November 6, 2026, Release Notes

Note
Access the live release notes on the OnePlan support portal here.

Release Summary

This release introduces the new Strategic Execution Management (SEM) solution and a preview of the OnePlan MCP Server, enabling organizations to better align strategy with execution and interact with OnePlan through AI assistants. Additional enhancements improve portfolio visibility and security, expand dashboards and status reporting, and simplify everyday work across financial planning, timesheets, and work plans. The release also includes a modernized mobile app, Portuguese language support, more granular integration security controls, and performance improvements to key integrations.

New Strategy Execution Management Solution

Summary: The new Strategic Execution Management (SEM) solution template helps organizations connect business strategy to execution and measurable outcomes. It provides a structured approach to defining strategic objectives, aligning initiatives and investments, tracking goals and OKRs, and measuring progress and business benefits. With integrated dashboards, roadmaps, and performance reporting, organizations gain visibility into strategic execution, enabling better prioritization, informed decisions, and improved business outcomes.

- **Align Strategy with Execution:** Connect strategic objectives to initiatives, investments, and measurable outcomes.
- **Improve Visibility:** Track progress, performance, and business benefits through centralized dashboards and reporting.
- **Drive Better Decisions:** Prioritize investments and initiatives based on strategic alignment and expected value.
- **Increase Accountability:** Establish clear ownership of strategic goals and monitor progress toward achieving them.

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New OnePlan MCP Server - Preview

Summary: The OnePlan MCP Server, available in preview, connects AI assistants such as Microsoft Copilot and Claude to OnePlan through the Model Context Protocol (MCP), an open standard for linking AI assistants to business systems. Users can explore and update plans, resources, financials, and work items in plain language, always within their own OnePlan permissions. Organizations interested in the preview can contact their Customer Success Manager (CSM).

OnePlan MCP Server

- **Preview Mode**: The OnePlan MCP Server is available in preview. If you are interested in testing it, reach out to your Customer Success Manager (CSM).

MCP for Portfolio

- **Find and Explore Plans**: Search by name, plan type, parent, or field values, and explore the hierarchy beneath a program.
- **Create and Progress Plans**: Create new plans, update fields, and move plans to their next stage.

MCP for Resource Management

- **Find the Right People**: Check capacity, allocations, and availability, and compare candidates side by side on availability or cost rate.
- **Adjust Allocations**: Add or edit allocations, move them to new dates, and replace or fulfill resources, with a preview before anything is saved.

MCP for Financial Management

- **Understand Your Numbers**: View budget, forecast, or actuals by cost category, and compare cost types to see where a plan is over or under budget.
- **Update Financials**: Add or edit values for a single period or across a range, and move a cost category's allocation to different months.

MCP for Work Plan

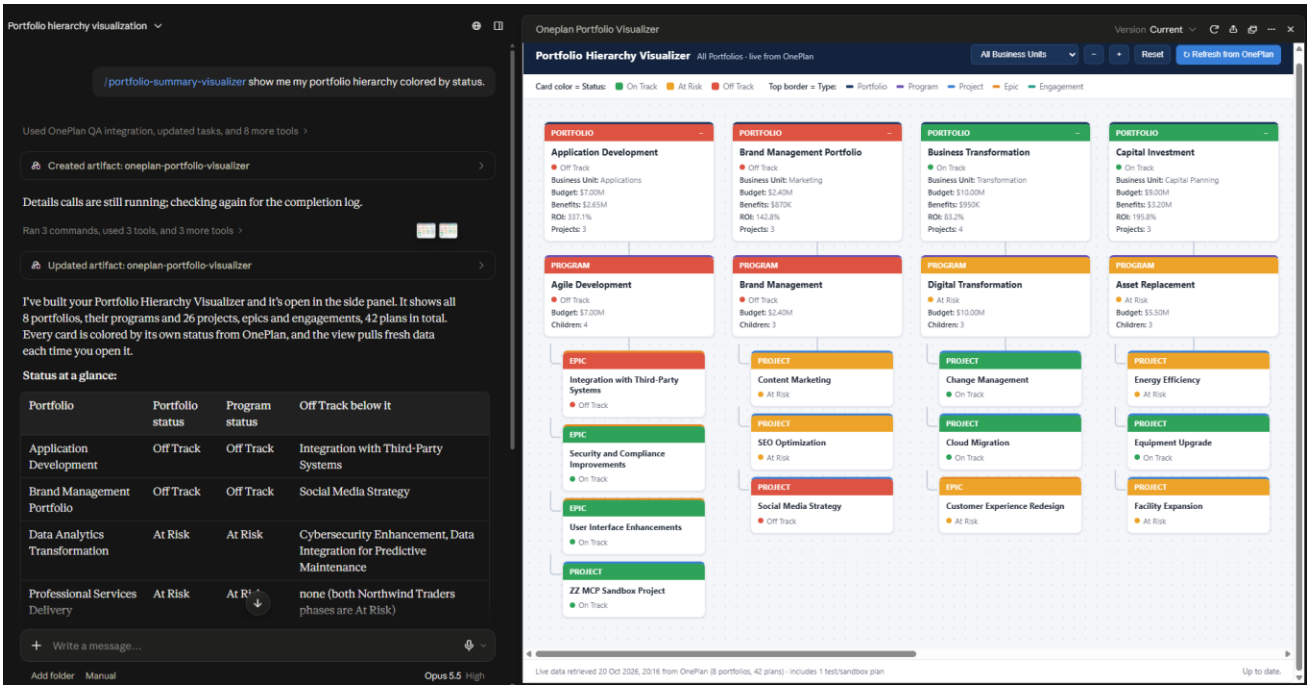
- **See the Work**: View work items such as tasks, risks, and issues, along with their details and dependencies.

