



Task Manager Release Notes

PV660 SV102

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Release PV660 SV102

The theme of this release is v8 compatibility.

Prerequisites

- This solution is compatible with OneStream Platform v8.
- Review the information in this section before you install, deploy, or upgrade. OneStream strongly recommends that you upgrade in a Development environment before upgrading in the Production application.
- **Compatibility:** Use OneStream platform version 6.6.0 or later with this version of Task Manager.
- **Deployment:** This release supports an overinstall; however, OneStream strongly recommends an Uninstall UI instead.

New

None

Enhancements

None

Fixed Issues

- When you upload a Close Date template, if the combined value of the WF Time Name and Close Day column data is a duplicate, it will not cause an error. (MP1-1395)
- The Complete button is available for tasks in a Not Started state. (MP1-4665)
- Email notifications for upcoming and past due tasks are sent to the identified recipients as well as their child groups. (MP1-4683)

- Notifications can be set up by the administrator for notifications based on actions and both upcoming and past due tasks. (MP1-4682)

The following table describes the email notifications that are sent based on actions.

Notifications (Action Based)

Action	Recipient	Additional Comments
Recalled	Preparer	If Preparer is Unassigned, the notification is sent to all users in the Preparer Group. If there is no Preparer Group assigned, no one receives a notification.
Rejected	Preparer	If Preparer is Unassigned, the notification is sent to all users in the Preparer Group. If there is no Preparer Group assigned, no one receives a notification.
Prepared	Approver 1	If Approver 1 is Unassigned, the notification is sent to all users in the Approver Group. If there is no Approver Group assigned, no one receives a notification.
Approved	Send to the next Approver	For example, if Approver 1 approves the task, then Approver 2 receives a notification. If any Approver role is Unassigned, the notification is sent to all

Action	Recipient	Additional Comments
		users in the Approver Group. If there is no Approver Group assigned, no one receives a notification.
Unapproved	Send to the previous Approver	For example, if Approver 2 unapproved the task, then Approver 1 receives a notification. If any Approver role is Unassigned, the notification is sent to all users in the Approver Group. If there is no Approver Group assigned, no one receives a notification.

The following table describes the email notifications that are sent for both upcoming and past due tasks.

Notifications (Upcoming and Past Due)

Timing	Recipient	Additional Comments
Upcoming Due	Preparer	If Preparer is Unassigned, the notification is sent to all users in the Preparer Group. If there is no Preparer Group assigned, no one receives a notification.

Timing	Recipient	Additional Comments
Past Due	Preparer and Approvers 1–4	<p>If Preparer is Unassigned, the notification is sent to all users in the Preparer Group. If there is no Preparer Group assigned, no one receives a notification.</p> <p>If any of the Approver 1–4 roles is Unassigned, the Approver Group is notified in addition to any other primary approvers assigned to the task. For example, if a task has three approval levels and Approver 1 and Approver 2 are Unassigned, but Approver 3 has an assigned user, the Approver Group and Approver 3 receive a notification. If there is no Approver Group assigned, no one receives a notification.</p>

Known Issues

None

Contacting Support

OneStream Support can be contacted at any time by registering at <http://support.onestreamsoftware.com> and then emailing support@onestreamsoftware.com.

Release PV660 SV101

The theme of this release is defect resolution.

Prerequisites

Review the information in this section before you install, deploy, or upgrade. OneStream strongly recommends that you upgrade in a Development environment before upgrading in the Production application.

Compatibility

Use OneStream platform version 6.6.0 or later with this version of Task Manager.

Deployment

This release supports an overinstall, however, OneStream strongly recommends an Uninstall UI instead.

New

None

Changed

None

Fixed

- When you refresh the screen on the Task Grid View page, all the dates display correctly and remain static. (MP1-4565)

Release PV660 SV100

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

Prerequisites

Review the information in this section before you install, deploy, or upgrade. OneStream strongly recommends that you upgrade in a Development environment before upgrading in the Production application.

