June 26, 2026 Release Notes

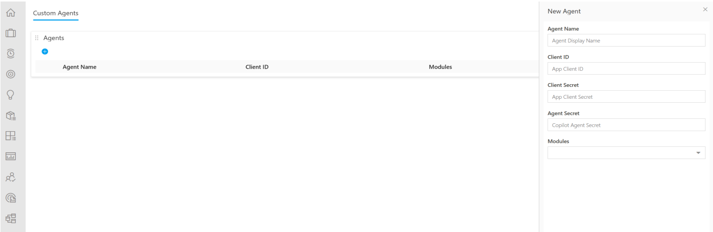
Release Summary

This release delivers greater control, flexibility, and efficiency across planning, resourcing, and everyday execution. Automation capabilities expand with Power Automate connectivity and run history visibility, while governance improvements strengthen data management across the plan lifecycle. The introduction of Work, Material, and Cost resource types brings a more complete approach to resource planning, reflected across the Resource Center, Resource Plan, and Work Plan. Teams benefit from Autosave, a redesigned inbox, and simplified administration — reducing friction where it matters most. Dashboard enhancements, Portfolio Roadmap improvements, and expanded AI capabilities with Sofia and OnePlan Custom Apps round out a release focused on helping organizations plan smarter and work more efficiently.

Sofia AI Assistant

Summary: Sofia AI brings Copilot capabilities directly into OnePlan, enabling organizations to embed AI assistance into their workflows and extend Sofia with custom Copilot agents tailored to their business needs.

- **Copilot Embedded in OnePlan:** Sofia now integrates Copilot directly within OnePlan, providing in-context AI assistance to help users analyze data, understand insights, and work more efficiently without leaving the application.
- **Extensible with Custom Copilot Agents:** Organizations can add their own Copilot agents to Sofia, allowing them to incorporate proprietary knowledge, custom workflows, and domain-specific intelligence.
- **Enterprise-Ready AI Experiences:** By enabling configurable Copilot agents, organizations can align AI interactions with their governance, data, and business processes while enhancing user productivity.


Custom Agents
Agents
Agent Name
Client ID
Modules
New Agent
Agent Name
Agent Display Name
Client ID
App Client ID
Client Secret
App Client Secret
Agent Secret
Copilot Agent Secret
Modules

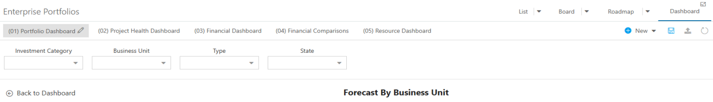
- 📚 [Related Articles]

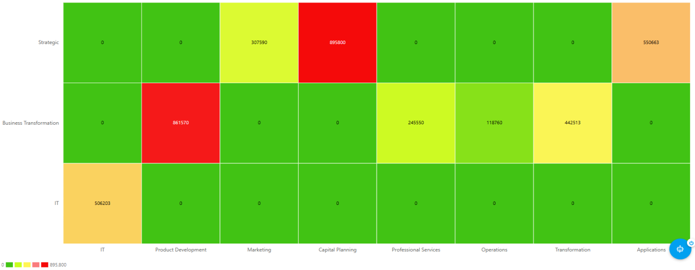
Dashboards🔗

Summary: Dashboard enhancements make it faster and easier for users to build, reuse, analyze, and share insights by simplifying dashboard management, expanding visualization options, and improving how data is explored across portfolio, plan, and resource views.

- **Dashboard Copy**: Users can quickly duplicate dashboards within the same group, reducing setup time and making it easier to reuse standard views across teams.
- **New Heatmap Widget**: A heatmap widget is now available on Portfolio, Plan, and Global Resource Plan dashboards, enabling visual comparison of data from work items, plans, resource plans, and financial plans to quickly identify trends and outliers.
- **New Gauge Widget**: A new gauge widget has been added to Portfolio, Plan, Global Resource Plan, and Modeler dashboards, supporting data from work items, plans, resource plans, financial plans, and models to clearly track progress against targets.
- **Dashboard Export and Import**: Dashboards can be exported to a downloadable file (excluding Power BI tabs) and imported into another environment, including layout, widgets, widget settings, filters, and slicers- making it easier to share and standardize dashboards.
- **Full Screen Widgets**: Widgets can now be expanded to full screen, allowing users to focus on individual metrics and visuals during analysis and presentations.

- **Pivot-Based Financial Analysis:** Financial data on the portfolio and plan level can now be represented using a pivot-style chart, allowing users to dynamically group and analyze financial metrics.


