Task Manager Release Notes

PV630 SV100

Task Manager Release PV6.3.0 SV100

The themes of this release are:

- Automatic notifications for tasks coming due or past due

- Ability to send notification emails to individual preparers and approvers

- Inclusion of comments in forwarded notification emails

- Usability improvements

Release Date

March 16, 2021

Deployment

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

- Use OneStream platform version 6.3.0 or later with this version of Task Manager.

New Features and Enhancements

- Task Manager includes two new Task Scheduler sequences called **PastDueTask Notifications_UTM** and **UpcomingTaskNotifications_UTM**. You can use these sequences in a task's schedule to create automatic notifications for upcoming and past due tasks. Note that the OneStream Task Scheduler is only available in the OneStream Windows application and not the Silverlight version. You are encouraged to use the Windows application when you upgrade. (3697, MP-2635)

- You can assign individual preparers and approvers to a task. If a primary preparer or approver is assigned to a task, the task's notifications only go to that primary preparer or approver, not to all individuals in the preparer group or approver group. Task details in the Tasks pane in Task Administration display the Preparer and Approver columns (25852, MP-3380).

- Task comments are included in forwarded emails (21043, MP-2633).

Changed

- When setting up the task lists in Task Manager, the Work Day has been expanded from a listed range to any enterable numerical range, with validated entries. In addition, the Workday Start value can be a negative or positive value. (11018, MP-2632)

- The Completed date for completed Open Workflow type tasks accurately reflects the time stamp of when the workflow was completed rather than the UTM sync time. (24399, MP-2634)

Fixed

- When exporting the Task Groups/Task Items, the columns for the task item's **NotificationType** and **ActionType** have correct text within XFT named ranges. (22698, MP-2624)

- Exporting and re-importing tasks that have the Approver set to **(Not Required)** does not cause an error during re-import. (22700, MP-2625)

- Documents for a task with an action type of **Doc Mgmt** open correctly in the File Viewer. (23190, MP-2626)

- The task due date calculates properly within the Grid View when the **Due Date Method** setting in Global Options is set to **Derived**. (24415, M-2630)

- If uploading a task instructions file where the file name contains a restricted character(s), the restricted character(s) are stripped from the file name before being added to the list of task instructions. This results in a file name that is different than the file name of the source instruction file that was uploaded. (23637, MP-2628)

- Any task with an action type of **No Action** that does not require an approver can be approved or rejected by the task Preparer or Administrator after it has been completed. (24062, MP-2629)

- Task lists can be imported using the import template even when the Category fields are blank. (26451, MP-3872)

Known Issues

- Task Manager is incompatible with and cannot be used on applications with a custom weekly time profile (11677).

Contacting Support

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

Task Manager Release PV610 SV100

The themes of this release are incremental improvements, including adding attachments and descriptions to tasks, adding attachment history, and bulk task updating, as well as other usability improvements.

Release Date

August 5, 2020

Deployment

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

- The minimum OneStream XF platform version to use with this version of Task Manager is 6.1.0 or higher.

New

- Task Attachments (10018, 16323)

    - Add attachments to any tasks as supporting documents.

    - The Attachment History pane lists any attachments that are part of the task's history.

    - Listed attachments have individual time stamps.

- Task Bulk Updates (19727, 7175)

    - All task Grid views include a selection column that indicates the selected tasks and permits bulk selection of all tasks in the grid.

- ○ All Grid views in Task Manager allow the selection of multiple items (tasks) with simultaneous updating, providing a significant increase in efficiency when working with large numbers of items.

- ○ Selecting multiple tasks in any Grid View displays the Bulk Update Menu Bar, containing options to recall, complete, reject, and approve or disapprove the selected tasks en masse.

- Scorecard UI Improvements (10917) such as a new icon-only toolbar.

- Grid View Column Reordering (9111, 13009, 13236, 17150)

  - ○ Drag and drop column headings in any task grid to reorder columns. A selected column header shows an orange background for easy recognition and tracking when you drag the column.

  - ○ Task Manager now retains all column reordering and filtering changes in both grids and lists through all Task Manager sessions, or until they are changed.

- Task Descriptions (10755)

  - ○ Administrators can now add descriptions to tasks that are viewable during task setup.