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- **Know Who Is Doing What**: List everything beneath a phase and see who is assigned to work items on a plan.

MCP for My Work

- **See Your Assignments**: Ask your assistant for the work items assigned to you and get a clear view of what is on your plate.
- **Update Task Status**: Post status updates on your assigned tasks directly from your assistant, so progress reaches your team sooner.

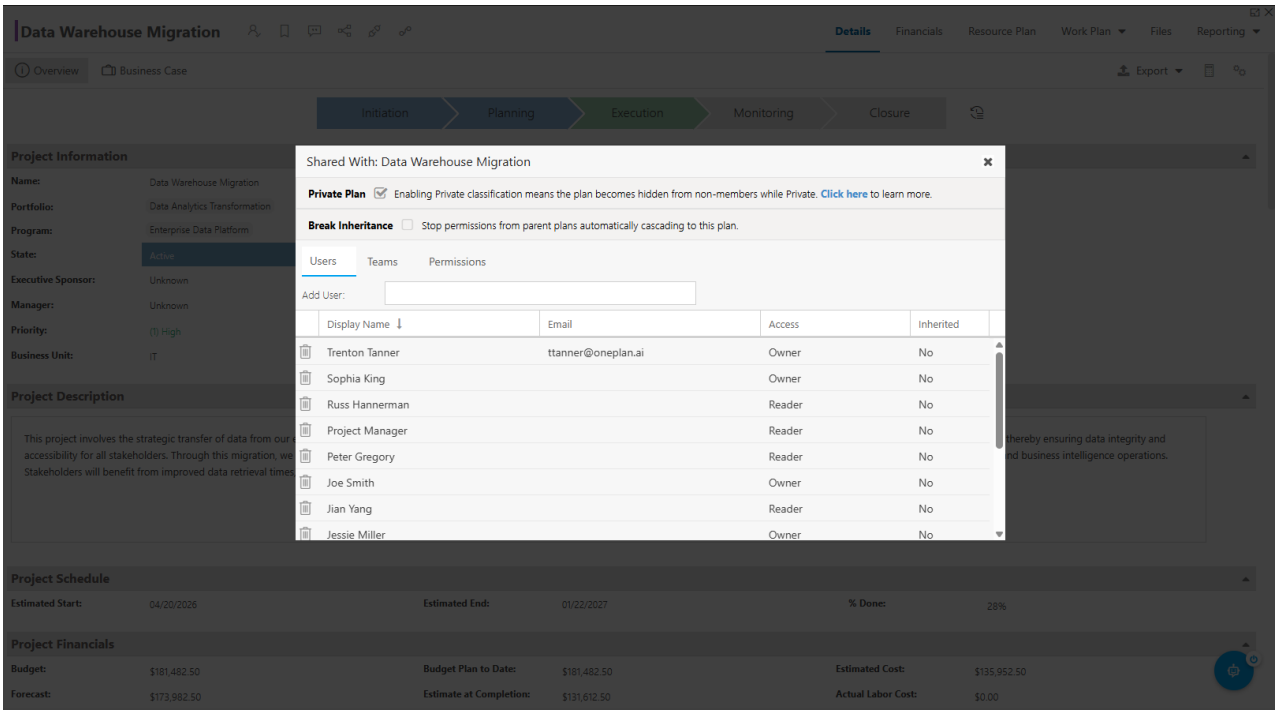


Portfolio

Summary: Portfolio management gains more control, flexibility, and automation. Organizations can keep sensitive plans private to their plan teams, tailor plan detail pages with business rules, and see split data across more views. Automations that carry over plan hierarchy and on-demand roadmap printing help teams set up and share work faster.