Enterprise Portfolios
List
Board
Roadmap
Dashboard
(01) Portfolio Dashboard
(02) Project Health Dashboard
(03) Financial Dashboard
(04) Financial Comparisons
(05) Resource Dashboard
New
Investment Category
Business Unit
Type
State
Back to Dashboard
Forecast By Business Unit



	IT	Product Development	Marketing	Capital Planning	Professional Services	Operations	Transformation	Applications
Strategic	0	0	307590	895800	0	0	0	550663
Business Transformation	0	861570	0	0	245550	118760	442513	0
IT	506203	0	0	0	0	0	0	0

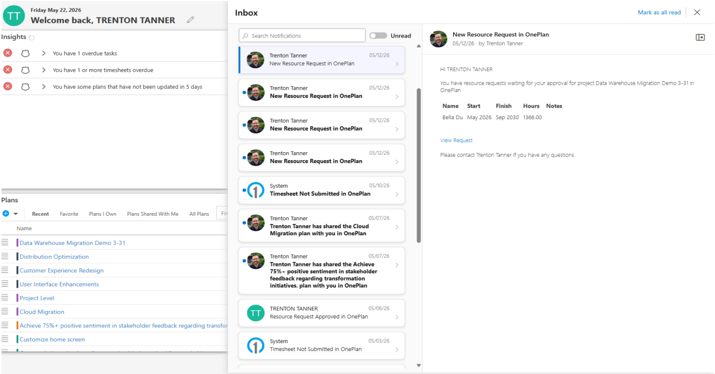
- 📚 Related Articles

Collaboration

Summary: The inbox experience has been redesigned to make managing notifications faster and more intuitive. With an updated look and feel and new in-system controls, users can stay on top of what matters without interrupting their workflow.

Inbox Redesign:

- **Updated Look and Feel:** Notifications have a refreshed, modern appearance that is easier to scan and act on.
- **New Notification Controls:** Manage your notifications directly within the system, without needing to navigate away from what you are working on.



Friday May 22, 2026
Welcome back, TRENTON TANNER

Insights

You have 1 overdue tasks
You have 1 or more timesheets overdue
You have some plans that have not been updated in 5 days

Plans

Name
Data Warehouse Migration Demo 3-31
Distribution Optimization
Customer Experience Redesign
User Interface Enhancements
Project Level
Cloud Migration
Achieve 75%+ positive sentiment in stakeholder feedback regarding transfor
Customize home screen

Inbox

Trenton Tanner 05/12/26
New Resource Request in OnePlan

Trenton Tanner 05/12/26
New Resource Request in OnePlan

Trenton Tanner 05/12/26
New Resource Request in OnePlan

Trenton Tanner 05/12/26
New Resource Request in OnePlan

System 05/10/26
Timesheet Not Submitted in OnePlan

Trenton Tanner 05/07/26
Trenton Tanner has shared the Cloud Migration plan with you in OnePlan

Trenton Tanner 05/07/26
Trenton Tanner has shared the Achieve 75%+ positive sentiment in stakeholder feedback regarding transformation initiatives. plan with you in OnePlan

TRENTON TANNER 05/06/26
Resource Request Approved in OnePlan

System 05/03/26
Timesheet Not Submitted in OnePlan

New Resource Request in OnePlan
05/12/26 · by Trenton Tanner

HI TRENTON TANNER

You have resource requests waiting for your approval for project Data Warehouse Migration Demo 3-31 in OnePlan

Name	Start	Finish	Hours	Notes
Bella Du	May 2026	Sep 2030	1366.00	

View Request

Please contact Trenton Tanner if you have any questions.

TT
Recent
Favorite
Plans I Own
Plans Shared With Me
All Plans
Search Notifications
Unread
Mark as all read

Work Plan

Summary: Three updates to the Work Plan improve how resources are assigned and managed, and reduce friction in day-to-day plan editing. The resource assignment experience now reflects the new Work, Material, and Cost structure, while Autosave removes the need to manually save changes keeping teams focused on the work rather than the tool.

Autosave:

- **Automatic Saving:** Changes made to non-schedule work types are saved automatically when Autosave is enabled - no manual confirmation needed.

- **Less Interruption:** Teams can focus on updating plans without worrying about losing changes.

Resource Assignment Picker:

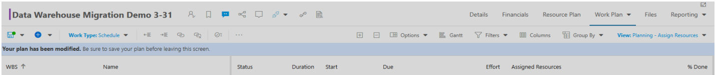
- **Tabbed Resource Selection:** Search and select Work, Material, and Cost resources from dedicated tabs within the assignment picker.
- **Type-Specific Inputs:** Each tab supports the relevant input for that resource type - Units for Work, Quantity for Material, and Cost for Cost resources.

Advanced Edit - Assignment Detail:

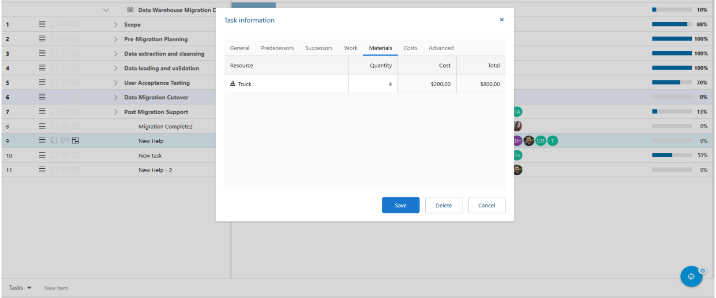
- **Expanded Assignment View:** The advanced edit panel now displays full assignment detail across Work, Material, and Cost resource tabs for any task.
- **Manage All Resource Types in One Place:** Review and update all resource assignments directly from the advanced edit experience without navigating away.

