



Specialty Planning and Specialty Compliance Release Notes

PV620 SV102

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Release PV620 SV102

This release addresses improvements to the People Planning Solution supporting the Replace and Merge functionality, Calculation capabilities and Status Value name modifications.

IMPORTANT: The PV620 SV102 release only pertains to People Planning. This release does not affect the other Specialty Planning and Compliance solutions.

Prerequisites

The OneStream Software platform version 6.2.0 or later is required.

New

- Added an option to calculate only those records updated in a calculated register. (MP2-1112)

A new Update button allows the calculations that are enabled in the Execution List to apply only to records that have been updated, added, or deleted since the last calculation was performed.

- Enhanced the Copy Register Replace and Merge Functionality. (MP2-911, MP2-140)

The Replace Copy method deletes the existing target register information based on workflow profile, scenario, and time.

The Merge Copy method scans the data in the register to determine if the source data already exists in the Workflow Profile, Scenario and Time criteria defined.

NOTE: All other workflow profiles using the same scenario and time for Replace Copy and Merge Copy remain unchanged.

- Added a dialog box for People Planning replace on import. (MP2-210, MP2-55)

When you select Import Register Items, an Excel Template Import dialog box allows you to select criteria for loading your data.

- Selecting the Update button recalculates the modifications and applies the changes within the Workflow Profile, Scenario and Time they were modified in. (MP2-1403)

Changed

None

Fixed

- Modified the DeleteSinglePlan function in the PLP_SolutionHelper to work with the new custom Where clause functionality. (MP2-1152)

When filters are present in a custom Where clause for one or more columns, any updates made to items based on the filter are recalculated and populated in the Plan. The data not included in the filters remains untouched and is not deleted in the register and is not present in the Calc Plan Data.

When filters are present in a custom Where clause to delete specific items, those items that are deleted are removed from the calc plan table and only occur when you click Calculate.

- Changed a Status Value name that removes data from the register. (MP2-423)

You will receive a validation message after saving a changed Status Value that is used in the register. To maintain accurate Status Values used in a register, a message prompt displays stating that the named Status Value is in use, *Cancel all changes since the last save*. To create a new status, insert a row to the Status List Value table and update the People Register, Execution List, and re-calculate accordingly.

Status value behavior:

- If a Status Value is not used in the Register, you can update the name.
- If a Status Value in use is deleted, a validation message displays stating that the named Status Value is in use and the Status Value remains in the table.
- If a Status Value is not being used and you delete it, it will be removed from the table.

Known Issues

None

Release PV620 SV101

The theme of this release is defect resolution.

Deployment

- Current users of the Planning and Compliance solutions should review Help & Miscellaneous Information section of the Planning / Compliance Setup Instructions prior to upgrading.
- It is recommended to Uninstall UI for the previous release (not Uninstall Full) before installing PV620 SV101.

New

None

Changed

None

Fixed

- The solution three letter acronym (also referred to as a solution code) was replaced in the Dashboard and Profile names throughout the solution. This acronym is still removed from the Description fields where applicable. (24995)

Known Issues

- Use of apostrophes in custom field lists (e.g.: Control List, Status Lists, Account, Account Types, etc.) causes plan calculations to fail. Use of this character in custom fields is not supported.

- Uninstalling this solution will remove reference from any Workspace Dashboard Name in the Workflow Profile. Upgrading to the new release will not re-establish this connection (1here's what I really need0898)

Release PV620 SV100

The theme of this release is minor enhancements and defect resolution.

Deployment

- Current users of the Planning and Compliance solutions should review Help & Miscellaneous Information section of the Planning / Compliance Setup Instructions prior to upgrading.
- It is recommended to Uninstall UI for the previous release (not Uninstall Full) before installing the new PV620 SV100 release for all of the Planning and Compliance solutions. Note that any standard solution artifacts that may have been modified previously will be overwritten. If there is any concern of this, extract the entire related Dashboard Maintenance Unit and backup the related database tables prior to installing any of these PV620 SV100 release solutions.
- Many customers have multiple copies of some of these solutions installed in the same OneStream application (e.g. two or more copies of Thing Planning). Please contact OneStream Support for assistance when upgrading multiple copies of a given solution to make sure all of the components are properly upgraded. The OneStream MarketPlace Solution Tools solution helps to expedite this process, but the currently installed copies should be reviewed prior to attempting an upgrade.

New

- Custom event handler allows restricting the number of Register Items before applying Calculations, eliminating unnecessary application of calculations. (21039)

Changed

- Updated icons/buttons in Main Navigation, Register, Audit, Setup, Settings, and Installation across all solutions. (19837, 21550)
- Updated the XLSX Import Templates for: Single WF/Multi WF/Exception Plan Register, Calculation Plans, Allocations Methods and Account Setup. (22507, 22534, 22591, 22820, 22828, 22836)

- Remove non-sales type data from Allocations, Calculations and Execution Lists created during setup in Sales Planning. (24059)
- Prevent multiple users from initiating planning calculations simultaneously within the same Workflow. (8674)

Fixed

- Custom Events Handler Business Rule updated to terminate Save actions for insertions, deletions, and updates across all solutions. (17856)
- The CustomEventHandler now confirms deletion of a row in the Register upon clicking Save in People Planning. (21377)
- Blank amount import template cells now default to zero (0) in all appropriate columns in all solutions. (8003)
- The InCode Register Field Name now displays in the Register Field Order table in Thing Planning (7611)
- Thing Register now successfully saves rows added to the register in Thing Planning. (21752)
- Calculations resulting up to 15 digits (quadrillion) now display correctly in all solutions. (11895, 21951)
- Workflows can now be successfully completed utilizing the Solution Helper Business Rule in Reporting Compliance. (12104)
- Changing case sensitivity of an existing Status loses reference to Register Status. (22338)

Known Issues

None

Contacting Support

OneStream Support can be contacted at any time by registering at <http://support.onestreamsoftware.com> and then emailing support@onestreamsoftware.com.