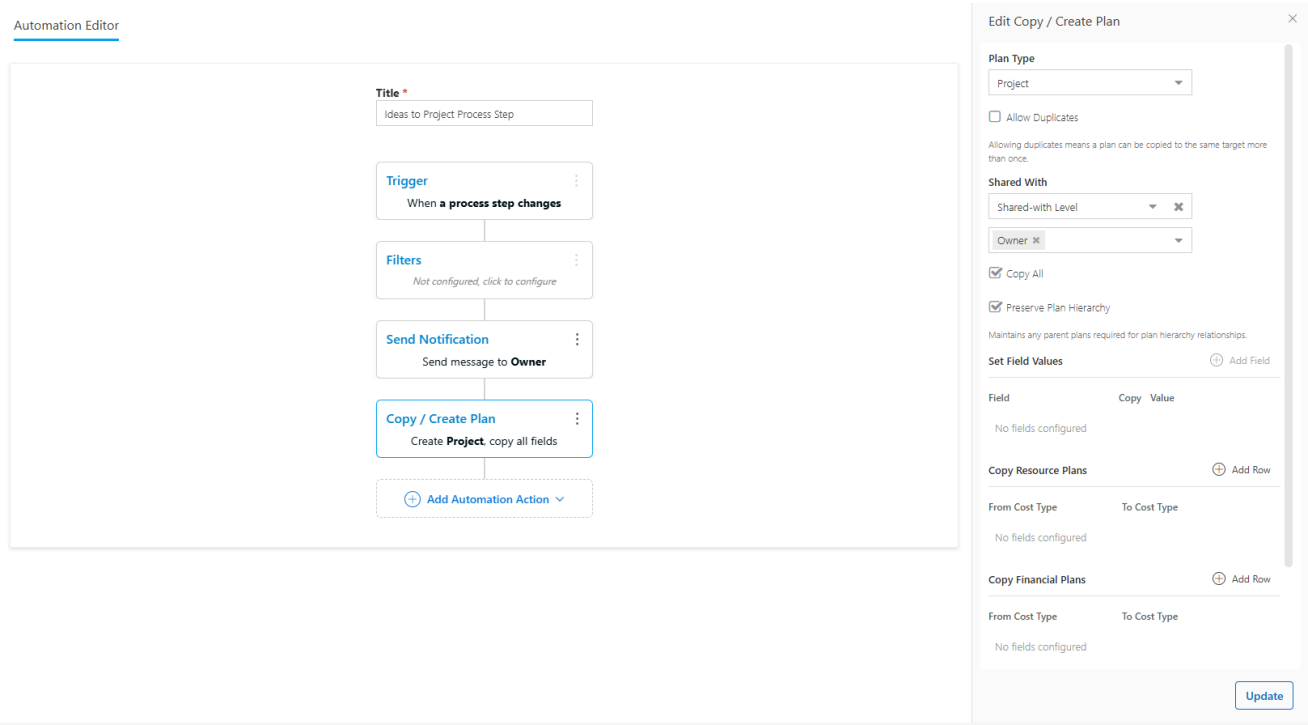
Private Plans

- **Controlled Visibility**: Private plans can be turned on by plan type, and plan owners can limit full access to the members of their plan team.
- **Consistent Across OnePlan**: Private plan permissions apply in My Work, Timesheets, Resource Plan, Modeler, Notifications, Comments, Dashboards, and the Home Page.
- **External Reports and Integrations**: Private plan permissions apply only inside OnePlan and are not enforced in external reports or integrations. Organizations can filter private plans by plan type to build separate datasets and adjust integrations to meet their requirements.



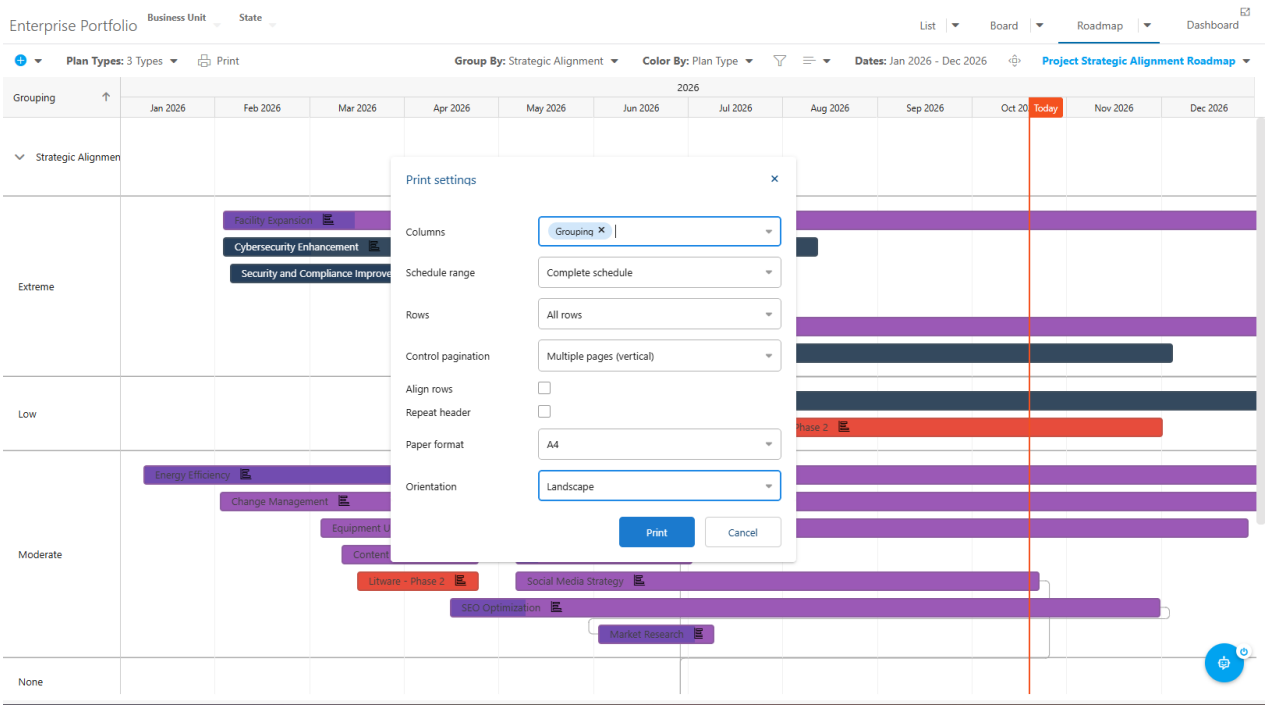
Automations

- **Copy and Create Plans with Hierarchy**: The Copy Plan and Create Plan automation actions carry over the source plan's hierarchy to the new plan.
- **Ready Where You Expect It**: New plans appear in the same hierarchy locations as the source plan, so teams can pick up the work without reorganizing.



Roadmap Printing

- **Print on Demand**: Roadmaps can be printed at any time, so teams can share timelines in meetings, reviews, and offline discussions.
- **Your Views, Your Way**: Printed roadmaps use the views you've created, keeping the layout, filters, and focus you've already set up.

