



ESG Reporting and Planning Release Notes

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Release Notes PV8.4.0 SV110

The theme of this minor release is enhancements and new features for ESG Reporting and Planning. This solution is compatible with OneStream Platform Release 8.4.

Highlights

- This release of ESG Reporting and Planning enables you to set up baseline year, prior year, and milestone year data. You can link this data to definitions, and the data will display with variance calculations during data entry and on the framework report. You can also bulk import data on the Home page for definitions, emissions, and utilities.

New Features

Prior, Baseline, and Milestone Year Reporting

- You can set up Prior year, Baseline year, Milestone years, and Milestone Scenarios on the Global Options page and use the Definitions page to link them to definitions. Set up these options to enable a baseline or historic point of reference and milestone variance reporting. (MP7-779, MP7-901, MP7-865)
- The Prior year, Baseline year, Milestone years, and variances will display in the data entry grid for linked definitions, so that you can view variance calculations and points of reference during data entry. (MP7-778, MP7-907)

- When you are reporting Scope 1-3 data for Emissions in the ESRS framework, additional columns for Baseline Year, Prior Year, Milestone Year, and variance calculations will display on the report if those options are selected. (MP7-596)

Home Page and Data Entry

- You can download a data entry template and bulk import data for definitions, emissions, and utilities to streamline the data entry process. (MP7-482, MP7-548, MP7-843)
- The Calculate button on the Home page enables Administrators to run carbon calculations at any given time and view results to gauge performance. (MP7-777)
- Preparers or Administrators can delete data entries from the Definitions, Emissions, and Utilities tabs on the Home page. (MP7-815)

Frameworks

- The Frameworks page displays a tree view of the framework's hierarchy, providing a view of the structure. You can use the tree view to filter KPIs in the Frameworks grid. (MP7-884)
- On the Frameworks page, you can use the Info icon to view additional guidance for parent KPIs in the framework tree view. (MP7-886)

Internal Factors

- You can assign internal factors to sites as electric grids or heat and steam sources. (MP7-899, MP7-955)
- You can select a region for custom internal factors, which helps you find factors when assigning utility suppliers to sites. (MP7-684)

Enhancements

- The Control Lists grid displays ESGeo provided external control lists and control list members. (MP7-866)
- Disabled profiles with a Completed status display in the grid on the Home page. (MP7-845)
- The Assigned Factors grid displays the LCA Activity and Scope ID to enable easy viewing of these properties. Use the edit icon to update these Properties in a slide-out. (MP7-427, MP7-880)
- On the Frameworks page, the Frameworks grid has a Guidance column indicating which KPIs have additional guidance. (MP7-783)
- Custom definition cannot be deleted if they are assigned to a profile, marked as active, or have data entered for them. (MP7-589)
- You can change suppliers for a site and either move the data from the previous supplier to the new supplier, or you can display both suppliers on the Home page for data entry. (MP7-921)

Known Issues

- Contract use is allocated when a user runs a report on a related entity. If the user reverts a profile with a contract that has already been allocated, the contract allocation is still associated with the report, resulting in a reduced remaining contract value. To return the contract value, users need to revert the profile and delete related utilities entries.

Upgrade Information

- When you upgrade from PV8.4.0 SV100 to PV8.4.0 SV110, there are database changes to the Unit of Measure table. Perform this upgrade to use precise conversion rates. (MP7-864, MP7-972, MP7-982)
- When you upgrade from PV8.4.0 SV100 to PV8.4.0 SV110, there are database modifications linking all definitions to one ESRS framework KPI to ensure accurate data collection. For all definitions previously linked to more than one ESRS framework KPI, upgrading marks these definitions as Internal to avoid modifying any existing data entered for these definitions. If you do a new install, these definitions are split out with Parent KPI context and duplicate KPI mappings are removed. (MP7-908)
- You can reinstall over the existing installation.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)

Release Notes PV8.4.0 SV100

This is the initial release of ESG Reporting and Planning and documentation for installation guidance.

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