

## Release Summary

This release reduces manual work and speeds execution with Plan Automations, upgraded notification flexibility, and simpler bulk updates (export/edit/import). Portfolio and reporting clarity improve through shareable Personal Views, Modeler commitments/dependencies, expanded Timesheet/Resource dashboards, and stronger financial capabilities (categorized timesheet actuals, revenue imports, time phased revenue rates, and configurable financial rollups). Day-to-day experience is smoother with work item file management, clearer status updates, easier admin controls (areas/time off), a core framework visual refresh, and multiple integration and platform upgrades (AI, Teams, OData, Project calendar sync, and connector infrastructure).

## Features

### Portfolio Plan

**Summary:** Plan Automations help plan managers and administrators reduce repetitive work by automating common plan actions based on key triggers, supporting more consistent execution, better governance, and faster turnaround on routine updates. Personal List Views can now be shared with specific users and teams, helping large organizations standardize visibility and collaboration without forcing everyone into a single global view, or managing a large list of global views.

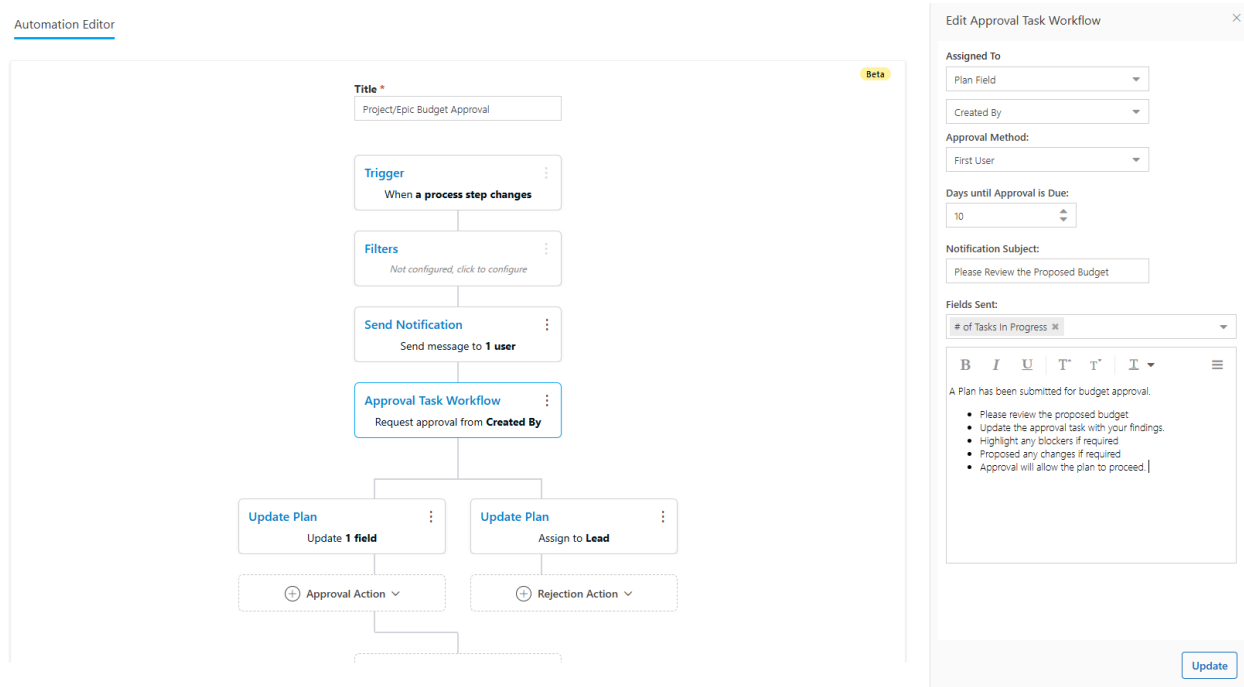
#### Plan Automations (Beta):

- **Triggers:** Run automations when a process step changes, a date passes, a field changes, or when a plan is created.
- **Actions:** Update plan fields, share with plan permissions, send email notifications, start approval workflows, reorganize plans, and copy/create new plans.
- **Action Combination:** Combine multiple actions in sequence within a single automation to meet business needs.
- **Example:** When a **plan process step** changes to **Approved**, automatically **create a new plan, shared with the right people, populate key details**, and **notify all stakeholders**, reducing hand offs and ensuring work starts immediately with consistent setup.

#### Share Personal Portfolio List Views:



- **Share with Users or Teams:** Distribute a Personal View to the right audience to align on the same perspective quickly.
- **Email Notifications with Direct Links:** Recipients get an email notification that includes a link to open the shared view immediately, reducing friction and speeding adoption.
- **Owned and Continuously Updatable:** Shared views remain owned by the publisher and can be updated over time, ensuring recipients always have the latest version without re-sharing.



## Plan Details

**Summary:** Financial Rollups introduce a new calculation option for plan fields that automatically totals Financial Plan data into meaningful, business-ready metrics, removing the need for customizations or external reporting and making it easier to report consistent totals at both the plan and portfolio level.

