onestream

ESG Reporting and Planning Release Notes

PV9.0.0 SV200

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ESG Reporting and Planning Release PV9.0.0 SV200

The theme of this Minor release is enhancements and new features for ESG Reporting and Planning.

Highlights

- This release of ESG Reporting and Planning provides features and enhancements designed to accelerate implementation, streamline data management, and improve user experience. This release includes the integration of additional frameworks, full auditability for data entry, and external data integration through the OneStream workflow import process.

New Features

Integrations

- The Workflow Import page enables data to be imported into ESG Reporting and Planning through the OneStream workflow import process. (MP7-962)
- The Dynamic Dimensions page enables dynamic dimensions to be configured for both the dynamic cube and the workflow import process. (MP7-1381)

Frameworks

- You can import the following frameworks on the External Frameworks page: Global Reporting Initiative (GRI) and Sustainability Accounting Standards Board (SASB). (MP7-1340, MP7-1421)
- On the Internal Frameworks page you can download an Excel template and bulk import framework KPI data. (MP7-1416, MP7-1417)
- You can select reporting units in the Definitions Details pane for each KPI referenced by a definition to customize reporting units for each framework. (MP7-1351, MP7-1353, MP7-1355)

Audit

- The profile Audit tab on the Home page displays status update details for the selected profile. (MP7-1296)
- The data entry Audit tab enables you to view all data entries created, modified, and deleted in the selected profile. (MP7-1326. MP7-1328, MP7-1470)
- The Definitions, Emissions, and Utilities data entry slide-out panels have Audit tabs that enable you to view all changes made to the selected entry. (MP7-1297, MP7-1298, MP7-1299)

Miscellaneous

- On the Sites and Profiles Administration pages, you can download Excel templates and bulk import site and profile configurations. (MP7-1383, MP7-1389, MP7-1396, MP7-1397)

Enhancements

- Required attachments are checked when the profile is submitted, rather than when the data entry is saved. (MP7-1362, MP7-1363)
- All definitions, factors, and utilities that require data entry include a column in the grid indicating status and attachment requirements. (MP7-1377, MP7-1399)
- Data records associated with inactive or removed definitions remain visible in the profile. (MP7-1330)
- Data records associated with disabled or removed sites, factors, and factor groups remain visible in the profile. (MP7-1331, MP7-1336)
- The Name field is added to the Definition Details pane to simplify mapping external data to existing definitions. (MP7-1471)

Upgrade Information

- You can reinstall over the existing installation.

Compatibility

- This solution is compatible with OneStream Platform Version 9.0.0. OneStream recommends upgrading to the latest platform version.

Documentation

- The Help tab prompts a slide-out panel where you can access online help documentation. (MP7-1325)

Notes

- Data entered in previous releases of ESG Reporting and Planning is not recorded in the Audit tabs. (MP7-1297)
- After a full uninstall, if a dynamic cube already exists, the Dynamic Dimensions page displays the dynamic and inherited dimensions associated with the dynamic cube. (MP7-1369)

Contact Support

Contact OneStream Support by registering at:

Support - OneStream Software

ESG Reporting and Planning Release PV9.0.0 SV100

The theme of this Major release is new features, enhancements, and performance improvements for ESG Reporting and Planning.

Highlights

- This release of ESG Reporting and Planning provides features and enhancements designed to expedite the solution's implementation process, improve user experience, and increase performance and calculation accuracy. This release also provides improved data adaptability by enabling users to connect emissions data to cubes and definition data to dynamic cubes.

New Features

Integrations

- You can use the Integration page to connect your emissions data to a cube with a pre-configured Connector Data Source. (MP7-1049)
- You can use the Integrations page to connect your definition data to a pre-configured dynamic cube. On the Definitions page, you can use the Cube tab to configure dimension member properties for definitions being pulled into the dynamic cube. Definitions also have recommended Account Types set in the Cube tab to enable flow of definition data into the dynamic cube. (MP7-1092, MP7-1097, MP7-1137)

Global Options

- On the Global Options page, you can make factor selections for fiscal years by selecting to use factors from either the fiscal year's first calendar year or last calendar year. (MP7-1016)
- On the Global Options page, you can select which Scenario Type will be used to populate dimensional control lists. (MP7-1252)

Miscellaneous

- You can assign four control lists to definitions to provide additional dimensionality to data collection and reporting. (MP7-1013, MP7-1010)
- You can multiselect definitions on the Definitions page to modify the properties for multiple definitions at once. (MP7-1014, MP7-1157)
- On the Access page, you can download Excel templates and import access groups and group members. (MP7-1056, MP7-1058, MP7-1033)
- Users can view regulation guidance for specific definitions during data entry. (MP7-1067)

Enhancements

Performance Enhancements

- Calculation enhancements are made to improve performance when running a report and improve contract allocation for reverted profiles. (MP7-1011, MP7-1040, MP7-1025)
- Performance enhancements are made to the Factors page to improve loading time. (MP7-1012)

- The Factors page requires you to select search criteria before the factor page loads to improve loading time. (MP7-1030)

Definitions

- Multiple entries for a definition will aggregate on the report if the definition has a numeric input type and if there are no control lists, baseline years, or milestone years assigned to the definition. (MP7-1068)
- The text box for definitions with a narrative input type supports rich text formatting. This formatting is displayed on the report for narrative entries. (MP7-1022)
- For definitions with a Monetary unit type, the Unit field is read only when entering data. This prevents data from being entered in the wrong currency. (MP7-1090)

Miscellaneous

- On the Frameworks page, the Guidance available for framework KPIs is enhanced with rich text formatting, tables, and images. (MP7-1023)
- Switching between Workflow Profiles will not change the data entries displayed on the Home page if the Workflow Profiles have the same scenario, year, and month. (MP7-1152)
- When you run a report, residual factors are applied if a contract does not cover the full value, is expired, or does not exist. (MP7-1015)
- In the Attachments slide-out, only the View button displays if the profile is in the Submitted or Completed status.(MP7-984)
- The layout of the Factor Groups page is updated with tabs to improve user experience. (MP7-1253)

Upgrade Information

- You can reinstall over the existing installation.

Compatibility

- This solution is compatible with OneStream Platform Version 9.0.0.

Contact Support

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