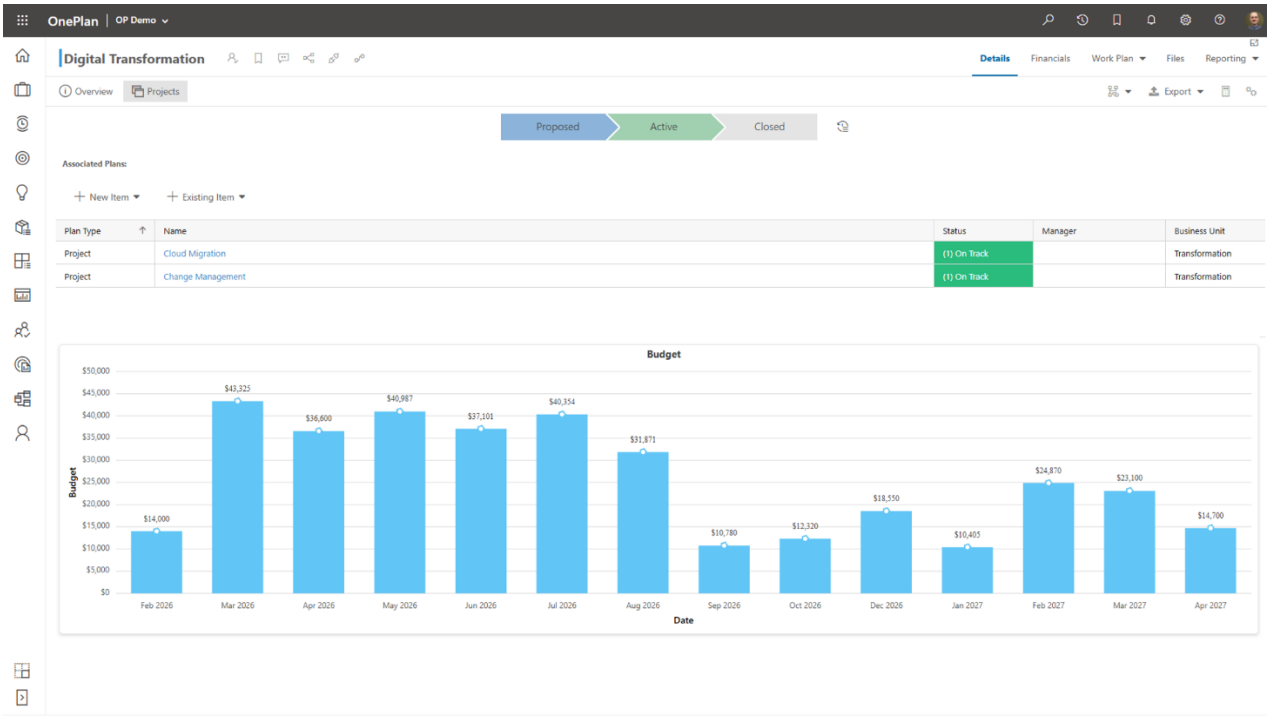


Plan Details

Summary: Plan detail pages become richer and more visual. Teams can add dashboard widgets alongside plan information and include the charts in exports, while configurable hyperlink icons make linked resources more recognizable from the portfolio list.

Dashboard Widgets Section on Plan Detail Pages

- **Visual Plan Insights**: Add the widgets used in dashboards directly to plan detail pages to see charts alongside plan information.
- **Broad Data Coverage**: Widgets support work item, plan, financial plan, and resource plan data.
- **Export-Ready Charts**: Charts are included when plan detail pages are exported, so shared plans carry the full picture.



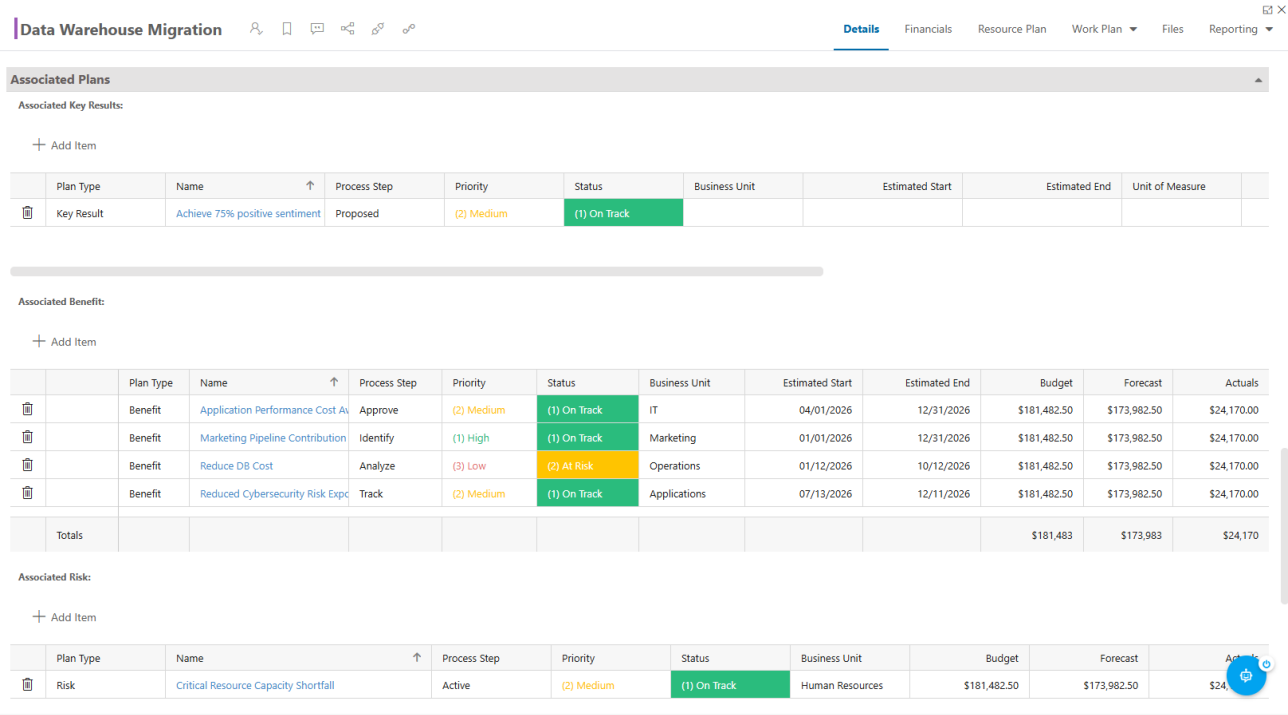
Configurable Icon URL for Hyperlink Fields

