

Sustainability Solution Release Notes

PV9.0.0 SV3.0.0

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Sustainability Solution Release PV9.0.0 SV3.0.0

The theme of this Minor release is enhancements and new features for Sustainability Solution.

Highlights

- ESG Reporting and Planning has been renamed to Sustainability Solution to more accurately reflect its expanded functionality. This release organizes the solution into extensions that can be enabled or disabled, so you can implement only the components your organization needs and configure a solution suited to your unique compliance and reporting requirements. You can also enter and report on data in both periodic and year-to-date formats, improving the accuracy of your emissions and compliance reporting. The solution UI is also refreshed to improve navigation and usability.

New Features

Extensions

- Customize Sustainability Solution to your unique compliance and reporting needs by enabling or disabling extensions, which are distinct feature areas within the solution. See "Extensions" in the *Sustainability Solution Guide*. (MP7-1882, MP7-2068)

  - **ESG Reporting Manager Extension**: enable this to access the pages for generating framework-aligned reports and managing external reporting definitions and KPIs. See "ESG Reporting Manager" in the *Sustainability Solution Guide*. (MP7-2070)
  - **Carbon Performance Manager Extension**: enable this to access the pages for calculating, tracking, and reducing your organization's carbon footprint across all emission scopes. See "Carbon Performance Manager" in the *Sustainability Solution Guide*. (MP7-2071)
  - **Data Collection Extension**: enable this to access the pages for building and managing the data-collection experience. See "Data Collection" in the *Sustainability Solution Guide*.
- The ESG Extensions page enables you to view, enable, and disable extensions. See "Extensions" in the *Sustainability Solution Guide*. (MP7-2068)

Year-to-Date

- The Input Basis property enables you to set definitions and factors to periodic or year-to-date. See "Definitions" and "Factor Groups" in the *Sustainability Solution Guide*. (MP7-1959, MP7-2039)
- The Default Input Basis Global Options setting enables you to set a default input basis for definitions and factors, accelerating implementation. See "Global Options" in the *Sustainability Solution Guide*. (MP7-2050)
- Definitions with a year-to-date input basis can be reported on using dynamic cube services. (MP7-1962)
- Definitions and emissions with a year-to-date input basis can be reported on using the Sustainability Solution native report. (MP7-2051, MP7-1961, MP7-2058)

- The Workflow Export exports Emissions data entered as YTD for reporting in Cube Views. (MP7-2055)
- Contracts support utility data entered as YTD, ensuring accurate values when profiles are submitted or reverted. See "Contracts" in the *Sustainability Solution Guide*. (MP7-2059, MP7-2066)
- The Calculations Review page displays emissions YTD values. (MP7-2052, MP7-2057)
- When entering definition, emission, and utility data, the Value field indicator displays the assigned input basis to clarify the reporting period. (MP7-2049, MP7-2056, MP7-1960, MP7-2048)

Miscellaneous

- You can grant users partial access to specific areas of the solution by configuring administrative permissions for each role on the Access page. See "Access" in the *Sustainability Solution Guide*. (MP7-2093)
- You can opt-out of contract usage during template and workflow data imports. (MP7-1920, MP7-1921)

Enhancements

User Experience

- UI enhancements are made across the solution to improve usability, clarity, and navigation. (MP7-1882, MP7-2077)
- The slide-out navigation menu is enhanced with collapsed and expanded states. When collapsed, icons display for all solution pages to enable easy navigation. (MP7-2067)

- On the Home page, the Profile filter tiles and the Profile status progression in the Workflow tab are updated to provide a consistent user experience. (MP7-2076)

Miscellaneous

- The Calculations Review page displays calculations for all factor data entries regardless of profile status. (MP7-2046)
- Performance improvements are made to the Factor and Sites pages to improve loading time. (MP7-2033, MP7-2167)
- On the Utilities data entry page, the sites drop-down menu is listed alphanumerically for easier navigation in large data sets.(MP7-2036)
- The Global Option property values are stored in a database and persist through an upgrade. (MP7-2044)

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 *Getting Started with Solutions Guide* provides general instructions to install and configure OneStream Solutions. It also includes the recommended display settings, package file name information, advice for solution database migration, and considerations for modifications to solutions.

