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This guide describes the necessary steps to setup and use the Excel Add-In Installer (XLI) Solution.

Excel Add-In Installer (XLI) Overview

The Excel Add-In Installer *(XLI)* Solution provides a method for self-service distribution of the OneStream XF Excel Add-In and OneStream XF Studio clients. This solution supplies a framework for hosting the client setup files and sharing them to OneStream remote users within an organization.
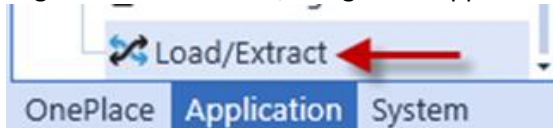
Excel Add-In Installer Setup

Setting up the Excel Add-In Installer Solution is broken into the following steps.

How to Install XLI

First, check the related *Release Notes* to determine if an Uninstall of the User Interface is necessary and then see that chapter for instructions. If the *Release Notes* say that an overinstall is allowed, then proceed with these instructions from here:

Download the Excel Add-In Installer Solution from the XF MarketPlace. The package is a zip file named *XLI_PVxxx_SVzzz_PackageContents.zip* where xxx and zzz represent version numbers for OneStream XF and the solution. The *PVxxx* number (e.g. 430) represents the minimum XF Platform Version (e.g. 4.3.0) required in order to implement this Solution Version (i.e. *SVxxx*).

Log into OneStream XF, navigate to Application Tab | Tools | Load/Extract.

Click *Select File,* navigate to the zip file, and click *Load* .

Navigate to OnePlace | Dashboards | Excel AddIn Installer (XLI) | Excel AddIn Installer to confirm the solution has been loaded into the OneStream XF application. See the *Settings* section later in this document for completing the solution setup and uploading the OneStream XF client installation files.
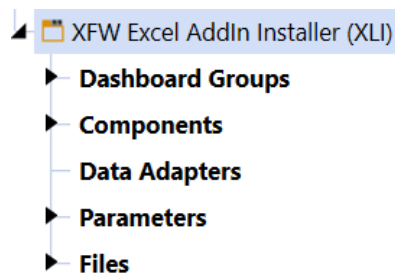
Package Contents

It is not recommended to rename or modify the included Dashboard Components or Business Rules that are included with this solution.

Dashboard Maintenance Unit

XFW Excel AddIn Installer (XLI)

This is the solution Dashboard Maintenance Unit that provides all of the Dashboard Components for the solution user interface.
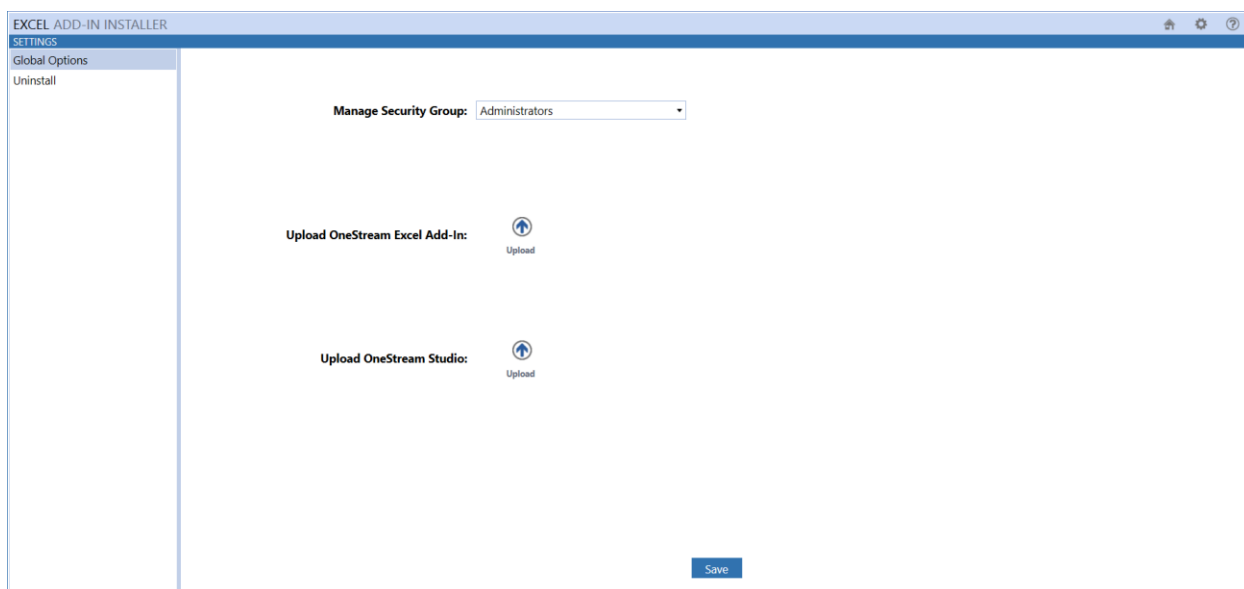
Business Rules

XLI_SolutionHelper

This is a Dashboard Extender Business Rule that provides various helper functions for the XLI solution. These helper functions include management of the solution setup, uploading client installation files and uninstall functions.

XLI_ParamHelper

This is a Conditional Parameter helper functions XFBR String Business Rule. This rule is used to provide conditional parameter processing functions that allow a parameter value to be interpreted and substituted with a different string.

Settings - ⚙

The Settings screen contains all of the setup options for the OneStream Excel Add-In Installer Solution.