- **Configurable Rollup Totals:** Create calculated plan fields that total Financial Plan data automatically for consistent, reusable reporting.
- **Flexible Filtering Options:** Rollups can be scoped using **date ranges**, **custom financial plan fields**, and **cost categories** to match how the business reports.
- **Portfolio-Ready Metrics:** Rollup results can be used directly in plan details and portfolio views to support executive reporting and decision-making.



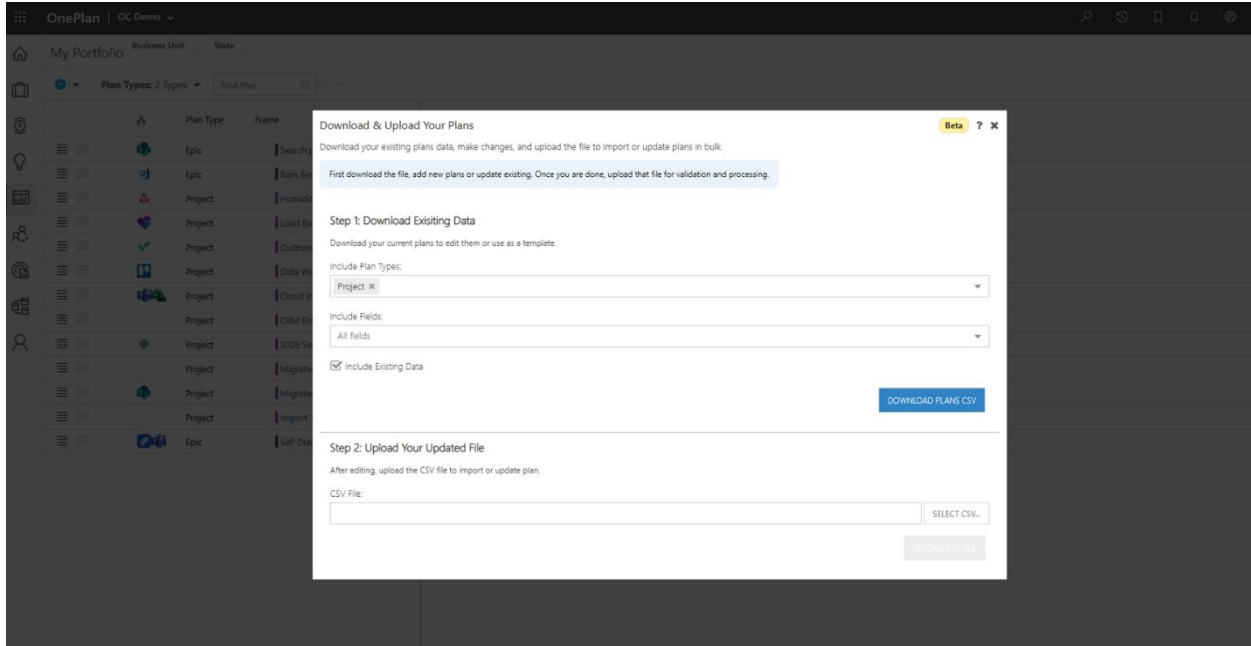
The screenshot displays the OnePlan interface for a project named "Data Warehouse Migration Demo Jan...". The project is currently in the "Planning" phase, as indicated by the progress bar at the top. The interface includes a sidebar with navigation icons and a main content area with several sections: Project Information, Commitments, Project Business Case, Project Prioritization, Project Schedule, and Project Financials. The Project Financials section is expanded, showing a table of financial data.

Financial Plan		Benefits:	\$400,000.00	Estimated Cost:	\$133,952.50
Budget:	\$10,800.00	ROI:	3,604%	Actual Labor Cost:	0
Forecast:	\$173,542.50	Funding Available:	<input checked="" type="checkbox"/>	Remaining Labor Cost:	\$132,952.50
Actuals:	\$173,542.50	Funding Source:	Software Budget	Project Actual Capex:	\$4,333.00
Remaining Budget:	-\$162,742.50	Current Fiscal Year Forecast:	\$173,542.50	Project Labor Budget:	\$10,800.00
Budget Variance:	-\$162,742.50				

## Import and Bulk Edit Plans

**Summary:** OnePlan now supports importing and bulk editing plans using comma separated values (CSV) files. Users can download plan data, select the plan types and fields they want to work with, make changes offline, and upload the file for processing. The import supports creating new plans and updating existing ones, with validation of field types and data before changes are applied.

- **Import of Plan Data from Files:** Using CSV file users can upload data sourced from other systems, making it easier than ever to add data for a new business unit, department or team to an existing OnePlan group.
- **Bulk Editing Existing Plans Using Files:** Offline bulk editing of plan level data in a csv file simplifies plan level data updates in OnePlan.



## Portfolio Modeler

**Summary:** Scenario Commitments make it easier to finalize decisions by allowing selected scenarios to be “committed” once stakeholders align, turning approved modeling outcomes into an actionable baseline for execution and reporting. The Dependency column has been added for clearer visibility into how plans are connected, helping teams understand downstream impacts and make better sequencing and prioritization decisions during scenario planning.