Compatibility

Use OneStream platform version 6.6.0 or later with this version of Task Manager.

Deployment

This release supports an overinstall, however, OneStream strongly recommends an Uninstall UI instead.

New

- On the Task Grid View page, administrators can view and take action on all tasks, including those for personal task groups. On the Task Administration page, a column for the Local Admin role is included. For Local Admins, the default value is the first of the platform security groups that they are part of that was also assigned to the Security Role [Manage Task Administration] in Global Options. For administrators and users creating personal task groups, the default value is (Unassigned). (MP1-4265)
- On the Scorecard or Task Grid, when you drill down to view details about multiple tasks, Approvers 1–4 display so that you can view the users assigned to those tasks. (MP1-4219)
- A column for the Local Admin role is included in the import template. You can only assign security groups selected in the Security Role [Manage Task Administration] drop-down menu on the Global Options page to the Local Admin role. (MP1-3840)
- In Global Options, administrators can select the Task Administration Expanded Access option to enable users in the Manage Task Administration security role to access the Categories and Instructions settings to add, edit, and delete items. (MP1-3826)

- In Global Options, administrators can multi-select platform security groups to assign to the Security Role [Manage Task Administration]. (MP1-3824)
- On the Task Administration page, if a Local Admin is a member of the security group assigned in the Local Admin field for a task group, they can manage that task group and the tasks within them. (MP1-3822)
- Administrators, preparers, and approvers can forward tasks to roles at or below their own security role for a given task to move tasks to individuals that have more capacity to increase efficiency. For example, Approver 4 can forward any of the Approver or Preparer roles, and Approver 3 can forward Approver 1–3 and Preparer roles. (MP1-3760)
- Each user can have only one security role on a task. Administrators will receive an error message if they try to assign multiple security roles to the same username. (MP1-3726)
- A user cannot perform more than one security role on a single task in a specific time period due to segregation of duties. (MP1-3725)
- On the Task Administration page, columns are included for Local Admin, Viewer Group, and Approver 2–4 roles. For clarity, the column that was previously Approver is changed to Approver 1. (MP1-3724)
- Upon migration when you upgrade Task Manager, the Approval Levels field is set to 1 for tasks that had a user assigned as an Approver and 0 for tasks that had (Not Required) assigned as an Approver. (MP1-3659)
- The import template includes columns that display Approvers 1–4 and Approval Levels so that administrators can update tasks with multiple approvers. (MP1-3638)
- Security works in an "order of operations" or cascading approach, meaning a user can take action on a task equal to or below their assigned role. For example, if you are assigned as Approver 2, you could approve the task at level 2 or level 1 or prepare the task. (MP1-3635)
- The import template includes a column for the Viewer Group role. You cannot edit dependencies, tasks, or task groups that you do not have access to. (MP1-3632)
- The role of Viewer Group is available to give view-only access for tasks that are related to Task Groups that are set to Private access. A user with this group can view tasks but cannot take action on tasks. (MP1-3599)
- You can use multiple levels of approvals to indicate a higher level of review for tasks that are more critical. (MP1-2864)

- New columns are added in the Task Detail Grid, Analysis tab, and multi-select grid: Prepared Date (replaces Completed Date column), Prepared By, Approved Date, and Approved By. When a Prepared task is Recalled, the Prepared By and Prepared Date are reset. When a Prepared or Approved task is Rejected, the Prepared By, Prepared Date, Approved By, and Approved Date are all reset. (MP1-3689, MP1-4230)
- An Approval Level column was added to the Task Grid View page, Scorecard Drill Down Grid page, and Analysis Explorer Pivot page that displays the number of approvals needed before a task is fully approved. (MP1-4159)
- On the Task Grid View page, when Local Admins select Administrator in the Role drop-down menu, all the tasks they are associated with and have the ability to take action on will be displayed. (MP1-4254)

