



Line Item Modeling Release Notes

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Line Item Modeling Release

PV9.0.0 SV2.0.0

The theme for this Major release is enhancements, bug fixes, and solution acronym updates.

Highlights

- The PLN acronym has been updated to LIM across the solution to ensure consistent terminology in the user interface. The update is limited to naming and labeling only and does not introduce functional changes or impact existing configurations. (MP2-4174, MP2-4172, MP2-4175)

IMPORTANT: For the PV9.0.0 SV2.0.0 release, all business rule customizations that reference PLNXX need to be updated to LIMXX. Example, PLNb1 becomes LIMb1.

New Features

Security:

- Provided LIM Solution Administrator access to Setup Wizard and settings. (MP2-4177)
- Implemented audit log for Instance Manager dashboard. (MP2-4288)
- Auto-assigned Actions table based on LIM Solution Administrator setting during installation. (MP2-4280)

Drivers/Formulas:

- Register fields are available as a drop-down menu of substitution variables in the Cube Driver UI. (MP2-4185)

Enhancements

Miscellaneous:

- Utilized long-running timeout setting to avoid premature termination of jobs. (MP2-4300)
- Ensured workflow execution group is used for security when importing plan data to workflow. (MP2-4184)

Sorting/ordering/filtering capabilities:

- Added information icon to Register Definition table and control list table to support ordering functionality. (MP2-4331)
- Edit Register columns ordering logic via Register Definition. (MP2-2656)
- Enabled column sorting in the Register table. (MP2-4068)
- Added column sorting to the Register Stage Table (Add Data). (MP2-4246)

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- Improved ordering logic for control list values. (MP2-3568)
- Added sorting capability to the control list Dynamic Grid. (MP2-4301)
- Enabled column sorting, ordering, and filtering in the Plan data table. (MP2-4245)
- Added column sorting to the Plans table. (MP2-4179)
- Enabled column sorting in the Formula Dashboard table. (MP2-4180)

Register/Excel Add-In:

- Allowed editing of Register records in table views using Excel Add-In. (MP2-4296)

Configuration/Setup Wizard:

- Enabled return to the home page from within the Setup Wizard. (MP2-4176)
- Enabled mapping of invalid member IDs when importing configuration files. (MP2-4322)
- Added uninstall option to the Setup Wizard and home page. (MP2-3950)

Security:

- Introduced nested security features to Line Item Modeling ensuring consistent access control across the solution while reducing configuration and maintenance risk. (MP2-4319)

Drivers/Formulas:

- Enhanced Cube Driver performance for large member definitions. (MP2-4279)
- Allowed substitution variables for Cube Drivers in all dimensions. (MP2-4187)
- Added validation to prevent disabling all formulas containing accounts referenced by other formulas. (MP2-4290)
- Added validation to prevent deletion of all formulas containing accounts referenced by other formulas. (MP2-4277)

- Exposed Actuals in Scenario for formulas and plan criteria. (MP2-4188)
- Enhanced string functionality for the formula builder. (MP2-4074)

Fixed Issues

- All formulas can be disabled. (MP2-4287)
- Plans process successfully to workflows when the Entity display name does not match the Register field name. (MP2-4327)
- Users can calculate plans successfully after deleting formulas, as Register group selection excludes deleted or disabled formulas. (MP2-4310)
- Plan data for records not applicable to enabled formulas will not be part of a recalculated plan. (MP2-4295)
- A plan can calculate when formula only has a global driver block. (MP2-4274)
- Users can modify Register data when a large number of Register fields are assigned with Allow Updates. (MP2-4281)
- Plan calculations only reference Lookup Drivers that are used in formulas. (MP2-4364, MP2-4379)

Upgrade Information

If Line Item Modeling exists in your application and you want to load the latest version, follow the steps below as a OneStream Administrator:

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1. Navigate to the Line Item Modeling Installer dashboard.
2. Select **Uninstall Line Item Modeling Installer**.
3. Navigate to Solution Exchange.
4. Download the latest version available of Line Item Modeling.
5. Load the zip file to your OneStream application.

NOTE: This action will not override any instance previously installed regarding Workforce, Duration, or Fixed Term Planning.

Line Item Modeling instances can be upgraded directly through the Instance Manager, allowing OneStream administrators to selectively upgrade individual planning instances without impacting others. Please see important notes below prior to selecting an instance to upgrade.

IMPORTANT: Any custom changes to standard dashboards, reports, or business rules should be saved as renamed or copied objects, as future OneStream solution upgrades may overwrite standard objects and remove unsupported customizations.

IMPORTANT: For this release (PV9.0.0 SV2.0.0), all business rule customizations that reference PLNXX need to be updated to LIMXX. Example, PLNb1 becomes LIMb1.

Within the Instance Manager dashboard, select the target Line Item Modeling instance and select **Upgrade**.

The upgrade installs the latest Line Item Modeling version on the same instance and workspace, preserving all existing data, schemas, and business rules. Multiple Line Item Modeling instances and versions can remain active concurrently, enabling controlled and phased upgrades.

Compatibility

- Minimum Platform Version 9.0.0 is required.
- Minimum SQL Server 2017 is required.
- Requires SQL database compatibility level 140+.

IMPORTANT: People Planning and Thing Planning will continue to be supported for existing implementations up and until the sunset date of December 31, 2027. It is highly encouraged that customers upgrade their environments to the minimum Platform Version of 9.0.0 to implement Line Item Modeling in regard to Workforce, Fixed Term, or Duration Based planning initiatives. Installing Line Item Modeling will not impact current People and Thing Planning implementations. However, People Planning and Thing Planning will still be subject to the Support terms of December 31, 2027.

Documentation

- Added CSV file examples for the Register Definition, Register data, Control List, Global Drivers and Account documentation to clarify import formatting and usage.

Known Issues

- When you input a member definition which includes white space and select save on the Register Definition, an error may occur. To resolve this, remove any white space before the member definition. (MP2-4389)

- When Register Definition rows are added manually with the number data type, numeric values loaded through import may appear blank in the Register UI. To resolve this, load a CSV file for the initial import of Register Definition rows. After the initial import, rows can be manually added or removed using the Register Definition table controls. (MP2-4378)
- When importing a CSV file that contains commas within data values, the import may fail and display a “One or more required columns is missing data” dialog box. The issue is caused by file formatting rather than missing or required columns. (MP2-4356)
- In some environments, Direct Connect data pulls using the Line Item Modeling connector may display a “Not Enough Quota” dialog box during long-running operations, even though the data retrieval completes successfully. To help resolve this, allow the process to complete and avoid navigating away from the page during execution; reducing execution time where possible. (MP2-4367)

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)

Line Item Modeling Release

PV9.0.0 SV1.2.0

This is the initial release of Line Item Modeling.

Compatibility

- Minimum Platform Version 9.0.0 is required.
- Minimum SQL Server 2017 is required.

Known Issues

- When a user calculates a plan that uses a formula containing only a Global Driver, it results in an error during execution. To avoid this issue, add an additional operation to the formula. (MP2-4274)

Contact Support

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