Material and Cost Resource Calculations:

- **New Resource Type Calculation Support:** Work plan fields can calculate costs specific to material and cost resources, giving teams granular cost visibility directly within the schedule.


Data Warehouse Migration Demo 3-31
Details
Financials
Resource Plan
Work Plan
Files
Reporting
Work Type: Schedule
Options
Gantt
Filters
Columns
Group By
View: Planning - Assign Resources
WBS
Name
Status
Duration
Start
Due
Effort
Assigned Resources
% Done

Your plan has been modified. Be sure to save your plan before leaving this screen.


Task information
General
Predecessors
Successors
Work
Materials
Costs
Advanced
Save
Delete
Cancel
Tasks
New Item

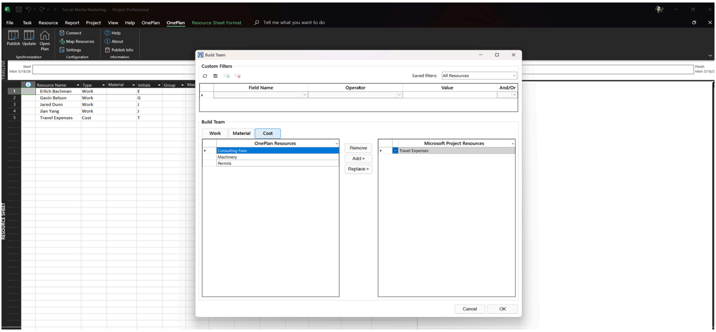
	Task	
	Data Warehouse Migration D	10%
1	Scope	88%
2	Pre-Migration Planning	100%
3	Data extraction and cleansing	100%
4	Data loading and validation	100%
5	User Acceptance Testing	70%
6	Data Migration Cutover	0%
7	Post Migration Support	13%
8	Migration Complete2	0%
9	New Help	0%
10	New task	50%
11	New Help - 2	0%

Resource	Quantity	Cost	Total
Truck	4	$200.00	$800.00

Project Connector

Summary: Enhancements to the OnePlan Microsoft Project Connector extend support for cost resources, enabling comprehensive synchronization between OnePlan and Microsoft Project for cost-driven planning and tracking.

- **Publish Cost Resources:** The Project Connector now supports cost resources, allowing cost resources in OnePlan to be mapped directly to cost resources in local Microsoft Project (.mpp) files.
- **Comprehensive Task Assignments:** During publish, task assignments for cost resources are created in the Microsoft Project file, ensuring cost data is aligned.


Social Media Marketing - Project Professional
File
Task
Resource
Report
Project
View
Help
OnePlan
OnePlan
Resource Sheet Format
Tell me what you want to do
Publish
Update
Open Plan
Synchronization
Connect
Map Resources
Settings
Configuration
Help
About
Publish Info
Information
TIMELINE
Start Mon 5/18/26
Finish Mon 5/18/2
RESOURCE SHEET
Build Team
Custom Filters
Saved filters:
All Resources
Build Team
Work
Material
Cost
Remove
Add >
Replace >
Cancel
OK

	Resource Name	Type	Material	Initials	Group
1	Erlich Bachman	Work		E	
2	Gavin Belson	Work		G	
3	Jared Dunn	Work		J	
4	Jian Yang	Work		J	
5	Travel Expenses	Cost		T	

Field Name	Operator	Value	And/Or

OnePlan Resources
Consulting Fees
Machinery
Permits

Microsoft Project Resources
☑ Travel Expenses

Plan Details

Summary: Three enhancements to Plan Details give organizations more precise control over how data is managed and presented. Business rules now factor in who is logged in, enabling personalized governance experiences, while cascading fields have been simplified to reduce redundant data setup and improve reporting consistency. User picker fields now also enforce filter rules more strictly, ensuring the right resources are always available for selection.

Business Rules - User Evaluation:

- **User-Aware Rules:** Business rules can now evaluate Plan User Fields against the logged in user, their security groups, and their teams.

- **Contextual Data Control:** Drive required, read-only, and hidden field behavior based on who is viewing the plan, not just what the plan contains.

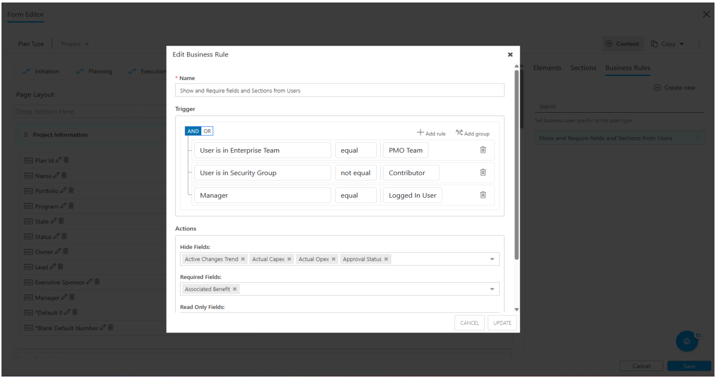
- **Stronger Governance:** Ensure the right people see and interact with the right data without additional customization.