### Scenario Commitments:

- **Commit Scenarios with Confidence:** Lock in the chosen scenario once decisions are made, reducing back-and-forth and uncertainty.
- **Operationalize Decisions:** Committed scenario results become available for downstream use in plans and portfolio views, keeping execution aligned to what was approved.
- **Faster Transition to Delivery:** Helps teams move from modeling to action without manual reconciliation or rework.

### Plan Dependencies:

- **See Cross-Plan Impacts:** View dependencies directly while evaluating scenarios to understand what work is connected.
- **Improve Sequencing Decisions:** Make it easier to plan realistic roadmaps by considering what must happen first.



NAME	PROPOSED		COMMITTED				
	STATUS	START	STATUS	START	MODEL	ON	BY
Data Integration for Predictive Maintena...	OUT	06/16/2026	IN	06/16/2026	2026 Project Planni...	03/22/2026	TRENTON TANNER
Concept Development	OUT	04/07/2026	IN	04/07/2026	2026 Project Planni...	03/22/2026	TRENTON TANNER
Content Marketing	OUT	03/11/2026	IN	03/11/2026	2026 Project Planni...	03/22/2026	TRENTON TANNER
Paperless Onboarding Workflow	OUT		IN		2026 Project Planni...	03/22/2026	TRENTON TANNER
Status Reports	OUT		IN		2026 Project Planni...	03/22/2026	TRENTON TANNER
Multiplier	IN		OUT		2026 Project Planni...	03/22/2026	TRENTON TANNER

## Financial Plan

**Summary:** Timesheet actual costs can now be **categorized** during import using the cost categorization structure configured for the Financial Plan, improving accuracy, consistency, and downstream reporting without manual rework. Financial Plans can now import **revenue** from internal planning sources, giving organizations a clearer, more complete picture of financial performance by bringing revenue and cost tracking together with less manual effort.

### Timesheet Cost Categorization:

- **Category-Aware Costs:** Imported timesheet costs automatically land in the right financial categories based on your configuration (ex: Capex/Opex).
- **Cleaner Reporting:** Improves consistency for budget vs. actual reporting by ensuring actuals follow the same categorization rules as planning data.
- **Less Manual Effort:** Reduces the need to recode or adjust costs after import, saving time for finance and PMO teams.

### Revenue Imports:

- **Revenue from Multiple Sources:** Import revenue from Resource Plans, Work Plans, and Timesheets to improve end-to-end financial visibility.
- **Blended Revenue Support:** Define blended revenue rates using labor categories to standardize forecasting and reporting.



- **Actual Revenue Support:** Capture actual revenue rates per assigned resource (or at the plan level) to reflect real-world billing structures.
- **Better Forecasting and Tracking:** Reduce spreadsheets and manual adjustments by keeping revenue calculations aligned to the work being planned and performed.

### Resource Actual Revenue Rate Tables:

- **Time Phased Revenue Rates:** Define revenue rates by effective date so rate changes are reflected automatically over time.
- **Improves Revenue Consistency:** Keeps revenue calculations aligned across planning and actuals as rates evolve.

Cost Category	Description	Totals		Mar 2026		Apr 2026		May 2026		Jun 2026		
		Forecasted ...	Actual R...	I R...	Forecast...	Actual R...	Forecast...	Actual R...	Forecast...	Actual R...	Forecast...	Actual R...
Plan Total		173,542.50	173,542.50	5,240.00	28,330.00	28,330.00	20,077.50	20,077.50	21,992.50	21,992.50	33,432.50	33,43
Labor		173,542.50	173,542.50	5,240.00	28,330.00	28,330.00	20,077.50	20,077.50	21,992.50	21,992.50	33,432.50	33,43
Business Analyst		71,780.00	71,780.00	1,480.00			11,100.00	11,100.00			28,120.00	28,12
Developer		77,900.00	77,900.00	7,410.00	24,130.00	24,130.00	8,977.50	8,977.50	21,992.50	21,992.50		
Engineer		3,125.00	3,125.00								3,125.00	3,12
Facilities Manager		0.00	0.00									
Logistics Manager		0.00	0.00									
Marketing Specialist		0.00	0.00									
Project Manager		20,737.50	20,737.50	7,350.00	4,200.00	4,200.00					2,187.50	2,18
Social Media Manager		0.00	0.00									
System Administrator		0.00	0.00									
Tester		0.00	0.00									
Trainer		0.00	0.00									
UI/UX Designer		0.00	0.00									

## Work Plan

**Summary:** Work items can now include file links and attached documents directly where work happens, making it easier for teams to find deliverables, reduce hunting across systems, and keep execution aligned with the right artifacts. Status updates are now clearer and more actionable by presenting all key status fields in one place and adding more context about the work, helping assigned users understand what’s needed and update progress with confidence. Work Plan notifications are now managed as automations, giving teams more flexibility to tailor how and when notifications run, while preserving existing behavior through automatic promotion

### Work Item Files:

- **Attach Files to Work Items:** Add file links or documents directly to a work item from My Work, Status Updates, and Timesheets.