- Edit and save comments when in the same role used to create the original. Administrators and Approvers can edit their own comments until the task is Approved. Preparers can edit their own comments until the task is Completed. (9666)

Changed

- Tasks with dependencies now display those dependencies in a Tree View pane next to the Dependent Task pane. The Tree View pane clearly displays the relationships between a task's dependencies as well as the task dependency hierarchy. (8780).

- Custom or Open Dashboard task types now open the related dashboard in a new tab, providing for independent work between the task and the opened dashboard. (10959).

- Deleting a task group displays a message confirming deletion of the group and all published task history, and shows the number of tasks, task instances, and number of time periods impacted by the deletion of task historical items. (10411)

Fixed

- The days late calculation is now correct when UTC time goes to the next day. (17448)

- When selecting a task with dependent tasks in the Task Gantt View, the task details now display the Dependents, Forward, and Instructions buttons. (18475, 18476, 18488)

- Status change notification emails now have correct subject titles. (18491)

Task Manager Release PV440 SV202

The themes of this release are minor defect resolution and user improvement features.

Release Date

July 22, 2019

Deployment

- This release supports an overinstall of solution version PV440 SV201.

- The minimum OneStream XF platform version to use with this version of Task Manager is 4.4.0 or higher.

New

- An alternative Simplified view Scorecard can be optionally displayed via a User Preference setting. (12309)

Changed

- The UTM_ParamHelper Business Rule was updated to remove a duplicate GetSessionStateValue section. (10991)

- A Dependent Tasks column was added to the Analysis - Explorer Pivot grid. (11112)

Fixed

- Task Dependencies were duplicating Task relationships upon importing. (11305)

Task Manager Release PV440 SV200

The theme of this release is incremental improvements including a revamped Scorecard and a new Grid View to view and work on Tasks, Task Instructions, and additional Task actions. See the Instructions document for relevant implementation details.

Release Date

February 15, 2019

Deployment

- This version requires an Uninstall UI (under Settings/Uninstall) of the previous version prior to installing. This will remove the prior user interface artifacts in preparation for loading the new solution.

- Database schema update will be handled upon first use when upgrading to this version.

- The minimum OneStream XF platform version to use with this version of Task Manager is 4.4.0 or higher.

New

- A new Task Grid View is available for Preparers and Approvers to view several Tasks in a grid. This allows for better filtering and quicker navigation across Tasks and Task Groups. The Task details display on the bottom-half of the screen when a Task is selected to provide instance details. The Scorecard's Task Details dialog and the Task Gantt View page were also enhanced to have the Task details appear on the bottom-half of the screen. (9250)

- Task instructions can be assigned to single Tasks or a Task Group. Preparers and Approvers can view and download the Task instructions. (4966)

- The Task Details dialog now includes a History section. The History will reflect when Tasks are created, when a Task status has changed, when a Task is forwarded, or when Tasks are published. (9250)

- User Preferences

  - Users can assign the default Start Page that is presented to them when Task Manager is accessed via OnePlace. The start page options are: Task Analysis, Task Grid View, and Task Gantt View.

  - A Task Status Sync Type preference allows users to determine when Task syncing occurs for Custom, Workflow, and Dependent Group Task types. (9547, 10270)

  - A daylight savings offset is now available under User Preferences. By selecting the Daylight Savings checkbox, Tasks times will appear adjusted to reflect the daylight savings offsets for the selected User Time over any given year. If this checkbox is not selected, then Tasks times will not display as adjusted for daylight savings. (6823)

Changed

- Task Analysis Scorecard and Analysis pages (8748)

  - The Scorecard was updated with new charts to better reflect Task timeliness, preparation and approval statuses.

  - The Distribution by Work Day and the Timeliness Trend (for admins) information was moved to the Scorecard.

  - The Responsibility grid was removed and replaced with the Explorer Pivot grid. The Explorer Pivot reflects more Task details and can be filtered and exported.

- Task Status and Actions (9702, 9245, 7176)

  - A Task with a status of Not Started can be set to a Completed status without first having to move to an In Process status. (9245)

  - A Task with a status of In Process can be set to a Not Started status.

- A Task with the status of Completed can be set to an In Process status using the Recall action. Recall was added to the Task instance email notification settings under Task Administration.