Changed

- On the Task View Grid page, the View Type drop-down menu is removed. Use the Role drop-down menu to identify the administrator, preparer, and approval roles, which removes the redundancy and improves performance when selecting individual tasks. (MP1-3401, MP1-3386)
- You can view the changes made to a task in a workflow period in the History section of the Task Grid View and Task Gantt View pages, which includes the action, state, user that made the update, time of update, and details. A migration path enables you to view the History information in this format. (MP1-3661, MP1-4237)
- On the Task Administration page, you can multi-select tasks in a task group to delete or edit. (MP1-837, MP1-3810)
- In Global Options, the Mass Updates options is removed. (MP1-3810)
- In Global Options, the Allow Private Task Groups setting is renamed to Allow Personal Task Groups. If you turn off the Allow Personal Task Groups setting, in the Task Groups pane and Task Group Copy dialog box, only public and private tasks will display. Any existing personal tasks will change to private tasks. Appendix C is added to the user guide with information on how different users are affected when this setting is turned on or off. (MP1-3807, MP1-4253)

- In the Copy Task dialog box, administrators can select which roles to update from the group that they are copying from. In the Copy Group dialog box, an Overwrite User Roles option enables you to overwrite all security user roles for all tasks in the new task group. This is an all or nothing option. Either all security roles stay the same or they are all overwritten with the users displayed in the Copy Group dialog box. (MP1-4210)
- In the Copy Group and Copy Task dialog boxes, you can assign Approvers 1-4. In the Copy Group dialog box, the New Owner drop-down menu is renamed Access. (MP1-4046)
- Instructions assigned to a task or task group within the Task Administration Page, regardless if it is published or not, cannot be deleted. (MP1-4192)
- The Task Edit dialog box includes a Validation section that displays errors. (MP1-4162)
- Email notifications for coming and past due tasks are sent to all primary users. If there are no primary preparers or approvers assigned, the notifications will be sent to the Preparer Group or Approver Group. Appendix D is added to the user guide with more information on notifications. (MP1-3640)
- Completed status is changed to Prepared state throughout the solution. (MP1-4178)
- Task Grid View page is updated with these changes in the status summary (MP1-4234):
 - Tasks is changed to Total.
 - % Completed is changed to % Done.
 - The status summary includes these categories: Not Started, In Process, Rejected, Prepared, Partially Approved, and Fully Approved.
 - Fully Approved includes tasks that are prepared, but do not have any approval requirements.
- When you select a task on the Task Grid View page, the status summary for that task is updated with these changes (MP1-4173):
 - Status is changed to Preparation.
 - % Completed is changed to % Prepared.
 - The Approval field displays either the number of approvals that have been completed out of the total required or Not Required

- On the Dependency tab for a task:
 - The dependency tree displays the approval state and the approval levels for each task.
 - The dependency table includes columns for Approval Level and for Approvers 1–4.
 - The dependency table indicates any roles that were forwarded to a different user with (Fwd) after the username.
- Scorecard is updated with these changes (MP1-4236, MP1-4158):
 - Completed status is changed to Prepared state.
 - Preparation Status chart is changed to a pie chart with these statuses: Not Started, In Process, Blocked by Dependent, Prepared, and Rejected.
 - Partially Approved status is added and Approved status is changed to Fully Approved.
 - Approval Status chart includes these statuses: Unapproved, Partially Approved, Fully Approved, and Not Required.
 - Drill down from the Scorecard opens tasks related to the state selected.

Fixed

- If you are setting the Action Type on a task to Open Workflow and you want the task to go to Fully Approved after the workflow is completed, set the Approval Levels field to 0. Otherwise, the task will require approval even after the workflow is completed. (MP1-4360)
- On the Task Administration page, when an administrator creates a new task group, they must enter a unique name for the task group. If either no name or a duplicate name is entered, an error message will prompt them to enter a unique name. (MP1-2798)
- When you change the frequency setting of a task, the task is only visible in the months that align with the updated frequency selection. (MP1-4369)