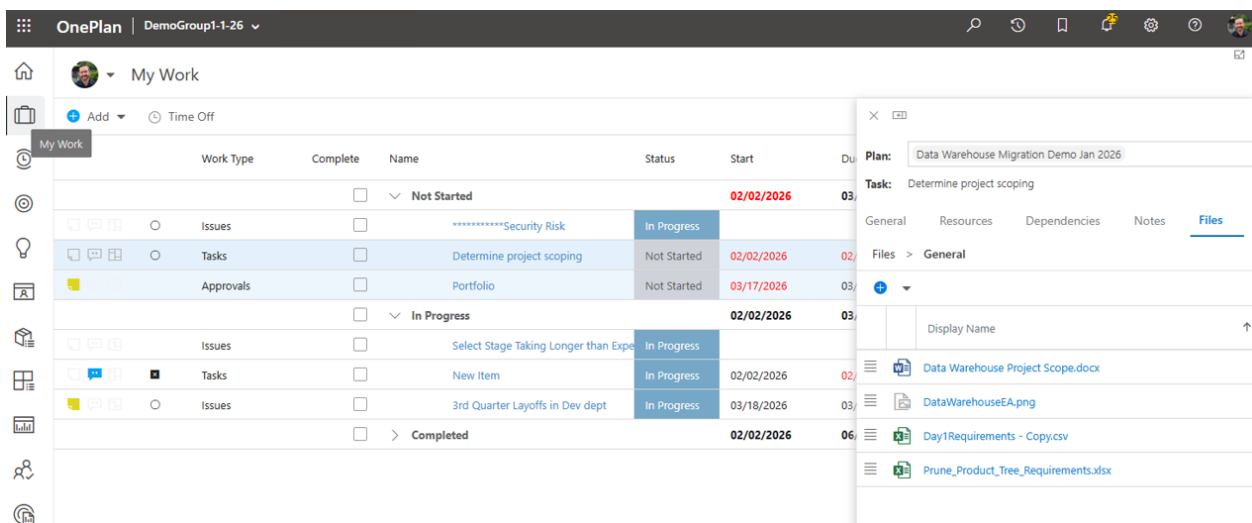
- **Keep Deliverables Organized:** Each file/link stays connected to the specific work item for clearer traceability and accountability.
- **Centralized Storage:** Work item files are stored and accessible through the plan's Files app, reducing duplication and confusion.
- **Faster Collaboration:** Team members can quickly open the right document from the context of the work item, improving handoffs and follow-through.

### Work Item Status Updates:

- **Clearer Status Entry:** All status fields are presented together and clearly labeled in the work item details, reducing confusion and missed updates.
- **More Context While Updating:** Work items now display assigned resources and dependencies in My Work, Status Updates and Timesheets so users can understand ownership and blockers before submitting updates.
- **Better Follow-Through:** Improved visibility helps teams provide more accurate updates and improves stakeholder confidence in reported progress.

### Work Plan Notification Upgrade:

- **Automatic Promotion:** Existing Work Plan notifications are automatically converted and available under **Automations**, so nothing is lost.
- **More Flexibility:** Notifications can now be expanded and enhanced using automation capabilities to better match business needs.
- **Centralized Management:** Manage notifications alongside other automations for a more consistent experience.





## Timesheets

**Summary:** Timesheet Dashboards are now available for both global and personal use, giving users faster visibility into time tracking trends, compliance, and workload patterns, without needing external reporting. Daily timesheet entry is now less intrusive and easier to complete, helping users capture time and supplemental details more comfortably. Searching for and adding work items from timesheets is now faster and more responsive, helping users complete time entry with less waiting and fewer interruptions.