- **Recognizable Links**: Plan-level and task-level hyperlink fields can have a configurable icon. When an icon URL is set, the portfolio list displays that icon as the link to the field's URL.
- **Cleaner Portfolio Lists**: Icons give portfolio lists a compact, visual way to reach related sites and documents.

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Plan Detail Tables

- **Refreshed Experience**: Detail tables have an updated design that makes them faster and more natural to work with.
- **Formatting and Totals Together**: Formatting rules and totals work together in detail tables, so key values stand out while summary figures stay in view.



Business Rules for Plan Detail Pages

- **Personalized Pages**: Business rules can be applied to plan detail pages, so each page adapts to the person viewing it, the plan's data, or its current process step.
- **Right Information at the Right Time**: Teams see the fields and sections that matter for their role and stage, keeping plan detail pages focused and relevant.

Split Fields

- **Unified Configuration**: Split fields are configured within Multi Lookup Field configuration, keeping related setup in one place. Existing split field definitions carry over automatically.
- **Split Data Across More Views**: Split data appears in Child Plan Tables, the Portfolio List, Roadmap, and Board views, giving teams a consistent picture wherever they review plans.

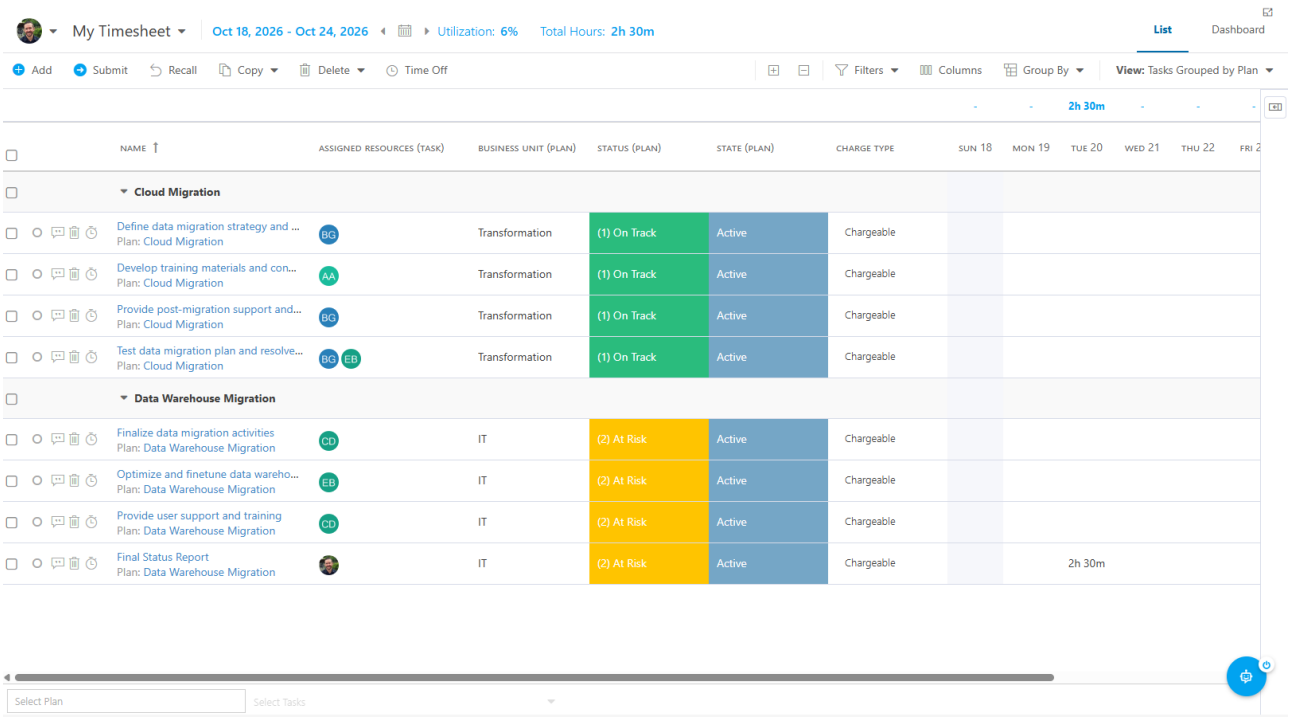
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Timesheets

Summary: Timesheets support personal and global views, so each person can work the way they prefer while the organization keeps consistent views available to everyone.

Timesheet Views

- **Personal Views**: Create and save your own timesheet views to focus on the work and details that matter most to you.
- **Global Views**: Save views for the whole organization, giving teams a consistent starting point for entering and reviewing time.