- A Rejected Task can be set to a Completed status without first having to move to an In Process status.

- A Task with the status of Approved can be set to a Completed status with the Unapprove action.

- The In Process icon has been renamed to Start.

- Task Filter Menu Bar

   - A User filter was added for administrators to be able to see Task status down to the individual level. The User filter is available when the View filter is set to As Admin. (8748)

   - Additional entries of Preparer/Preparer Group and Approver/Approver Group were added to the Role filter to view Tasks that are accessible via a Group assignment. (9699)

   - The Category filter results will now be limited to categories assigned to Tasks the user has access to. When the Group filter is changed, the Category filters will reset to (All). (6867)

   - The Task order was changed to start with Time and then Task Group. (9691)

- Task Forwarding

   - When a Task is forwarded, the Preparer Group and Approver Group assignments will not change. Previously, when a Task was forwarded the Preparer and Approver Groups would change to Unassigned. (9686)

   - Tasks forward indicators have been added as columns in the Task Grid View. (9686)

   - When a Task is forwarded, a Task Forwarded Successful message will appear. (7994)

- The Task Manager import process was enhanced for better validation and error processing when importing any Task or Task Settings data. (8074)

    - The system will only import one worksheet at a time.

    - When there are multiple worksheets in a template the administrator will be prompted to select which worksheet to import.

    - If the import process encounters an error, no data from the worksheet will be imported and the errors will be written to a text file that is accessible in the user's File Explorer import folder.

- Approvers can now add comments to Tasks that they are assigned to regardless of status. (7865)

- The segregation of duties that currently exists for approving Tasks is now also applied to rejecting Tasks. If a user completes a Task, that same user cannot reject that Task. (9698)

- Completed Date, Start Date, and Task Forward indicators for Preparers and Approvers were added as additional columns to all Task grids. (9121)

- A vertical scroll bar was added to the Task Add and Edit dialogs to improve accessibility of the Task fields when the screen resolution is zoomed in. (7752)

- Decimals were removed from the Task Group completion percentages. (8075)

- Updated various interface formatting and text. (8086, 8115)

Fixed

- A formatting issue was causing failures when importing the Task Close Date template. (8301)

- An issue was causing inconsistencies when viewing Task Dependencies in the Task Detail page versus the Task Gantt View page. (8661)

- Apostrophes were being allowed in the Task Name when Importing which was causing an error. (8802)

Task Manager Release PV440 SV101

The theme of this release is incremental improvements including, additional Global Options, User Preference time settings, and Task dependencies at a Task Group level. See Instructions document for relevant implementation details.

Release Date

August 14, 2018

Deployment

- This version requires an Uninstall UI (under Settings) of previous version prior to installing. This will remove the prior user interface artifacts in preparation of loading the new solution.

- Database schema update will be handled upon first use.

- Minimum OneStream XF platform version to use this version of Task Manager is now 4.4.0 or higher.

New

- Dependencies

  - Tasks can now be made dependent on the completion of a specific Task(s) or all Tasks in a Task Group. This dependency can be set using the Action Type of Dependent Group within a Task Definition. (4620, 8007)

  - Task Dependencies among tasks in a single Task Group can be imported using a new tab on the Excel-based Task Import Template. (6451)

- Close Dates

- The Close Date can now be updated to reflect a workday value of one instead of day zero. This can be controlled via the Global Option – Close Has Zero Day when the Due Date Method is set to Derived. The default setting is set to Yes, or the first day of the close is day zero. If this setting is changed to No after Task Definitions have already been created, then a Mass Update is needed to change the value and potentially that of the Duration for these Task Definitions. Tasks must be republished to change all existing Task Instances with a zero workday to a workday value of one. (4473)

  - Close Dates can now be imported or exported into Task Manager. An Excel template is provided to import and can be assessed under Settings – Close Dates. (8039)

- Holiday Profiles

  - Holiday Profiles can now be imported and exported from a provided Excel template. (5432)

  - Task durations can now be extended or shifted if the Task End Date falls on a holiday. The behavior can be set under Global Options – Holiday Offset Method. (8033)

- The Task Scorecard can now be based off a user's defined time zone instead of UTC. This setting can be made under Settings - User Preferences – User Time and are available for all UTM users. (8014)

