

Line Item Modeling Release Notes

PV9.0.0 SV4.1.0

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Table of Contents

Line Item Modeling Release PV9.0.0 SV4.1.0 1

Enhancements 1

Fixed Issues 2

Compatibility 2

Contact Support 3

Line Item Modeling Release PV9.0.0 SV4.0.0 4

Enhancements 4

Fixed Issues 5

Upgrade Information 5

Compatibility 6

Contact Support 6

Line Item Modeling Release PV9.0.0 SV3.0.0 7

Enhancements 7

Fixed Issues 9

Compatibility 9

Contact Support 9

Line Item Modeling Release PV9.0.0 SV2.0.1 10

Fixed Issues 10

Upgrade Information 11

Compatibility 12

Known Issues 13

Contact Support 14

Line Item Modeling Release PV9.0.0 SV2.0.0 15

Highlights 15

New Features 16

Enhancements 16

Fixed Issues 18

Upgrade Information 18

Compatibility 20

Documentation 20

Known Issues 21

Contact Support 21

Line Item Modeling Release PV9.0.0 SV1.2.0 22

Compatibility 22

Known Issues 22

Contact Support 22

Line Item Modeling Release PV9.0.0 SV4.1.0

The theme of this release is bug fixes, validations in the Excel Add-In and reliable plan calculations.

Enhancements

- Plan recalculation runs reliably for users with restricted Register access, so you can recalculate plans without interruption regardless of your access level. (MP2-4920)
- In the Line Item Modeling Excel Add-In, you can now catch and correct errors before submitting your data. The Register table in the Excel Add-In has a Validation column next to Invalid Column which explains why a row couldn't be saved. You can also add custom row validations to block a save when a row is invalid. (MP2-4969)

  > **IMPORTANT:** Validation and Invalid Column are now reserved column names. If a Register field is named Validation or Invalid Column, rename it prior to upgrading your instance. The installer will stop the upgrade and list any conflicting fields if that task isn't completed prior to.

  > **NOTE:** If you customized the CustomEventHandler_LIM, your changes are not updated automatically during an upgrade.

  To show your own checks in the Validation column and block the save when they fail:

1. Download the updated CustomServiceFactory_LIM.zip.
2. Copy the new customRowValidation function into your version.
3. Add customRowValidation as the last argument of the SaveTableView call.
4. Move your row-level checks into customRowValidation. Return a message to fail the row or an empty string to pass the row.

Fixed Issues

- Users only see the Register columns they have access to, including columns for fields that contain a member definition. (MP2-4962)
- View Register columns with a number data type as numbers in the Excel Add-In. (MP2-4966)
- Use Manage Filters with the OR condition and see data restricted consistently according to your security access. (MP2-4928)
- Added an Invalid column to flag data issues and ensure Excel Add-In changes save correctly to the Register. (MP2-4929)
- Use the Excel Add-In with dates that parse consistently when your local Excel uses a non-US culture. (MP2-4965)

Compatibility

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

Contact Support

Contact OneStream Support by registering at:

Support - OneStream Software

Line Item Modeling Release PV9.0.0 SV4.0.0

The theme of this release is performance enhancements and bug fixes.

Enhancements

- Enhanced Cube Driver processing delivers faster, more scalable plan calculations with consistent results across large datasets. (MP2-4630)
- Improved plan recalculation performance by enabling independent formulas to execute concurrently. (MP2-4687)
- Accelerated plan calculations by optimizing Cube Driver processing based on user write access. (MP2-4840)
- Improved collaboration by allowing authorized users with independent write access to calculate the same plan concurrently, reducing wait times and increasing productivity. (MP2-4851)
- Enhanced calculation engine performance by processing plan recalculations across multiple threads. (MP2-4643)
- Run high-volume Line Item Modeling calculations with improved reliability through enhanced calculation governance, extended processing time limits, and clearer guidance when system capacity is reached. (MP2-4860)

> **NOTE:** The default maximum number of concurrent calculations has been adjusted to optimize system performance. The default number of concurrent calculations is set to 8 within Line Item Modeling. If modifications are required, reach out to OneStream Support for assistance.

Fixed Issues

- Calculate plans that leverage high volume Cube Drivers. (MP2-4834)
- Update Register Definitions for plans with large data volumes, while maintaining validations. (MP2-4858)
- Reliably view all Register data available to you, with improved consistency across users and sessions without cache clearing or other workarounds. (MP2-4734)
- Calculate plans with custom write security assignments. (MP2-4702)
- Save Cube Drivers only after defining criteria and generating preview data. (MP2-4692)
- View and copy plans with start periods M10, M11, and M12 without the period resetting during editing. (MP2-4671)
- Solution version displays in dot-separated format for consistency with other Marketplace solutions. For example, PV9.0.0 SV4.0.0. (MP2-4689)

Upgrade Information

Upgrade Information remains the same as prior releases.

Compatibility

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

Contact Support

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Line Item Modeling Release PV9.0.0 SV3.0.0

The theme of this release is enhancements and performance.