Cascading Filtered Fields:

- **Cleaner Choice Lists:** Consolidate redundant values that previously had to be duplicated to support different parent selections.
- **Improved Reporting:** Fewer duplicate values means cleaner, more consistent data across plans and portfolio reporting.

User Picker Field Filter Enforcement:

- **Filters Take Priority:** When a filter rule is configured on a user picker field, recent selections are no longer shown, ensuring only valid options are available for selection.


Form Editor
Plan Type
Project
Content
Copy
Initiation
Planning
Execution
Page Layout
Drop Section Here
Project Information
Plan Id
Name
Portfolio
Program
State
Status
Owner
Lead
Executive Sponsor
Manager
*Default 0
*Blank Default Number
Elements
Sections
Business Rules
Create new
Search
Set business rules specific to this plan type
Show and Require fields and Sections from Users
Cancel
Save

Edit Business Rule

* Name: Show and Require fields and Sections from Users

Trigger

AND
OR
Add rule
Add group

User is in Enterprise Team | equal | PMO Team

User is in Security Group | not equal | Contributor

Manager | equal | Logged In User

Actions

Hide Fields: Active Changes Trend, Actual Capex, Actual Opex, Approval Status

Required Fields: Associated Benefit

Read Only Fields:

CANCEL
UPDATE

Automations

Summary: OnePlan Automations continue to get more powerful with two new enhancements.

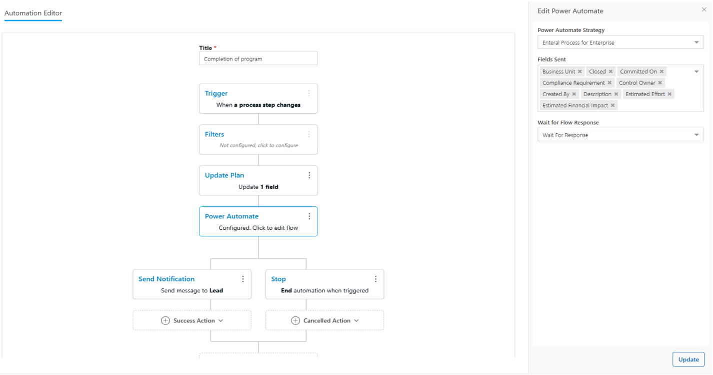
Teams can now connect their automations directly to Microsoft Power Automate workflows, unlocking a broader ecosystem of integrations and business processes from within OnePlan. A new Run History view also gives administrators and plan managers greater visibility and control over automation activity.

Automation Power Automate Action:

- **Connect to Power Automate:** Trigger a Microsoft Power Automate workflow as an action within an OnePlan Automations.
- **Continue or Wait:** Launch the flow and keep moving, or pause and wait for a response before proceeding.
- **Success and Cancel Branches:** Define what happens next based on the outcome of the flow, so downstream actions behave as expected.

Automation Run History:

- **Full Visibility:** View active and completed automations with a 30-day run history.
- **Cancel In-Progress Runs:** Stop a running automation directly from the Run History view when plans change.


Automation Editor
Trigger
When a process step changes
Filters
Not configured, click to configure
Update Plan
Update 1 field
Power Automate
Configured. Click to edit flow
Send Notification
Send message to Lead
Stop
End automation when triggered
Success Action
Cancelled Action
Edit Power Automate
Update

Title *
Completion of program

Power Automate Strategy
Enteral Process for Enterprise

Fields Sent
Business Unit ✖ Closed ✖ Committed On ✖
Compliance Requirement ✖ Control Owner ✖
Created By ✖ Description ✖ Estimated Effort ✖
Estimated Financial Impact ✖

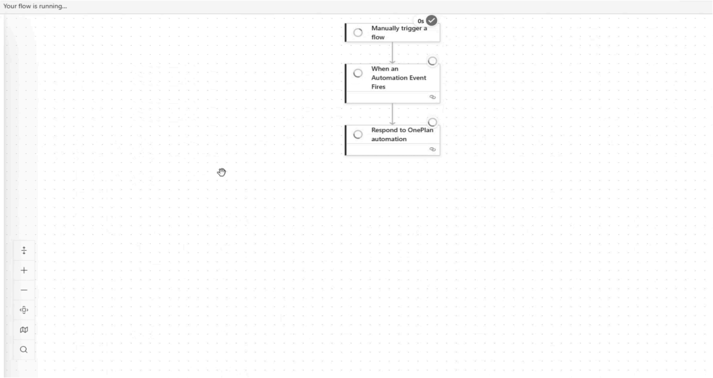
Wait for Flow Response
Wait For Response

Power Platform Connector

Summary: Power Platform Connector enhancements enable tighter coordination between Power Automate and OnePlan automations, allowing flows to resume OnePlan execution and return clear outcomes for more reliable, end-to-end process automation.

