



Specialty Planning / Specialty Compliance Release Notes

PV620 SV103

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Specialty Planning / Specialty Compliance Release PV620 SV103

The theme of this release is bug fixes.

Deployment

- This release supports an overinstall however, OneStream strongly recommends an *Uninstall UI* instead.
- Use OneStream Software platform version 6.2.0 or later with this version.

New

None.

Enhancements

None.

Fixed

- RegisterID containing an underscore for its identification will create journal entries successfully. (MP2-699)

Known Issues

None.

Contacting Support

Contact OneStream Support by registering at <http://support.onestreamsoftware.com> and then emailing support@onestreamsoftware.com.

Specialty Planning / Specialty Compliance Release PV620 SV102

The theme of this release is bug fixes.

Deployment

- This release supports an overinstall however, OneStream strongly recommends an *Uninstall UI* instead.
- Use OneStream Software platform version 6.2.0 or later with this version.

New

None.

Enhancements

None.

Fixed

- RegisterID containing an underscore for its identification can be copied successfully. (MP-4068)
- Journal entries create properly when member ID is set to zero. (MP-220)

Specialty Planning / Specialty Compliance Release PV620 SV101

The theme of this release is defect resolution.

Release Date

December 16, 2020

Deployment

- Current users of the Specialty Planning and Specialty Compliance solutions should review Help & Miscellaneous Information section of the Specialty Planning / Specialty 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)

Specialty Planning / Specialty Compliance Release PV620 SV100

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

Release Date

December 2, 2020

Deployment

- Current users of the Specialty Planning and Specialty Compliance solutions should review Help & Miscellaneous Information section of the Specialty Planning / Specialty 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 Specialty Planning and Specialty 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 XF 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)

Release PV430 SV202 for All Specialty Planning & Compliance Solutions

The theme of this release is minor correction.

Release Date: 06/05/2019

Deployment

- Current users of the Specialty Planning and Specialty Compliance solutions should review this section of the Instructions document prior to upgrading: Appendix 6: Considerations for Upgrading Specialty Planning & Compliance Solutions.
- It is recommended to Uninstall UI for the previous release (not Uninstall Full) before installing the new PV430 SV202 release for all of the Specialty Planning and Specialty 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 PV430 SV202 release solutions.
- Many customers have multiple copies of some of these solutions installed in the same OneStream XF 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 (MST) solution helps to expedite this process, but the currently installed copies should be reviewed prior to attempting an upgrade.

New

- None

Changed

- None

Fixed

- Resolved a business rule issue to make the solutions compatible with versions 4.3 and higher. (11507)

Release PV430 SV201 for All Specialty Planning & Compliance Solutions

The theme of this release is minor correction.

Release Date: 05/13/2019

Deployment

- Current users of the Specialty Planning and Specialty Compliance solutions should review this section of the Instructions document prior to upgrading: Appendix 6: Considerations for Upgrading Specialty Planning & Compliance Solutions.
- It is recommended to Uninstall UI for the previous release (not Uninstall Full) before installing the new PV430 SV201 release for all of the Specialty Planning and Specialty 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 PV430 SV201 release solutions.
- Many customers have multiple copies of some of these solutions installed in the same OneStream XF 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 (MST) solution helps to expedite this process, but the currently installed copies should be reviewed prior to attempting an upgrade.

New

- None

Changed

- None

Release PV430 SV200 for All Specialty Planning & Compliance Solutions

The theme of this release is incremental improvements and minor defect resolution to all of the Specialty Planning and Specialty Compliance solutions. Improvements include a Solution Audit feature and reporting enhancements. All of these solutions will now be documented in a common set of shared documents.

Release Date: 04/29/2019

Deployment

- Current users of the Specialty Planning and Specialty Compliance solutions should review this section of the Instructions document prior to upgrading: Appendix 6: Considerations for Upgrading Specialty Planning & Compliance Solutions.
- It is recommended to Uninstall UI for the previous release (not Uninstall Full) before installing the new PV430 SV200 release for all of the Specialty Planning and Specialty 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 PV430 SV200 release solutions.
- Many customers have multiple copies of some of these solutions installed in the same OneStream XF 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 (MST) solution helps to expedite this process, but the currently installed copies should be reviewed prior to attempting an upgrade.

