grid and export any errors for analysis using an Excel file format.

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- Apply updates as needed.
2. Download Standard Reports from the MarketPlace and import the reports.

# Resolving Business Rule Compiler Errors

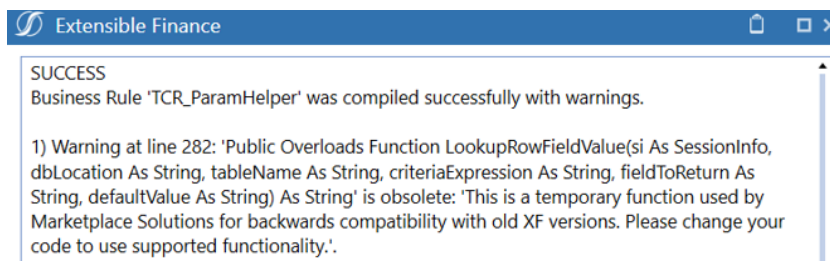
See:

- "Compiler Update - Related Errors" below.
- "Unsupported NameSpace - Related Errors" on the next page.

## Compiler Update - Related Errors

Platform releases may include updates and enhancements to the Business Rules compiler, usually to improve syntax detection. Administrators must resolve these errors to fully compile business rules. Warning messages identify line items that will function but that you should update to support the latest compiler's requirements. How to resolve these warnings varies. You may be able to use a provided replacement function or change to a function's properties.

For example, the message below indicates a **LookupRowFieldValue** function property changed. Review the current rule and function definition to determine that the property for **"Criteria as a String"** changed. It now defines the field as a **dbWhere** object.



These were the old properties:

```
LookupRowFieldValue(ByVal si As SessionInfo, ByVal dbLocation As String, ByVal tableName As String, ByVal criteriaExpression As String, ByVal fieldToReturn As String, ByVal defaultValue As String) As String
```

To resolve the condition, make the required change. In this example, use a `dbWhere` object to define the criteria against the target database table.



## Resolving Business Rule Compiler Errors

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These are the new properties as shown below:

```
LookupRowFieldValue(ByVal si As SessionInfo, ByVal dbLocation As String, ByVal tableName  
As String,ByVal dbWheres As List(Of DbWhere), ByVal fieldToReturn As String, ByVal  
defaultValue As String) As String
```

```
'Dim byord As New List(Of DbOrderBy)

'Get the clean description for the content title
Dim dashboardName As String = args.NameValuePairs.XFGetValue("SelectedDashboard", "[No Selection]")
Dim dbWhereList As New List(Of DbWhere)
dbWhereList.Add(New DbWhere("Name", DbOperator.IsEqualTo, dashboardName))

Dim dashboardDesc As String = BRApi.Database.LookupRowFieldValue(si, "App", "Dashboard", dbWhereList, "Description", String.Empty)
```

## Unsupported NameSpace - Related Errors

OneStream uses Vb.Net language to help you implement custom solutions using predefined libraries and other compatible third-party libraries. When business rules compile, these default NameSpaces also compile:

- **microsoft.visualbasic**
- **system.linq**
- **system.collections.generic**
- **system.collections**
- **system.text**

**CAUTION:** If you use them, do not remove provided NameSpaces them from business rules. Removing NameSpaces causes compile errors.

These predefined NameSpaces are provided with business rules:

- **Imports System**
- **Imports System.Data**
- **Imports System.Data.Common**

## Resolving Business Rule Compiler Errors

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- **Imports System.IO**
- **Imports System.Collections.Generic**
- **Imports System.Globalization**
- **Imports System.Linq**
- **Imports Microsoft.VisualBasic**
- **Imports System.Windows.Forms**
- **Imports OneStream.Shared.Common**
- **Imports OneStream.Shared.Wcf**
- **Imports OneStream.Shared.Engine**
- **Imports OneStream.Shared.Database**
- **Imports OneStream.Stage.Engine**
- **Imports OneStream.Stage.Database**
- **Imports OneStream.Finance.Engine**
- **Imports OneStream.Finance.Database**

Resolving an unsupported NameSpace issue depends on where the NameSpace is used.

- If used in a business rule file: Add the NameSpace to the **Imports** code so the business rule can compile. For example:

```
16 Imports OneStream.Finance.Engine
17 Imports OneStream.Finance.Database
18 Imports System.Text.RegularExpressions
19
```

- If used in a member formula: Add the full NameSpace to the affected expression or variable, since you cannot modify **Imports** code. For example:

## Resolving Business Rule Compiler Errors

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