- The Task Viewer Page will now be based on the users' computer's time instead of UTC. (6465, 6466)

- Access to the Task Administration page can now be limited to administrators only. This can be controlled via the Global Options – Allow Private Task Groups. If the setting is set to Yes then any user can access the Task Administration page. If set to No then access is limited to those administrators in the Security Role [Manage Task Setup] group only. Previously created private groups are not affected by this change. (7166)

- Four new reports were added and can be accessed under the Task Analysis page. (6450)

Changed

- The ability to filter users in the Preparer and Approver lists was added to the Task Details – Forward dialog. (6862)

- The Excel-based Task Import Template was updated to reflect the accurate Work Day, Work Hour, and Duration Hours that are available in the Task Administration Task Groups (7554)

- The Excel-based Task Import Template was updated to reflect a range of -31 to 31 for Workday Start and 1 to 24 for Workhour Start. (7554)

- Two color coding changes have been made to icons in the Task Details dialog. If a comment has been added to a Task Instance, the Comment icon will have red accents and if a Dependent has been added to a Task Instance, the icon will have green accents. (6863)

- The Task Time filters on the Task Scorecard and Task Viewer pages have been updated to match the Close Date's Workflow time frequency. (8045)

- The Private list option was added to the New Owner list when copying Task Groups. (8047)

- When deleting a Task Group, the system will now check to see if there are associated Task Instances. It will prompt a message confirming to delete the Task Group warning of the deletion of these Task Instances. (8053, 6632)

- Apostrophes are no longer accepted in the Task Name field. (7504)

- The Task Group level completion percentage on the Task Viewer Page was updated to reflect the total percentage complete. (6638)

- The Task Group Name and Workday Start have been added to all chart and graph drill down pivots. (3683, 6865)

- Corrected various interface formatting and misspellings. (7855, 4792)

- The filters on the Task Scorecard were changed to update the charts and graphs when viewing as an administrator. (7022)

Fixed

- Task Definitions with the same name in different Task Groups can now be updated on an import. (7521)

- In Task Administration, if the Task Duration is set in minutes and saved, it is now displayed properly in the grid on this page. (7555)

- Task Instances with a status of Inprocess are now being properly filtered. (7909)

- Forwarding Tasks to a Preparer or an Approver was not being allowed for Administrators. (8250)

- When a Task Group is renamed but is referenced in a Task Action Type of Dependent Group in a different Task Definition, the Action Parameters of the Dependent Group were not getting updated. (8055)

Task Manager Release PV430 SV100

The theme of this release is incremental improvements, automation of Task status gathering through custom Dashboards, usability for maintaining and building out Task Groups and Task Definitions and additional Task Categories. See Instructions document for relevant implementation details.

Release Date

March 26, 2018

Deployment

- Can install this solution on top of existing Task Manager deployment. Database schema update will be handled upon first use.

- Global Options are now backed up and restored as part of the schema update. (6443)

New

- Now able to export a selected Task Group and all of its related Task Definitions to CSV file for manipulation and later import as an Excel file once Named Ranges are added. Excel import template provided for additional way to import Task Groups and Task Definitions. (3685)

- Task Category has been expanded into Category 1, Category 2 and Category 3 to provide further classification of Tasks. Changes made to Task Categories setup, Task Editor and various Dashboard filters and reports to accommodate. Updated Task Editor entry and update screens to move Add or Update up to the header to free up room for Categories. (4894, 4999, 5560)

- New Task Action Type of Custom Task allows the relationship of a Task Definition with a custom-made Dashboard. Option to include a function which can automatically update status of related Task upon reviewing the Task Scorecard, Task Details or a Gantt Chart (Task Viewer) where this Task is listed.

Changed

- Updated Task screens and Dashboards to be clear as to time zone being used to calculate Task start and end date and time. (6468)

- When the Task Scorecard page is opened, Tasks which are automatically updated on the Gantt view or Task Details pages now update. (6459)

Fixed

- Improved handling of user names with non-valid system characters when managing files. (6236)

- Remedied a few typos in the solution.

Task Manager Release PV410 SV100

The theme of this release is initial solution launch.

Release Date

August 14, 2017

Deployment

Initial release

New

None.

Changed

None.

Fixed

None.

Contacting Support

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