New

- Added new Solution Audit feature for logging modifications to Register data, Allocations, Calculation Plans, and a defined set of other changes. Audit Dashboard reporting is provided to review Solution Audit changes. The audit reporting will reference the user's Point of View at the time spreadsheet data is imported and include a copy of the spreadsheet in the audit log. It is important to remember that spreadsheets can import data for multiple Points of View. Therefore, the attached spreadsheet file should be reviewed to analyze the detailed Points of View that may have been impacted by a spreadsheet import. (4791) (9421) (9968)
- Added new feature to relink Specialty Planning and Compliance objects and data to Workflow Profiles that have been renamed. (10272) (10299)

Changed

- Added Year Total column to the six Plan Reports. Added employee counts to the three Detail Plan Reports. (5301) (5415) (9959) (9961)
- The ControlCodeList2 Dashboard Parameter Component has been changed from a Member List Parameter Type to a Bound List Parameter Type to be consistent with the other ControlListCode# Parameters in the People Planning solution. (5413) (9960)
- People Planning Business Rule calculations now execute on the Data Management server by default instead of the General server. (5559) (9964)
- Updated the XXX_YYData Connector Business Rules (where XXX=Solution Code and YYY=Solution Name) to use the correct Solution Code for each solution in the reference to "StoredPlanConnectorProfile_PLPT". (5692)
- Updated sample Calculation Plan naming convention. (9526)
- People Planning solution user interface, reporting and related components have been updated to the latest OneStream MarketPlace solution standards. (9981)

Fixed

- Corrected column reference to PlanImpact.P1 (formerly PlanImpact.P1No) in some of the standard Planning reports. (5048)

- People Planning solution now prevents copying or replacing Register Data in a Certified or Locked Workflow. (5101) (9970) (9970)
- Corrected spelling issues identified in Business Rules. (5425) (8008) (9963) (9966)
- Updated PLP_ParamHelper Business Rule to handle problems generated when using invalid system characters in imported file name. (6228) (9965)
- Corrected issues with user names with invalid system characters preventing file uploads (6220) (6221) (6230) (6232) (6233)
- Corrected solutions template references for SFIInt for proper uploads. (7738)
- Corrected Business Rule issue with the Copy Register function generating errors in TCR PV430 SV100. (10756)

Release PV430 SV100/TCR PV430 SV100 References

The theme of this release for TCR is to improve Reporting Compliance to better support adjustments such as leasing contracts with new audit features. PV430 SV100 for the other Specialty Planning and Compliance solutions was not released on the XF MarketPlace.

Release Date: 12/06/2018

Deployment

- This solution supports overinstall of TCR release PV410 SV103 and prior releases. Note that any standard TCR 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.

New

- Added new Solution Audit feature for logging modifications to Register data, Allocations, Calculation Plans and a defined set of other changes. Audit Dashboard reporting is provided to review Solution Audit changes. The audit reporting will reference the user's Point of View at the time spreadsheet data is imported and include a copy of the spreadsheet in the audit log. It is important to remember that spreadsheets can import data for multiple Points of View. So, the attached spreadsheet file should be reviewed to analyze the detailed Points of View that may have been impacted by a spreadsheet import. (9421)

Changed

- XFW Reporting Compliance (TCR) Dashboard Profile Visibility Parameter is now set to Always. Reporting Compliance (TCR) Dashboard will now be displayed in OnePlace by default. (7543)
- Added StoredJournalConsMember_TCRT Parameter to this release. This literal Parameter is used to store the target Entity for a journal. (8009)

- Changed TCR Business Rule references from OSD_ParamHelper to TCR_ParamHelper. (8010)
- TCR solution user interface, reporting, and related components have been updated to the latest OneStream MarketPlace solution standards. (9258) (9606)

Fixed

- TCR_SolutionHelper Business Rule line 1242 GetAttributeValue function now pulls ScenarioType ID as a Parameter instead of Scenario ID. (7051)
- Updated TCR_SolutionHelper Business Rule to correct a compile issue. (7544)
- Updated the stored Custom Event Handler rule in the TCR .ZIP file. (7545)

Release PV410 SV103

The theme of this release is to improve Reporting Compliance to better support adjustments such as leasing contracts.

Release Date: 3/30/2018

New

- Added ability and option to Enable Journal Loading as opposed to loading adjustments through the OneStream Stage as imported data. Journals are generated within the currently selected Workflow Profile as unposted Journals which can be reviewed and approved before posting. (6172)

Changed

- Updated the existing Copy Register button to allow the user to copy a single Register item at a time, in this use case, copy a single instance of a contract. (6173)

Fixed

- The TCR file upload process creates folders on the user directory by OneStream XF user name. The folder naming convention has been enhanced to account for spaces and special characters that could exist in OneStream XF user names (6234).

Known Issues

- If using the Enable Journal Loading feature, the Workflow Profile property of Workflow Name used to incorporate the Workspace into the process must include a Task after Journal Input or the Workflow status will not update once posted and Workflow is completed. A Workflow Name such as Workspace, Journal Input, Process, Confirm will work as expected. This change is planned for the upcoming OneStream XF 4.3.1, upon which this will become the minimum Platform Version in order to use this feature without a Workflow Task after Journal Input. (6649)

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

Release PV410 SV102

The theme of this release is initial release.

Release Date: 10/23/2017

Deployment

- Initial commercial release