### Dashboards:

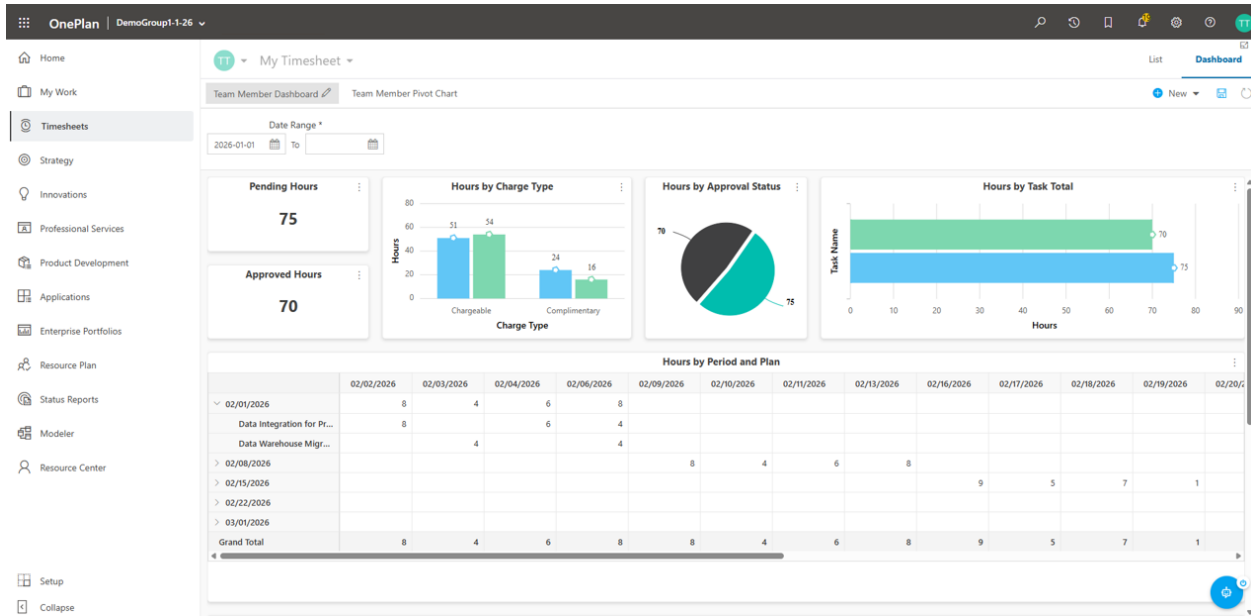
- **Global and Personal Dashboards:** Provide consistent reporting across the organization while still allowing individuals to track their own time insights.
- **Review Any Time Period (including locked):** Analyze past periods, even when locked, to support audits, trend analysis, and planning.
- **Approver and Delegate Visibility:** Approvers and delegates can review dashboard insights for the users they support (based on their approval/delegation user access), making it easier to manage reviews and follow-ups.

### Timesheet UI/UX:

- **Less Disruptive Entry Experience:** Daily input and supplemental fields are presented in a smoother, more user-friendly way.

### Timesheet Performance:

- **Faster Search and Add:** Improved performance when finding and adding work items, reducing time spent on administrative steps.



## Resource Plan

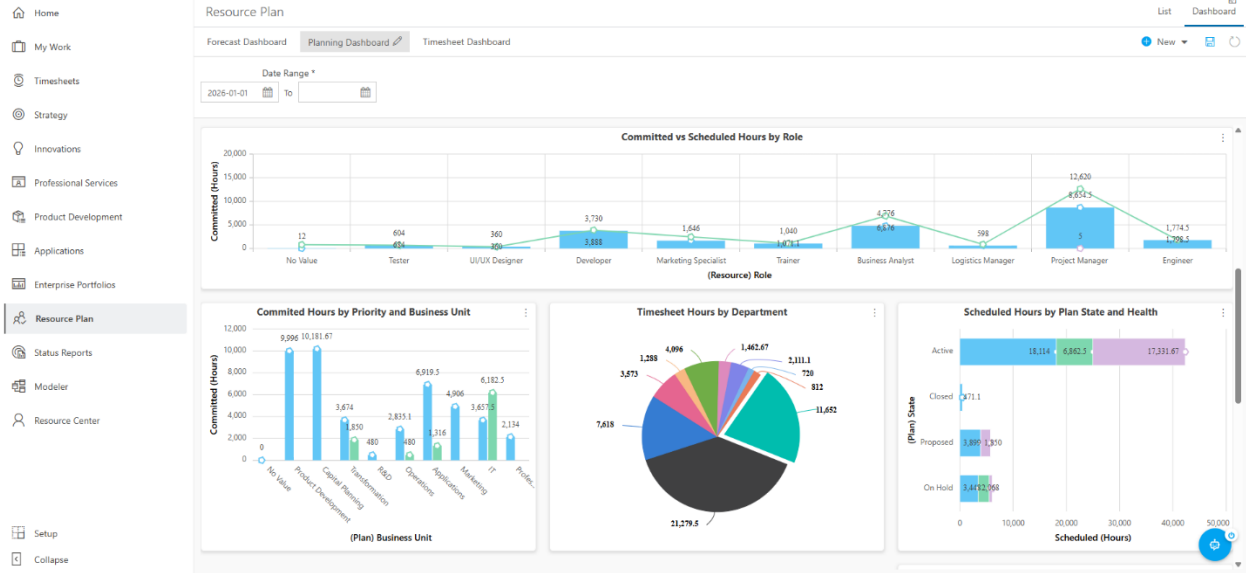
**Summary:** Resource Plan Dashboards are now available for both global and personal use within the Global Resource Plan, providing faster visibility into capacity, allocation, and coverage, so teams can make staffing decisions with clearer insight and less external reporting. The Resource Plan toolbar has been refreshed with an updated look and feel, making common actions easier to find and use while improving consistency across the experience.

### Dashboards:

- **Global and Personal Dashboards:** Standardize resource visibility across teams while still supporting personal views for day-to-day planning.
- **Charts:** Use charts to quickly visualize, filter, and analyze resource plan data to spot trends and gaps.