- **Resume OnePlan Automations:** A new Power Automate action allows flows to resume the execution of a paused OnePlan automation, enabling seamless continuation of complex workflows.

- **Action Result Handling:** The resume action supports both positive and negative responses, such as success or cancelled, ensuring OnePlan automations can react appropriately to flow outcomes.
- **Improved Cross-System Orchestration:** By coordinating execution state between Power Automate and OnePlan, organizations can build robust, multi-step workflows that span systems while maintaining clear control and feedback.

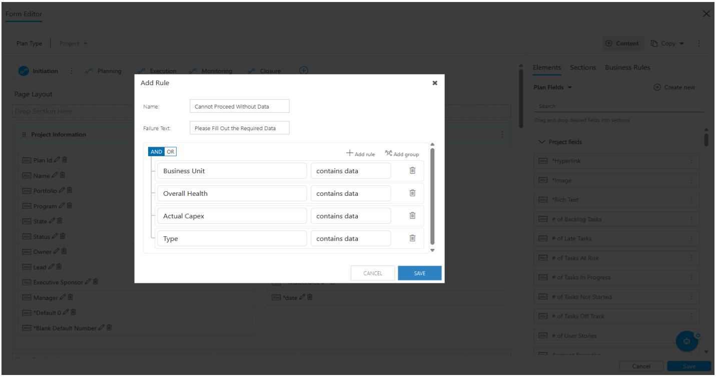

Your flow is running...
0s
Manually trigger a flow
When an Automation Event Fires
Respond to OnePlan automation

Portfolio Plan

Summary: Stage gate rules for plan process steps now support data validation, giving organizations greater control over plan lifecycle progression. Teams can enforce that required information is present or absent before a plan is allowed to move forward, reducing incomplete submissions and improving governance.

Stage Gate Rules — Contains / Does Not Contain:

- **Enforce Data Requirements:** Configure stage gate rules that check whether a field contains or does not contain specific data before a process step can progress.
- **Prevent Incomplete Plans:** Stop plans from advancing through the lifecycle until the right information is in place.
- **Improve Governance:** Ensure consistent, complete data across all plans without relying on manual reviews.


Form Editor
Plan Type
Project
Content
Copy
Initiation
Planning
Execution
Monitoring
Closure
Page Layout
Drop Section Here
Project Information
Plan Id
Name
Portfolio
Program
State
Status
Owner
Lead
Executive Sponsor
Manager
*Default 0
*Blank Default Number
*date
Elements
Sections
Business Rules
Plan Fields
Create new
Search
Drag and drop desired fields into sections
Project fields
*Hyperlink
*Image
*Rich Text
# of Backlog Tasks
# of Late Tasks
# of Tasks At Risk
# of Tasks In Progress
# of Tasks Not Started
# of Tasks Off Track
# of User Stories
Cancel
Save
AND
OR
Add rule
Add group
CANCEL
SAVE

Add Rule

Name: Cannot Proceed Without Data

Failure Text: Please Fill Out the Required Data

Business Unit	contains data
Overall Health	contains data
Actual Capex	contains data
Type	contains data

Status Reports

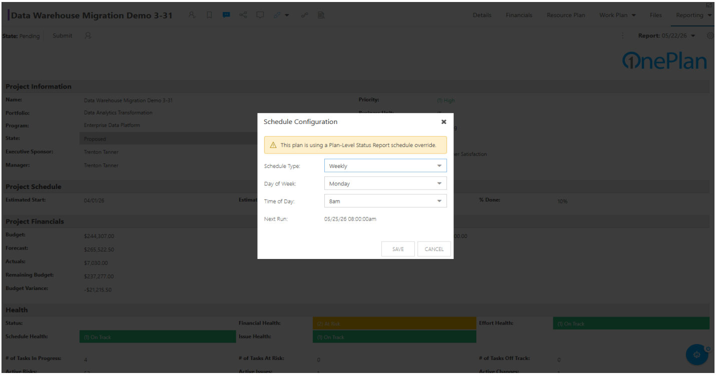
Summary: Flexible status report submission allows users to capture updates when they matter most by submitting status reports manually and off schedule, while still maintaining the same governance and approval process.

Plan Level Status Report Schedules:

- **Off-Cycle Status Submissions:** Users can submit status reports manually for individual plans outside the regular reporting schedule, ensuring important updates aren’t delayed.
- **Consistent Approval Workflow:** Manually submitted status reports follow the same approval process as scheduled reports, preserving governance and auditability.
- **Timely Project Visibility:** By enabling ad-hoc submissions, stakeholders gain faster insight into changes, risks, or progress as they happen.

Status Report Configuration in Setup:

- **Front-End Access:** Status Report configuration is now accessible directly through OnePlan Setup and while Status Reports are open, providing ease of access.


Schedule Configuration

This plan is using a Plan-Level Status Report schedule override.