Enhancements

- Quickly access the data you need with improved performance on secured register columns. Experience faster, more reliable results when working with large, complex datasets, ensuring a smoother, more responsive workflow at scale. (MP2-4586)
- Achieve faster load and recalculation times for large datasets without impacting plan results through plan tables that support partitioning by plan ID. Additionally, to prevent disruption, plan compression runs as a data management job when plans are locked or unlocked, enabling you to continue working uninterrupted. (MP2-4544)
- Deleting calculated plans is now faster, significantly reducing wait times. This improvement enables you to manage plans more efficiently. (MP2-4634)
- Validate Cube driver data faster with greater confidence. Improvements to Cube driver member script generation and data preview performance handle large datasets more efficiently while maintaining accurate Preview table results. (MP2-4625)
- Quickly calculate plans with improved performance by reusing a single database connection across the pipeline, eliminating repeated connections. (MP2-4621)

- Run upgrades in the background without interrupting your work. View real-time progress so you always stay updated. This ensures large data migrations run smoothly without blocking access to the application. (MP2-4632)
- Upgrade to the latest version to automatically gain faster performance without extra setup or changes to your existing data. (MP2-4597)
- Upgrade existing instances without extra setup while maintaining plan performance improvements and consistent results. (MP2-4545)
- Streamline upgrades by automatically preserving and applying Register and member indexing, eliminating the need for additional configuration while ensuring existing functionality remains. (MP2-4587)
- Run ID and PlanID can no longer be used in column names. These words are reserved for internal use across fields, formulas, and drivers, including upgrade validation checks to prevent duplicate or conflicting column IDs. (MP2-4622)
- Lock and unlock plans without impacting performance while data is automatically compressed and decompressed in the background to optimize storage. Helpful status messages keep you informed during processing, and plan behavior remains unchanged. (MP2-4616)
- Replace all Register data and recalculate plans while maintaining consistent performance, accurate plan results, and security-compliant calculations. (MP2-4598)
- Push large volumes of plan data to the cube faster while ensuring data source settings for suppressing zeros are applied consistently and accurately. (MP2-4595)
- Load and navigate plans faster with improved performance and caching for large data sets. (MP2-4665)

Fixed Issues

- Users without access to security-controlled columns are now prevented from entering or saving unauthorized values with validation messages and no data saved or hidden. (MP2-4594)
- When creating a new Cube Driver, the Save button appears only after required criteria are populated and data is available in the preview table. (MP2-4686)
- Plans calculate successfully with any write security group assignment, eliminating timeouts and ensuring calculations complete reliably. (MP2-4701)

Compatibility

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

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Line Item Modeling Release PV9.0.0 SV2.0.1

The theme of this Hotfix release is bug fixes.

Fixed Issues

- Register filters function the same in the Register as they do in the Manage Filters pane, ensuring saved filter logic is applied correctly and calculations only use the filtered records. (MP2-4430)
- When processing a Plan to a Cube, only data allowed by Entity security is included. (MP2-4502)
- Plan calculation results that span multiple pages display correctly in the Plan page, with any null values handled and shown as 0. (MP2-4499)
- Plan calculations complete without errors by correctly handling temporary Cube Driver tables from other instances. (MP2-4487)
- Register data remains visible in the UI after adding a new Register field with control list values, ensuring existing rows are not hidden when the new control list column is initially blank. (MP2-4431)
- Manually added Register values are not duplicated when the Register bulk import validation detects duplicates. (MP2-4402)
- Register filters that include nested columns with display names that are different from the underlying column names save and update successfully. (MP2-4164)

- Register CSV imports correctly handle comma-delimited values wrapped in quotes, allowing data such as numeric and string ranges to be imported. (MP2-4356)
- Number data type fields in the Register display correctly when rows are added manually. (MP2-4378)
- Global checkboxes display for Flow dimensions that have a Member Definition assigned to it in the Register Definition. (MP2-4522)

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:

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:** If you are upgrading from SV1.2.0 to SV2.0.1, all business rule customizations that reference PLNXX need to be updated to LIMXX. Example, PLNb1 becomes LIMb1. If you are upgrading from SV2.0.0 to SV2.0.1, confirm all business rule customizations have been updated to reference LIMXX.

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. However, the WorkforcePlanningImportRegisterConnector business rule will be overwritten during an upgrade. This connector is customizable based on the resource you will need to connect your workforce data if it's coming from another source system. Ensure this is saved elsewhere prior to upgrading your instance to ensure its not overwritten. 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+.

> **NOTE:** Line Item Modeling PV9.0.0 SV2.0.1 is compatible with Platform Version 9.4, but OneStream highly recommends adopting the latest version of Line Item Modeling to realize performance, scale, and stability enhancements.

Known Issues

- Look-up values in Excel Table View use inconsistent delimiters based on the user's culture code, causing incorrect formatting for non–en-US users. (MP2-4580). This is related to another bug (PF8-3327).
- If a user lacks access to an entity's Display Member Group, the Line Item Modeling entity selector will not load and becomes a free-form field without validation, allowing unrestricted data entry and visibility. Set the entity Display Member Group to Everyone or a group that includes all Line Item Modeling users to ensure the drop-down menu renders correctly. (MP2-4594)
- Register rows disappear after saving with no error message, even though the data is written to the SQL tables and captured in the audit log, because users without the required access can manually enter data that the Register does not display. Add the user to an Entity Write and Read access security group to ensure the values display correctly. (MP2-4578)
- Formulas that reference Cube Drivers in Line Item Modeling can cause performance issues when evaluated across undetermined dimensions resulting in long execution times. For example, the Global checkbox enabled with a blank Entity. (MP2-4585)
- In the Excel Add-In, Register values do not refresh for some users, causing cached values to display instead of current data. (MP2-4579)

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Line Item Modeling Release PV9.0.0 SV2.0.0

The theme of 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)

- 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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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+.

NOTE: Line Item Modeling PV9.0.0 SV2.0.0 is compatible with Platform Version 9.4, but OneStream highly recommends adopting the latest version of Line Item Modeling to realize performance, scale, and stability enhancements.

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

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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.

> **NOTE:** Line Item Modeling PV9.0.0 SV1.2.0 is compatible with Platform Version 9.4, but OneStream highly recommends adopting the latest version of Line Item Modeling to realize performance, scale, and stability enhancements.

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)

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