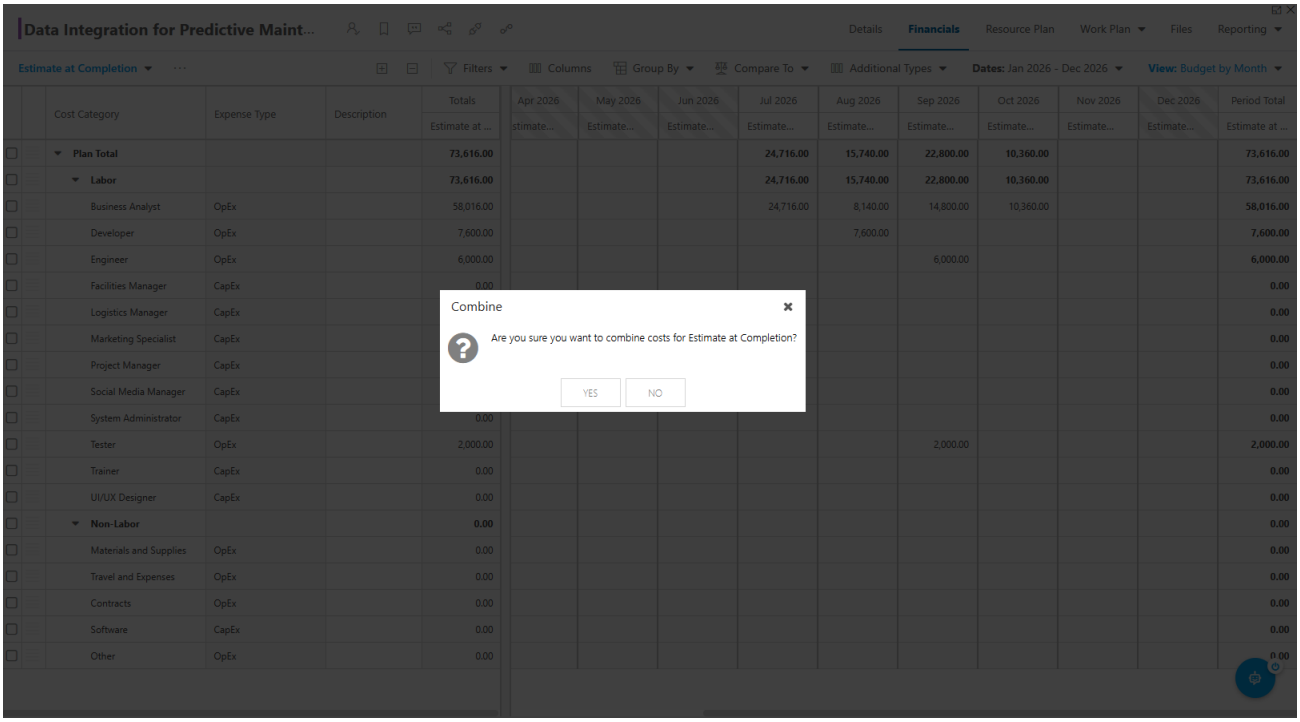


Financial Plan

Summary: Combined Cost Types can be refreshed on demand from any plan, giving financial teams up-to-date combined figures whenever they need them.

Combined Cost Types On Demand

- **Combine Costs on Demand**: Organizations configured with Combined Cost Types can use the Combine Costs option under Import Costs in any financial plan to bring in combined figures when they need them.
- **Rebuild Anytime**: Combine Costs rebuilds Combined Cost Types whether or not they have already been triggered, so plan figures reflect the latest data.

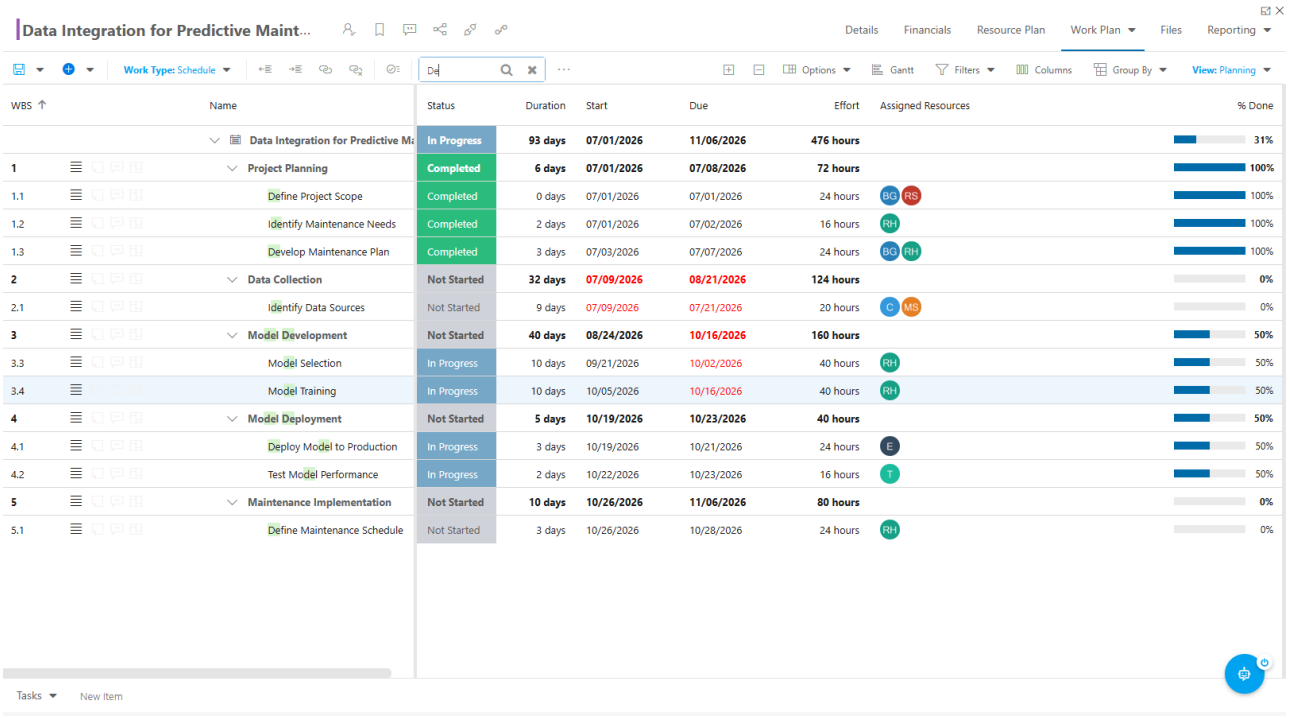


Work Plan

Summary: Work item search helps teams find what they need quickly in large work plans.