### Improved Toolbar:

- **Cleaner, More Consistent Toolbar:** Modernized design improves readability and reduces visual clutter.
- **Improved Usability:** A more intuitive and consistent layout reduces clicks and confusion for both new and experienced users.



## Sofia AI Assistant Upgrade to GPT 5.2

**Summary:** Sofia AI, OnePlan’s built-in AI assistant, has been upgraded to support Azure OpenAI GPT 5.2, providing a stronger foundation for smarter and more capable AI experiences across the platform.

- **Azure OpenAI GPT 5.2:** More accurate responses when interacting with Sofia AI, improved understanding of complex questions and planning scenarios.
- **Handles larger inputs:** Sofia can now process **up to 2x more data** in a single request, enabling richer analysis and better answers.

## Comments

**Summary:** Comments can now be edited, making collaboration more accurate and reducing follow-up noise when details change or mistakes need correction. Email notifications for comment replies now include the full reply thread context, helping recipients understand the conversation quickly and respond with better clarity, without needing to click back and forth to find background.

### Comment Editing:

- **Edit for Accuracy:** Comment authors can correct typos or clarify details without needing a new comment thread.
- **Admin Control:** Administrators can edit comments when needed to support governance and maintain quality.
- **Cleaner Collaboration History:** Keeps discussions readable and reduces confusion caused by outdated or incorrect information.



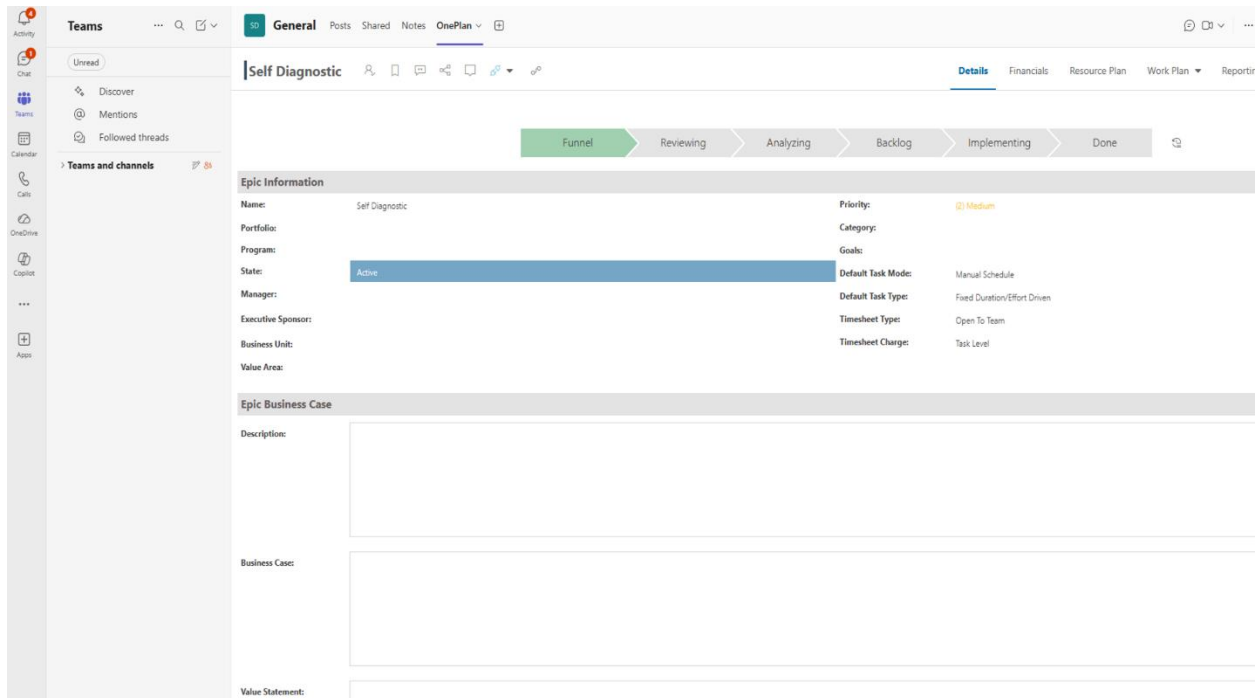
### Improved Comment Notifications:

- **Context Included in Email:** Reply notifications include the related thread so users can see what led to the reply.
- **Better Continuity for Stakeholders:** Helps occasional participants stay aligned even if they weren't following every message.
- **Faster, more informed responses:** Reduces confusion and follow-up questions by providing the full discussion context upfront.

## OnePlan Tab in Microsoft Teams

**Summary:** When OnePlan creates a team or a channel in Microsoft Teams for a plan, it will now automatically add a tab called OnePlan to the new channel. The new tab displays the plan that is associated with that channel using the OnePlan Teams App. The value is that users do not have to set this up manually for each plan.

- **OnePlan Tab in New Microsoft Teams and Channels:** When OnePlan creates a Microsoft Team or channel for a plan, a OnePlan tab is now automatically added to the newly created channel. The tab displays the associated plan using the OnePlan Teams app, making the plan immediately available to the team.