Schedule Type: Weekly

Day of Week: Monday

Time of Day: 8am

Next Run: 05/25/26 08:00:00am

SAVE
CANCEL

Resource Plan

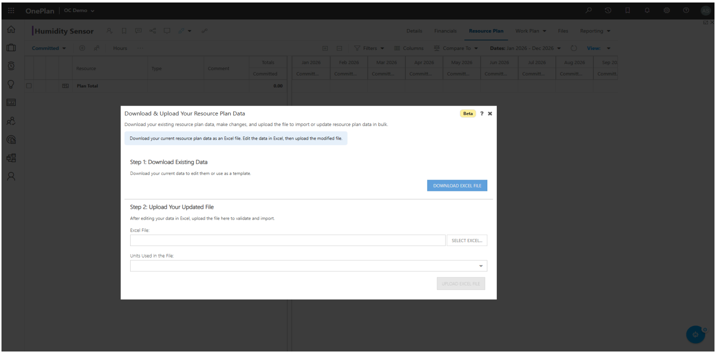
Summary: Two updates to the Resource Plan make it easier to manage and adjust resource data at scale. Plan leaders can now edit resource plans offline in bulk using Excel, and shift entire resource plans forward or backward in one action when schedules change.

Import Resource Plan:

- **Bulk Edit via Excel:** Download a resource plan, make changes offline in Excel, and upload the file back into OnePlan for processing.
- **Validation on Import:** Field types and data are validated before changes are applied, ensuring data integrity.

Bulk Resource Plan Move:

- **Move the Entire Plan at Once:** Shift all resources and allocations forward or backward in a single action at the plan level.
- **Intuitive Interaction:** Hovering over plan-level data transforms the cursor and displays a tooltip, making the bulk move capability easy to discover and use.


OnePlan
OC Demo
Humidity Sensor
Details
Financials
Resource Plan
Work Plan
Files
Reporting
Committed
Hours
Filters
Columns
Compare To
Dates: Jan 2026 - Dec 2026
View:
Resource
Type
Comment
Totals
Committed
Plan Total
0.00
Jan 2026
Feb 2026
Mar 2026
Apr 2026
May 2026
Jun 2026
Jul 2026
Aug 2026
Beta
DOWNLOAD EXCEL FILE
SELECT EXCEL...
UPLOAD EXCEL FILE

Download & Upload Your Resource Plan Data

Download your existing resource plan data, make changes, and upload the file to import or update resource plan data in bulk.

Download your current resource plan data as an Excel file. Edit the data in Excel, then upload the modified file.

Step 1: Download Existing Data

Download your current data to edit them or use as a template.

Step 2: Upload Your Updated File

After editing your data in Excel, upload the file here to validate and import.

Excel File:

Units Used in the File:

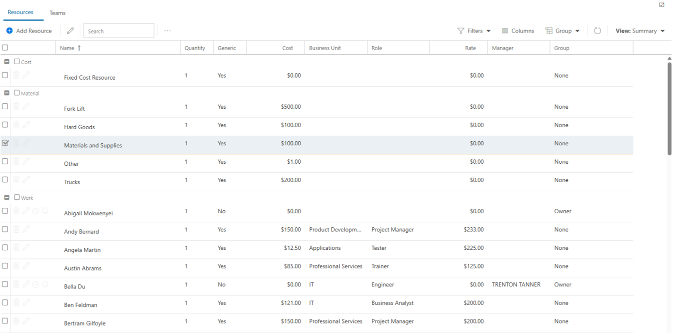
- 📚 Related Articles

Resource Center🔗

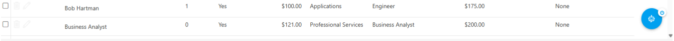
Summary: OnePlan is introducing a more structured approach to resource planning with the addition of Work, Material, and Cost resource types. This update gives organizations greater planning accuracy by capturing the full picture of what it takes to deliver people, materials, and costs all within the same planning experience.

Work, Material, and Cost Resource Types:

- **New Resource Structure:** Resources are now categorized as Work, Material, or Cost, reflecting how organizations plan and track delivery.
- **Comprehensive Planning:** A unified view of all resource dimensions improves the reliability of plans and forecasts.


Resources
Teams
Add Resource
Search
Filters
Columns
Group
View: Summary

☐	Name	Quantity	Generic	Cost	Business Unit	Role	Rate	Manager	Group
☐ Cost									
☐	Fixed Cost Resource	1	Yes	$0.00			$0.00		None
☐ Material									
☐	Fork Lift	1	Yes	$500.00			$0.00		None
☐	Hard Goods	1	Yes	$100.00			$0.00		None
☑	Materials and Supplies	1	Yes	$100.00			$0.00		None
☐	Other	1	Yes	$1.00			$0.00		None
☐	Trucks	1	Yes	$200.00			$0.00		None
☐ Work									
☐	Abigail Mokwenyei	1	No	$0.00			$0.00		Owner
☐	Andy Bernard	1	Yes	$150.00	Product Developm...	Project Manager	$233.00		None
☐	Angela Martin	1	Yes	$12.50	Applications	Tester	$225.00		None
☐	Austin Abrams	1	Yes	$85.00	Professional Services	Trainer	$125.00		None
☐	Bella Du	1	No	$0.00	IT	Engineer	$0.00	TRENTON TANNER	Owner
☐	Ben Feldman	1	Yes	$121.00	IT	Business Analyst	$200.00		None
☐	Bertram Gilfoyle	1	Yes	$150.00	Professional Services	Project Manager	$200.00		None