Work Item Search

- **Find Work Fast**: Search across all work items in the work plan to quickly narrow the list to the items that match.
- **Focused Review**: Filtered results make it easier to assess progress and take action on specific work without scrolling through the full plan.



WBS	Name	Status	Duration	Start	Due	Effort	Assigned Resources	% Done
	Data Integration for Predictive Ma	In Progress	93 days	07/01/2026	11/06/2026	476 hours		31%
1	Project Planning	Completed	6 days	07/01/2026	07/08/2026	72 hours		100%
1.1	Define Project Scope	Completed	0 days	07/01/2026	07/01/2026	24 hours	BG RS	100%
1.2	Identify Maintenance Needs	Completed	2 days	07/01/2026	07/02/2026	16 hours	RH	100%
1.3	Develop Maintenance Plan	Completed	3 days	07/03/2026	07/07/2026	24 hours	BG RH	100%
2	Data Collection	Not Started	32 days	07/09/2026	08/21/2026	124 hours		0%
2.1	Identify Data Sources	Not Started	9 days	07/09/2026	07/21/2026	20 hours	C MS	0%
3	Model Development	Not Started	40 days	08/24/2026	10/16/2026	160 hours		50%
3.3	Model Selection	In Progress	10 days	09/21/2026	10/02/2026	40 hours	RH	50%
3.4	Model Training	In Progress	10 days	10/05/2026	10/16/2026	40 hours	RH	50%
4	Model Deployment	Not Started	5 days	10/19/2026	10/23/2026	40 hours		50%
4.1	Deploy Model to Production	In Progress	3 days	10/19/2026	10/21/2026	24 hours	E	50%
4.2	Test Model Performance	In Progress	2 days	10/22/2026	10/23/2026	16 hours	T	50%
5	Maintenance Implementation	Not Started	10 days	10/26/2026	11/06/2026	80 hours		0%
5.1	Define Maintenance Schedule	Not Started	3 days	10/26/2026	10/28/2026	24 hours	RH	0%

Dashboards

Summary: Dashboards bring together data from a plan and its associated plans, giving teams a connected view of related work in one place. Plan-level dashboards gain widgets built for plan data, so stakeholders can see how linked initiatives contribute to shared goals.

Associated Plan Data

- **Connected Plan Insights**: Dashboards can use associated plans as a data source, bringing related initiatives into a single view.
- **Flexible Data Scope**: When working with plan-level data, users choose whether to show only the current plan or include its associated plans as well.

Widgets on the Plan Level

- **Plan-Level Widgets**: Dashboards created on the plan level support widgets for plan-level data, keeping reporting focused on the plan in context.
- **Associated Plan Reporting**: Pair plan-level widgets with associated plan data to show how related plans contribute to the bigger picture.

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Status Reports

Summary: Status reports become a more flexible and visual communication tool. Organizations can tailor reports to different audiences with dedicated pages and enrich them with dashboard widgets, field sets, and trend fields, all included in exports. Design versioning ensures every submitted report keeps the layout it was submitted with, preserving a reliable historical record.

Versioning of the Status Report Design

- **Preserved Report History**: When a status report is submitted after its design has changed, OnePlan saves a version of that design. Submitted reports keep the design they were created with.
- **Freedom to Evolve**: Teams can refine status report designs at any time with confidence that past submissions stay intact.

Dedicated Status Report Pages

- **Audience-Specific Views**: Status reports support pages, similar to the pages in plan details. Each page can show a different set of fields, so one report can serve executives, sponsors, and delivery teams.
- **Page-Level Export**: Each page exports on its own, making it simple to share the right view with the right audience.

Dashboard Widgets Section in Status Reports

- **Visual Status Updates**: Add the widgets used in dashboards directly to status reports to bring charts and visuals into every update.
- **Broad Data Coverage**: Widgets support work item, plan, financial plan, and resource plan data.
- **Export-Ready Charts**: Charts are included when status reports are exported, so shared reports carry the full picture.