## Plan Area Admin

**Summary:** Area access can now be managed directly during area editing, making it easier to control who can see and use an area without jumping between configuration locations, improving governance while reducing admin effort.

- **Area Access Control:** Choose which permission groups can access an area while editing the area itself.
- **Faster Rollout of New Areas:** Quickly create and secure new areas for the right audiences without extra setup steps.
- **Clearer Governance:** Helps ensure the right teams see the right experiences, supporting cleaner navigation and better adoption.

## Time Off Admin

**Summary:** Time Off setup is now easier to manage by allowing administrators to configure time off categories and settings directly from the Time Off entry experience, reducing admin effort and speeding updates as policies change.

- **Time Off Admin Quick Access:** Manage time off configuration and categorization directly from the Time Off entry area for faster access.
- **Less Back-and-Forth:** Removes the need to navigate to separate admin pages for common time off changes.
- **Faster Policy Updates:** Quickly adjust categories as organizational needs evolve, improving consistency and user experience.

## OnePlan Core Framework Update

execution areas and applications to set a stronger foundation for ongoing usability enhancements. Users may notice minor visual differences, and organizations with customizations should review these areas to ensure everything continues to behave as expected.

### Applies To:

- Work Plan List, Portfolio List, Portfolio Board, Portfolio Roadmap, Portfolio Modeler List, Portfolio Modeler Board, My Work List, My Work Board

### Key updates:

- **Consistent Visual Refresh:** Minor UI changes across the listed experiences for a more unified and modern look.

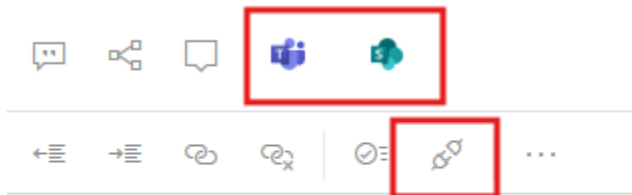
- **Customization Impact Awareness:** Existing customizations in these areas may be affected; administrators should validate and adjust as needed after the update.

## Plan Integrations Button Moved to a New Location

**Summary:** The Connected Systems button and Plan integrations have been moved to the plan toolbar, making integrations easier to find and access from a consistent location while keeping Teams and SharePoint connections visible at a glance.

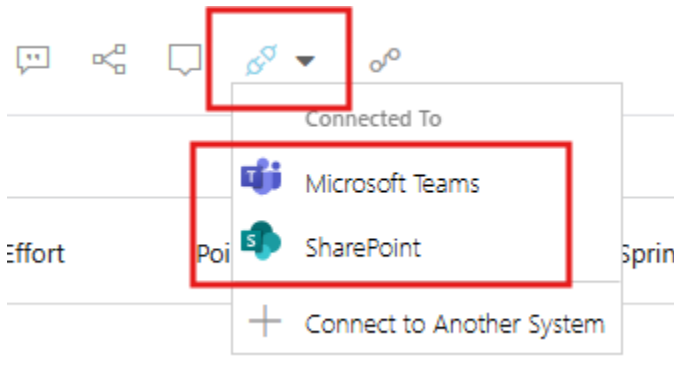
- **Work Plan Integration Button Move:** Makes integrations easier to discover and access at the plan level and provides a consistent home for all plan-related integrations.
- **Plan Integration Buttons Move:** The plan integration (SharePoint and Teams) buttons were moved under the Plan Connected Systems button for consistency.

Previous toolbar buttons:



Name

Integrations button on the plan toolbar showing different connections:



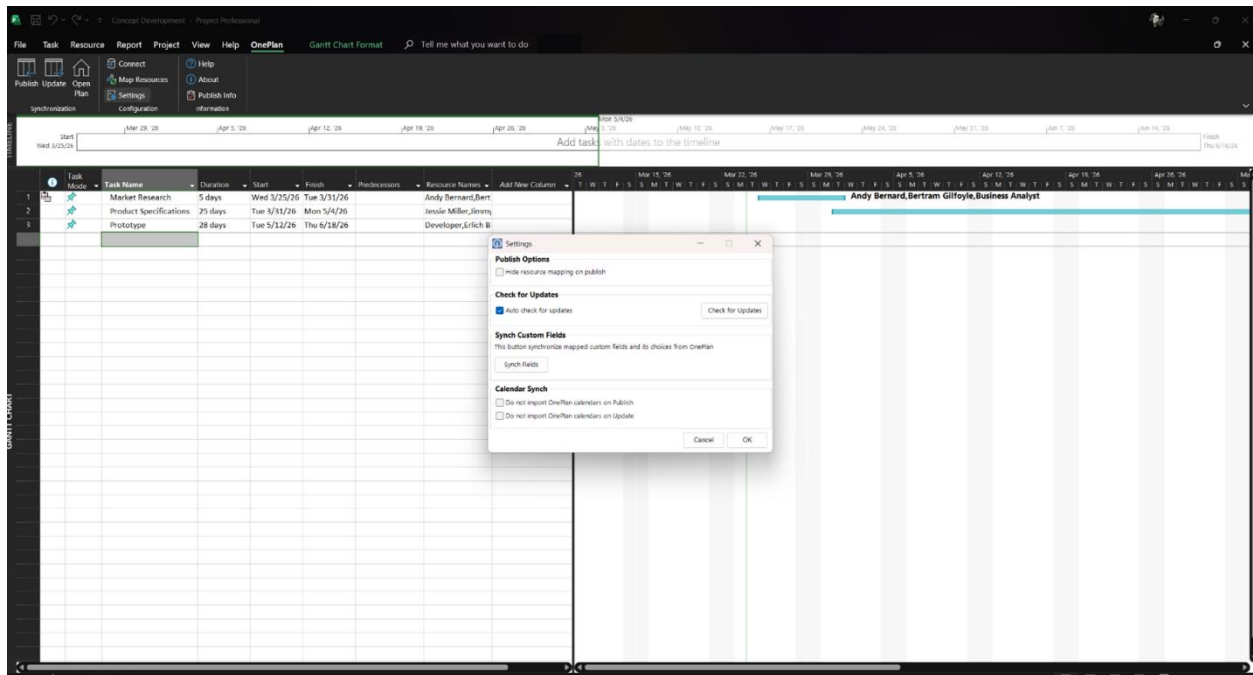
## Project Connector – Calendar Import

**Summary:** The Project Desktop connector can now automatically sync OnePlan Resource work calendars, reducing manual calendar maintenance and helping schedules stay accurate and consistent between Project files and the connected plan.

- **Project Connector - Work Calendar Import:** The OnePlan Project Desktop connector now supports synchronizing work calendars from OnePlan. When enabled for a project

file, calendar updates and new calendars are automatically synchronized when the project is published or updated. This eliminates the need to manually maintain calendars in Project (.mpp) files and ensures schedules remain aligned between OnePlan and Project Desktop.

- **Automatic Calendar Sync:** New and updated work calendars are synchronized automatically when a project is published or updated.
- **Per-File Control:** Enable or disable calendar updates per **Project (.mpp)** file, giving teams flexibility by project.
- **More reliable schedules:** Keeps working time assumptions aligned, improving the accuracy of schedule calculations and reporting.



## OData Reporting

**Summary:** This release enhances OData reporting in OnePlan by adding a filter for the plan ID to the financial and resource plan endpoints, empowering users to generate more targeted reports and enhance the download speed.

- **Performance Improvements:** Optimized data loading for Financial Plan OData tables ensures faster access to reporting data, especially for large datasets.
- **Advanced Date Filtering:** Apply greater than, less than, and inclusive date filters to Resource Plan and Financial Plan tables, enabling more precise and targeted reporting.



## Multi-Language for OneConnect Administration Portal

**Summary:** A new multi-language architecture similar to what is in OnePlan, introduces native French and Spanish support, translating system text in the OneConnect Administration Portal.

- **Native French UI:** Most menus, labels, messages, and feature names are translated.
- **Native Spanish UI:** Most menus, labels, messages, and feature names are translated.

**Note that integration field names and descriptions will not be translated at this time.**

## Smartsheet Integration API Upgrade

**Summary:** The Smartsheet integration has been upgraded to use the OneConnect 2.1 connector infrastructure and the latest Smartsheet APIs. This update moves Smartsheet to the latest OneConnect architecture, running on the newest Microsoft Azure hardware and software services.

- **Performance Upgrade:** Users will see improved performance and reliability for large data, while maintaining existing configurations and behavior.

## Asana Integration Infrastructure Upgrade

**Summary:** The Asana integration has been upgraded to use the OneConnect 2.1 connector infrastructure. This update moves Asana to the latest OneConnect architecture, running on the newest Microsoft Azure hardware and software services.

- **Performance Upgrade:** Users will see improved performance and reliability for large data, while maintaining existing configurations and behavior.

## P2MAP Integration Infrastructure Upgrade

**Summary:** The P2MAP integration has been upgraded to use the OneConnect 2.1 connector infrastructure. This update moves P2MAP to the latest OneConnect architecture, running on the newest Microsoft Azure hardware and software services.

- **Performance Upgrade:** Users will see improved performance and reliability for large data, while maintaining existing configurations and behavior.

## Trello Integration Infrastructure Upgrade

**Summary:** The Trello integration has been upgraded to use the OneConnect 2.1 connector infrastructure. This update moves Trello to the latest OneConnect architecture, running on the newest Microsoft Azure hardware and software services.



- **Performance Upgrade:** Users will see improved performance and reliability for large data, while maintaining existing configurations and behavior.

## Wrike Integration Infrastructure Upgrade

**Summary:** The Wrike integration has been upgraded to use the OneConnect 2.1 connector infrastructure. This update moves Wrike to the latest OneConnect architecture, running on the newest Microsoft Azure hardware and software services.

- **Performance Upgrade:** Users will see improved performance and reliability for large data, while maintaining existing configurations and behavior.