☐	Bob Hartman	1	Yes	$100.00	Applications	Engineer	$175.00	None
☐	Business Analyst	0	Yes	$121.00	Professional Services	Business Analyst	$200.00	None

Timesheets

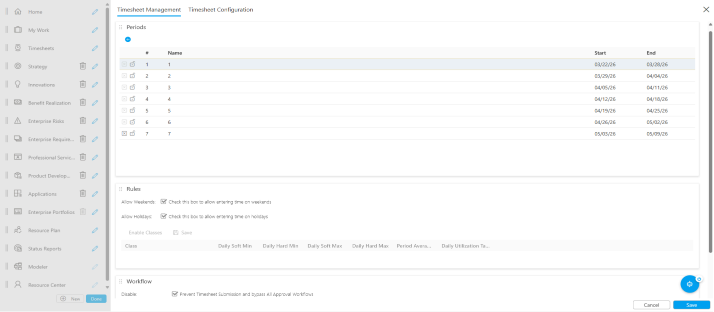
Summary: Organizations that need detailed time tracking data without the overhead of a full submission and approval process can now disable those steps for timesheet line items. Time data continues to flow through the system as normal, giving teams the reporting they need with less administrative burden. Timesheet configuration has also been moved to OnePlan Setup for faster, easier administration.

Auto Submit and Approve for Timesheet Line Items:

- **Flexible Timesheet Controls:** Turn off the submit and approval steps for timesheet line items where that overhead isn't needed.
- **Data Flows as Normal:** All time data continues to move through the system just as it would with a standard timesheet process.
- **Reporting Without the Overhead:** Get the detailed time tracking insight your organization needs without requiring users to go through unnecessary steps.

Timesheet Configuration in Setup:

- **Front-End Access:** Timesheet configuration is now accessible directly through OnePlan Setup, removing the need to navigate to separate administration areas.


Home
My Work
Timesheets
Strategy
Innovations
Benefit Realization
Enterprise Risks
Enterprise Require...
Professional Servic...
Product Develop...
Applications
Enterprise Portfolios
Resource Plan
Status Reports
Modeler
Resource Center
New
Done
Timesheet Management
Timesheet Configuration

Periods

#	Name	Start	End
1	1	03/22/26	03/28/26
2	2	03/29/26	04/04/26
3	3	04/05/26	04/11/26
4	4	04/12/26	04/18/26
5	5	04/19/26	04/25/26
6	6	04/26/26	05/02/26
7	7	05/03/26	05/09/26

Rules

Allow Weekends: ☑ Check this box to allow entering time on weekends

Allow Holidays: ☑ Check this box to allow entering time on holidays

Enable Classes
Save

Class	Daily Soft Min	Daily Hard Min	Daily Soft Max	Daily Hard Max	Period Avera...	Daily Utilization Ta...

Workflow

Disable: ☑ Prevent Timesheet Submission and bypass All Approval Workflows

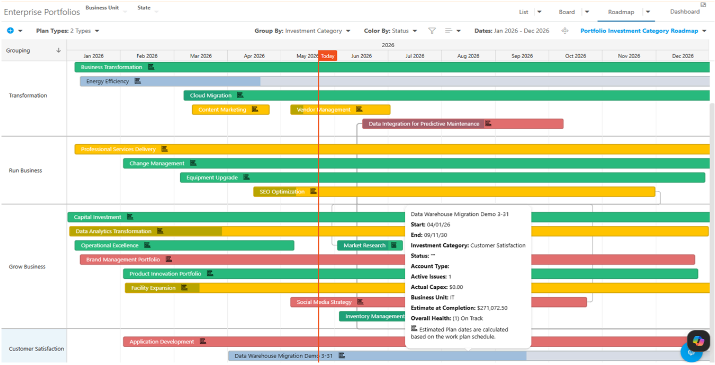
Cancel
Save

Portfolio Roadmap

Summary: The Portfolio Roadmap now surfaces more of the information that matters. Teams can select additional plan fields to display directly in the roadmap view, adding context that makes portfolio reviews and reporting more meaningful without leaving the visualization.

Additional Fields in Roadmap View:

- **Configurable Field Display:** Select which plan fields appear on plans within the roadmap view to match your reporting and review needs.
- **More Context at a Glance:** Key plan details are visible directly in the visualization, reducing the need to open individual plans for information.