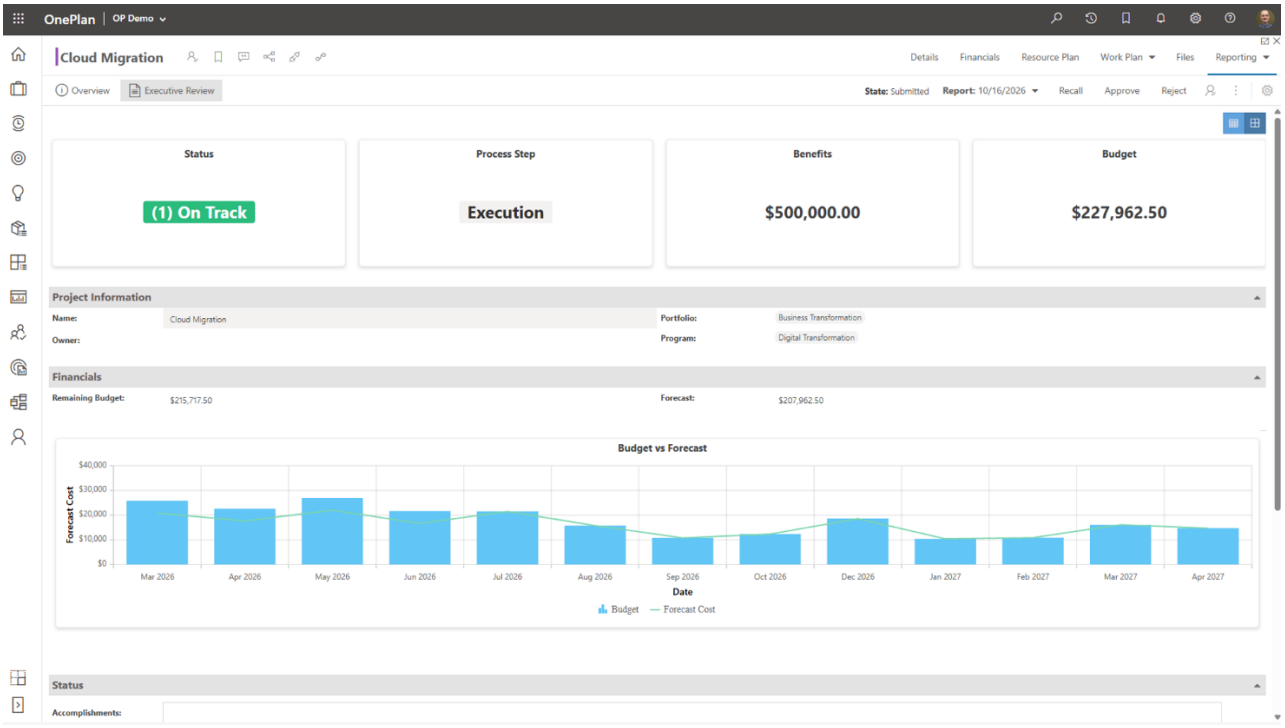
Field Sets on Status Reports

- **Consistent Presentation**: Status reports display field sets the same way dashboards do, giving users a familiar layout across reporting views.
- **Organized Information**: Grouped fields make status reports quicker to scan and understand.

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Trend Fields in Status Reports

- **Direction at a Glance**: Status reports support trend fields, helping readers see how key measures are moving over time.
- **Included in Exports**: Trend fields appear in exported status reports, keeping shared updates complete.



Mobile App

Summary: OnePlan Mobile runs on a new, modern platform that is faster, more stable, and more secure. Home, My Work, Timesheets, Time Off, Conversations, and Notifications keep the same familiar look, with smoother sessions, threaded conversations, and clearer guidance throughout the app.

Modern Mobile Platform

- **Quick First Sign-In**: After updating, select your region and sign in once as usual.
- **Stay Signed In**: Sessions renew automatically in the background, so you can keep working without interruption.
- **Clear Status Messages**: The app lets you know whether you are offline, the service is temporarily unavailable, or your session has ended.
- **Helpful Empty Screens**: Each screen lets you know when there is nothing to show yet.

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Threaded Conversations

- **Full Comment Threads**: Open a complete comment thread and reply to individual comments.
- **Consistent Task Comments**: Task comments use the same threaded view, keeping discussions easy to follow.

Accessibility and Security

- **Screen Reader Support**: Icon buttons include screen reader labels, making the app more accessible to everyone.
- **Secure Sessions**: Your session is kept in the device's secure storage, and signing out clears it completely.

Multi-Language Support

Summary: OnePlan now supports Portuguese, with most menus, labels, messages, and features translated to provide a more localized user experience. Translation coverage will continue to expand in future releases.

- **Native Portuguese**: OnePlan supports Portuguese, with most menus, labels, messages, and feature names translated.
- **Growing Coverage**: Portuguese translation coverage continues to expand in future releases.

Platform Administration

Summary: Authentication keys include expiry dates and granular scopes, giving administrators more control over how integrations access OnePlan data. Existing keys continue to work as they do today. Native Portuguese support helps Portuguese-speaking teams work in their own language.

Authentication Keys

- **Expiry Dates**: Authentication keys can include an expiry date, supporting regular key rotation and stronger security practices.
- **Granular Scopes**: Scope each key to OData, backup, or API access, with API access defined by main entities such as plans and resources and by create, read, update, or delete permissions.
- **Seamless Continuity**: Existing authentication keys are set to never expire and include all scopes, so current integrations keep running without changes.

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Performance Enhancements

Summary: The Azure DevOps integration has been upgraded to use the OneConnect 2.1 connector infrastructure. This update moves Azure DevOps to the latest OneConnect architecture, running on the newest Microsoft Azure hardware and software services. The Microsoft Project Connector also synchronizes calendars more efficiently, speeding up publishing for organizations with many calendars.

Azure DevOps Integration Infrastructure Upgrade

- **Performance Upgrade**: Users will see improved performance and reliability for large data, while maintaining existing configurations and behavior.
- **Note:** that this change does not apply to legacy Azure DevOps Epic and Teams Project integrations. This upgrade will impact the IP address range for the processing of Azure DevOps integrations. Customers who restrict Azure DevOps access through IP rules must update their configurations to allow traffic from the new IP range. Please open a ticket to obtain the new IP range.

Microsoft Project Connector Calendar Synchronization

- **Faster Calendar Sync**: The Microsoft Project Connector synchronizes calendars more efficiently when publishing data to OnePlan.
- **Built for Scale**: Organizations with a large number of calendars or calendar entries benefit most, with quicker publishing as their schedules grow.

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