Global Options

Manage Security Group

The security group that can access the *Settings* page and upload OneStream client installation files (setup.exe).

Uploading Client Installation Packages

There are a few important notes to consider before uploading the client installation packages to the OneStream XF server environment. This solution uploads the client installation packages to the XF Framework Database for the OneStream XF server environment. This allows one upload per XF platform release to be shared with all of the XF applications in that server environment.

The client installation package uploads should be done during off-peak hours for the best performance. The OneStream XF Windows client should be used for the uploads for best upload performance. It is recommended that OneStream XF Cloud customers requiring the use of the IE Silverlight client, submit a ticket to OneStream Support to upload the client installation packages to their XF Cloud environments.

Upload OneStream Excel Add-In: ⬆ Upload

The link to upload the OneStream Excel Add-In *setup.exe* file to the server environment. This will open a browser to select the source *setup.exe* file to be uploaded. The upload times to OneStream XF Cloud environments may take a few minutes to complete. It is important to upload the correct Platform Version of the installation files for the environment. This installation file should be updated with each OneStream XF Platform version upgrade.

Upload OneStream Studio Client: ⬆ Upload

The link to upload the OneStream Studio client *setup.exe* file to the server environment. This will open a browser to select the source *setup.exe* file to be uploaded. The upload time to OneStream XF Cloud environments may take a few minutes to complete. It is important to upload the correct Platform Version of the installation files for the environment. This installation file should be updated with each OneStream XF Platform version upgrade.
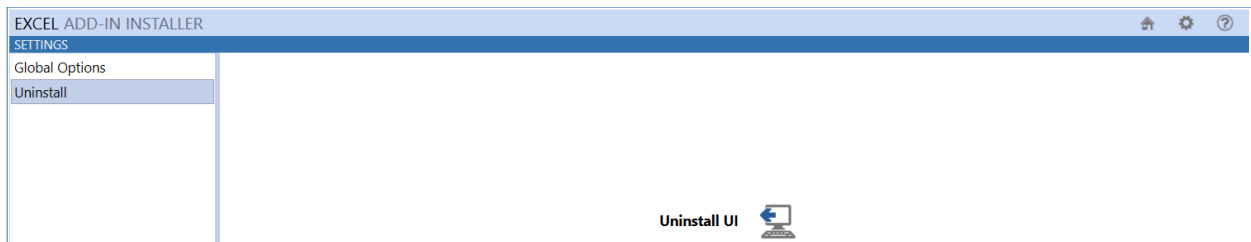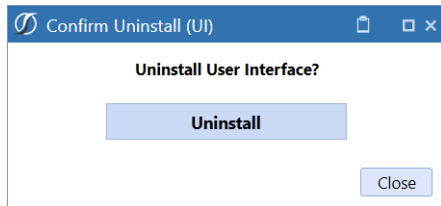
Uninstall

The uninstall screen enables the removal of the Excel Add-In Installer solution User Interface (UI).

Uninstall UI

The Uninstall UI button opens a dialog to confirm removal of the Excel Add-In Installer solution UI.

Using Excel Add-In Installer Solution

Downloading Client Installations - ⊕

Navigate to OnePlace | Dashboards | Excel AddIn Installer (XLI) | Excel AddIn Installer to display the solution Dashboard. Follow the instructions displayed on the solution Dashboard.

Step 1

Close the current version of the clients that are installed on the PC. (close Microsoft Excel and/or OneStream XF Studio).
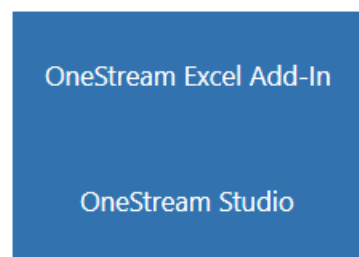
Step 2

Uninstall OneStream Excel Add-In and/or OneStream Studio (if currently installed).

This can be done by going to the Microsoft Windows Control Panel | Programs |Programs and Features | Uninstall to select the current version of the client that is installed on the PC. Then right mouse click on that client and select Uninstall. Follow the prompts to complete the uninstall.

Step 3
Return to the OneStream Excel AddIn Installer Dashboard to continue with Step 3. Click on the link for the OneStream XF client (OneStream Excel Add-In or OneStream Studio) that needs to be installed on the PC.

This will download the client *setup.exe* installation file and begin the installation process. Follow the Installation Wizard prompts to complete the installation of the selected client.

Solution Database Migration Advice

This solution does not install database tables and the setup process is easily maintained. It is recommended to install this solution in the primary OneStream XF application in each server environment that requires self-service access for users to install the OneStream XF clients (Excel Add-In & Studio) on their PCs.

Optimal Display Settings

OneStream XF and XF 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.

Modifying MarketPlace Solutions

A few cautions and disclaimers when modifying a MarketPlace Solution:

- Major changes to Business Rules or custom tables within a MarketPlace Solution will not be supported through normal channels as the resulting solution is significantly different from the core solution.

- If changes are made to any Dashboard object or Business Rule, consider renaming it or copying it to a new object first. This is important because if there is an upgrade to the MarketPlace Solution in the future and the customer applies the upgrade, this will overlay and wipe out the changes. This also applies when updating any of the standard reports and Dashboards.

- If modifications are made to a MarketPlace Solution, upgrading to later versions will be more complex depending on the degree of customization. Simple changes such as changing a logo or colors on a Dashboard do not impact upgrades significantly. Making changes to the custom

database tables and Business Rules, which should be avoided, will make an upgrade even more complicated.