Enterprise Portfolios
Business Unit
State
List
Board
Roadmap
Dashboard
Grouping
2026
Jan 2026
Feb 2026
Mar 2026
Apr 2026
May 2026
Today
Jun 2026
Jul 2026
Aug 2026
Sep 2026
Oct 2026
Nov 2026
Dec 2026
Transformation
Business Transformation
Energy Efficiency
Cloud Migration
Content Marketing
Vendor Management
Data Integration for Predictive Maintenance
Run Business
Professional Services Delivery
Change Management
Equipment Upgrade
SEO Optimization
Grow Business
Capital Investment
Data Analytics Transformation
Operational Excellence
Market Research
Brand Management Portfolio
Product Innovation Portfolio
Facility Expansion
Social Media Strategy
Inventory Management
Customer Satisfaction
Application Development
Data Warehouse Migration Demo 3-31

Plan Types: 2 Types

Group By: Investment Category

Color By: Status

Dates: Jan 2026 - Dec 2026

Portfolio Investment Category Roadmap

Data Warehouse Migration Demo 3-31

Start: 04/01/26

End: 09/11/30

Investment Category: Customer Satisfaction

Status: ""

Account Type:

Active Issues: 1

Actual Capex: $0.00

Business Unit: IT

Estimate at Completion: $271,072.50

Overall Health: (1) On Track

Estimated Plan dates are calculated based on the work plan schedule.

OnePlan Migration Tool🔗

Summary: Enhancements to the OnePlan Migration Tool improve accuracy and transparency during data migration by adding support for new resource types and providing clearer validation feedback at the task level.

- **Support for Resource Types:** The Migration Tool now supports the new resource type fields in OnePlan, ensuring work, material, and cost resources are validated correctly based on required source data such as effort, quantity, and cost.
- **Task-Level Validation Results:** Validation results for individual work items (tasks) can now be written to a work plan–level field, capturing any data issues detected during migration.

Rest API & OData🔗

Summary: OnePlan has updated API and OData throttling controls to improve platform performance and scalability. Customers using REST APIs or OData should review their integrations and reporting solutions to ensure they follow the latest best practices.

- **Graph Endpoint Required:** API and OData requests are no longer supported on the standard my.oneplan.ai endpoint. Integrations, applications, and reports that should be updated to use the mygraph.oneplan.ai endpoint before this release.
- **Rate Limiting & Throttling:** OnePlan now enforces request limits per minute, hour, and day. Requests that exceed these limits will be throttled and may eventually receive a (429) Too Many Requests response until usage returns within the allowed thresholds. Rest API requests are limited to 500 requests per minute, 25,000 requests per hour, and 300,000 requests per day, per OnePlan group. OData requests are limited to 1,000 requests per minute, 25,000 requests per hour, and 300,000 requests, per day, per OnePlan group.

- **Best Practice Recommendations:** To avoid throttling, update all my.oneplan.ai API and OData connections to use the mygraph.oneplan.ai endpoint and stagger report refreshes, integrations, and other automated processes where possible rather than running them concurrently.

OnePlan Backup Utility

Summary: The OnePlan Backup Utility now uses Microsoft Entra ID or OnePlan authentication instead of API keys, improving security and simplifying access.

- **Authentication Change:** API key authentication is no longer supported. Users must sign in using their Microsoft Entra ID or OnePlan credentials.
- **Upgrade Required:** Older versions of the Backup Utility will no longer work. Download the latest version to continue backing up and restoring OnePlan groups, configuration, and data. If you use the Backup Utility to schedule automated backups, you must also upgrade to the new version of the Backup Utility. Customers using automated backups on my.oneplan.ai must also configure the utility to use the mygraph.oneplan.ai endpoint by updating the URL using the command prompt as described in the installation instructions.

Support

Summary: Getting help from OnePlan just got simpler. The new Assist feature allows organizations to grant OnePlan support teams temporary access to their environment without adding external accounts or consuming a license, making the support experience faster and more secure.

- **Assist:**

  - **Temporary Support Access:** Grant OnePlan support access to your group directly, without the need to create or manage external accounts.

  - **No License Consumed:** Support access does not count against your organization's license allocation.

  - **Controlled and Time-Bound:** Set an expiration date for access, or remove it manually once support work is complete.

OnePlan Custom Apps🔗

Summary:
OnePlan Custom Apps enable organizations to securely authenticate and interact with OnePlan APIs using a user context, providing greater control, flexibility, and security for custom solutions and AI-driven integrations.

- **Custom App Authentication**: Users can create OnePlan Custom Apps to authenticate against OnePlan APIs, supporting scenarios such as MCP servers and custom-built solutions that use OnePlan APIs.
- **User Context API Access**: APIs can now be accessed using a user context rather than integration keys, ensuring actions and data access reflect the permissions of the authenticated user.
- **Enables AI and Advanced Integrations**: Custom Apps provide a secure foundation for AI-driven experiences and external applications that require controlled, contextual access to OnePlan data.
  - 📚 Related Articles

Multi-Language 🔗

Summary: OnePlan continues to expand its language support with the addition of German (Deutsch), making it easier for German-speaking users to onboard and work within the system in their preferred language.

OnePlan German (Deutsch) Language Support:

  - **New Language Available:** Users can now select German (Deutsch) as their preferred language within OnePlan.

  - **System Translation:** Menus, labels, and system text are displayed in German, supporting a more natural experience for German-speaking teams.

OneConnect German (Deutsch) Language Support:

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

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1 out of 1 found this helpful

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