See the *Getting Started with Solutions Guide*.

Contact Support

Contact OneStream Support by registering at:

Support - OneStream Software

ESG Reporting and Planning Release PV9.0.0 SV2.1.2

The theme of this Hotfix release is a bug fix for ESG Reporting and Planning.

Fixed Issue

- Users can access the Settings pages, and all API calls to retrieve the count of Available Factors per Factor Source complete successfully. Additional precautions were added to ensure API errors do not impact access to the Settings page. (MP7-2101)

Compatibility

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

Documentation

The *Getting Started with Solutions Guide* provides general instructions to install and configure OneStream Solutions. It also includes the recommended display settings, package file name information, advice for solution database migration, and considerations for modifications to solutions.

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ESG Reporting and Planning Release PV9.0.0 SV2.1.1

The theme of this Hotfix release is a bug fix for ESG Reporting and Planning.

Fixed Issues

- The upgrade process is corrected to source factor values from completed data entries, and calculation now automatically restores factor values. Upgraded environments will reflect the correct, non-zero factor values once the upgrade is complete. (MP7-1956)
- Custom internal Unit of Measure conversion ratios are correctly applied during data entry. (MP7-1967)

Compatibility

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

Documentation

The *Getting Started with Solutions Guide* provides general instructions to install and configure OneStream Solutions. It also includes the recommended display settings, package file name information, advice for solution database migration, and considerations for modifications to solutions.

See the *Getting Started with Solutions Guide*.

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ESG Reporting and Planning Release PV9.0.0 SV2.1.0

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 new features and enhancements designed to accelerate implementation while improving contract visibility, utility flexibility, and factor efficiency.

New Features

- You can import the Australian Sustainability Reporting Standards (ASRS) framework on the External Frameworks page. (MP7-1672)

Factors

- The Factor Sources page enables you to select the sources used to populate available factors on the External Factors page. This improves performance and factor relevancy. See Factor Sources. (MP7-1612)
- The Global Factors setting enables you to apply the factor to sites and profiles outside of the factor's defined region. See Factor Groups. (MP7-1711)

Contracts

- The Activity tab on the Contracts page enables you to view contract spend history by scenario, including value and balance changes. See Contracts. (MP7-1620)
- The Contract Type property is added to contracts enabling you to set a contract to a specified amount or to total consumption. See Contracts. (MP7-1621)
- The Advanced Contract Data Entry Global Option enables you to assign a user group that controls how contracts are applied at the data-entry level. See Global Options. (MP7-1622)

Sites and Utilities

- In the site details pane, the Utilities tab enables you to assign multiple suppliers to a site and to edit market-based factor assignments. See Sites. (MP7-1735, MP7-1733)
- Control lists can be added to sites in the Utilities tab. See Sites. (MP7-1734, MP7-1738)

Enhancements

- UI enhancements are made to support windowed screen sizes and ensure all content remains visible and accessible across devices. (MP7-1595)
- Performance improvements are made to the workflow import functionality. (MP7-1600)
- Site and profiles cannot be deleted if they have one or more associated data entries. (MP7-1739)
- In Integrations > Dynamic Cubes, the Refresh Frequency setting and the Refresh Cube Data button refresh both dynamic dimension data and dynamic cube data. (MP7-1760)
- Enhancements are made to the ESG Reporting and Planning report to support reporting units for comparative periods and rolling up definition values. (MP7-1763, MP7-1770)

Contracts

- The Contracts page is moved to the Administration tab. (MP7-1617)
- Contract validations restrict deletion and specific property updates when a contract has associated spend transactions, ensuring contract details remain consistent. (MP7-1618)
- Contracts are calculated when a profile is submitted. (MP7-1619)
- The Calculations page only displays data from submitted and completed profiles to provide contract allocation visibility. (MP7-1713)

Sites and Utilities

- The Sites page is enhanced with a details pane and tabbed layout to streamline site configuration and factor group assignment. (MP7-1693)
- The Utilities data entry page displays all utilities assigned to the selected site. See Utilities Data. (MP7-1738)

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.

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ESG Reporting and Planning Release PV9.0.0 SV2.0.0

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)

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ESG Reporting and Planning Release PV9.0.0 SV1.0.0

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.

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