



Task Analytics Embedded Content Block Guide

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Overview

As part of Financial Close, the Task Analytics Embedded Content Block provides an integrated view into Task Manager, enabling you to complete the following activities:

- Monitor workflow task activity
- Analyze status distribution
- Drill into task details in a single unified analytics experience

This Content Block provides configurable visualizations of task data. In Genesis Designer, designers and administrators control which data is displayed in Genesis Navigation for end users.

This guide provides the dependencies and prerequisites and outlines how to set up and configure the Content Block in Genesis Designer as well as how to view the content in Genesis Navigation.

Dependencies

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 2.0.0 is required.
- Minimum Task Manager PV9.0.0 SV1.0.0 is required.

Prerequisites

Before using the Task Analytics Embedded Content Block, review the security requirements, and ensure that the Time POV is set.

IMPORTANT: If the Time POV is not set, the Content Block may display inaccurate or unexpected results because all analytics components rely on the resolved time context.

Security Requirements

- To install Genesis or import Content Blocks, you must meet one of the following requirements:
 - You must be a member of the system security group Administrator.
 - You must be a member of the group assigned to the application security role `AdministerApplication` and the group assigned to the application user interface role `ApplicationLoadExtractPage`.
- To inject Content Blocks, you must be a member of the group assigned to the application security role `ManageApplicationWorkspaces`.
- To have the option to enable the Admin view on the Content tab in Genesis Designer and Genesis Navigation, you must be in the Solution Administration Group, which is set on the Global Options tab of the Settings page in Task Manager.

Set Up Time Point of View (POV)

1. In OneStream, select the **Point of View (POV)** icon.
2. Select **TIME**.
3. From the **CUBE** drop-down menu, select the cube.
4. From the **DIMENSION** drop-down menu, select **Time - Time**.
5. On the **HIERARCHY** tab, next to the year, expand the nodes until the months display.
6. Select the month, then select the **SAVE** button.
7. Confirm that the Time POV is set.

Set Up the Content Block

Follow these steps to set up the Content Block:

1. [Install Genesis](#).
2. [Enable Library Service or Import the Content Block](#).

Install Genesis

These are installation instructions to set up Genesis in an application that does not have it installed.

IMPORTANT: Loading a Genesis package or Workspace file into an application that already has a Workspace with the same name will result in overrides, which could render the Workspace unusable.

1. Go to OneStream [Solution Exchange](#).
2. In the top navigation menu, go to **PLATFORM > Genesis**.
3. On the **Genesis** page, from the **Download Genesis Package** drop-down menus, select the appropriate platform version and the most recent Genesis version.
4. Select the **DOWNLOAD** button to download the Genesis solution.
5. Log in to OneStream Desktop.
6. On the **Application** tab, go to **Tools > Load/Extract**.
7. On the **Load** tab, use the **Select File** buttons to locate the solution package.

Set Up the Content Block

8. Select **Open**.
9. Select **OK** to complete the installation.
10. After Genesis loads, the following dashboard profiles will display in **Dashboards**:
 - **Genesis Designer**: On this page, you can configure Content Blocks.
 - **Genesis Navigation**: On this page, you can view the content that was configured in Genesis Designer.

Enable Library Service or Import the Content Block

From Genesis Designer, you can automatically connect to a live exchange store that gives you access to an up-to-date library of Content Blocks. This Library Service is available for cloud environments. Enable Library Service to use this live exchange store. You do not need to download and import the Content Blocks. To enable Library Service, follow these instructions:

1. Log in to OneStream.
2. Go to **Dashboards > Genesis Designer > Genesis Designer > Settings > Library Management**.
3. Select the **SETTINGS** tab.
4. Under **Enable the Library Service**, select the **Yes** radio button.

For on-premises environments and for instances that have the Library Service turned off, follow these instructions to download and import Content Blocks from OneStream Solution Exchange.

Set Up the Content Block

1. Go to OneStream [Solution Exchange](#).
2. In the top navigation menu, go to **PLATFORM > Genesis**.
3. On the **Genesis** page, under **Content Blocks**, find the Content Block and select the **VIEW MORE** button.
4. From the drop-down menus, select the appropriate platform, Genesis, and Content Block versions.
5. Select the **DOWNLOAD** button to download the Content Block.
6. Log in to OneStream.
7. Go to **Dashboards > Genesis Designer > Genesis Designer > Settings > Library Management**.
8. Select the **IMPORT** tab.
9. Select the import method.
 - Select Merge to:
 - Add new imported items to the library.
 - Update existing items to the imported items.
 - Keep current items that are not in the imported library.
 - Select Replace to replace the current library with the imported library. All current library items will be deleted, and all imported library items will be added.
10. Select the **Import** button.
11. Select the Content Block package.
12. Select the **Open** button.

Configure the Content Block in Genesis Designer

The Task Analytics Embedded Content Block supports filtering, widget configuration, and role-based perspectives to customize the experience to different users.

This Content Block provides read-only analytics configured in Task Manager. To configure data in Task Manager, see the *Task Manager Guide*.

Follow these instructions to inject the Content Block into a Page in Navigation. The Content Block must be injected into a Page for it to be visible in Genesis Navigation for end users.

NOTE: Alternatively, you can inject the Content Block in Content Management using the Inject Content Block icon, then add it to a Page in Navigation using the Link an Existing Content Item from a Shared Workspace icon. See the *Genesis Guide*.

1. Go to **Dashboards > Genesis Designer > Genesis Designer > Designer Home > Navigation**.
2. Select the **New Navigation Group** icon.



3. In the **Property Editor** slide-out panel, complete the following fields:

Configure the Content Block in Genesis Designer


- **Navigation Group:** Enter a new name, which will be used as an internal identifier for the Navigation Group.
- **Description:** Enter a description, which will display as the name in the navigation bar.

4. Select the **Save** button.
5. In the navigation tree, select the Navigation Group.
6. Click the **New Page** icon.



7. In the **Property Editor** slide-out panel, complete the following fields:
 - **Page:** Enter a new name, which will be used as an internal identifier for the Page.
 - **Description:** Enter a description, which will display as the name in the page bar.
8. Select the **Save** button.
9. In the navigation tree, select the Page.
10. Select the **Inject a New Basic Library Content Item** icon.

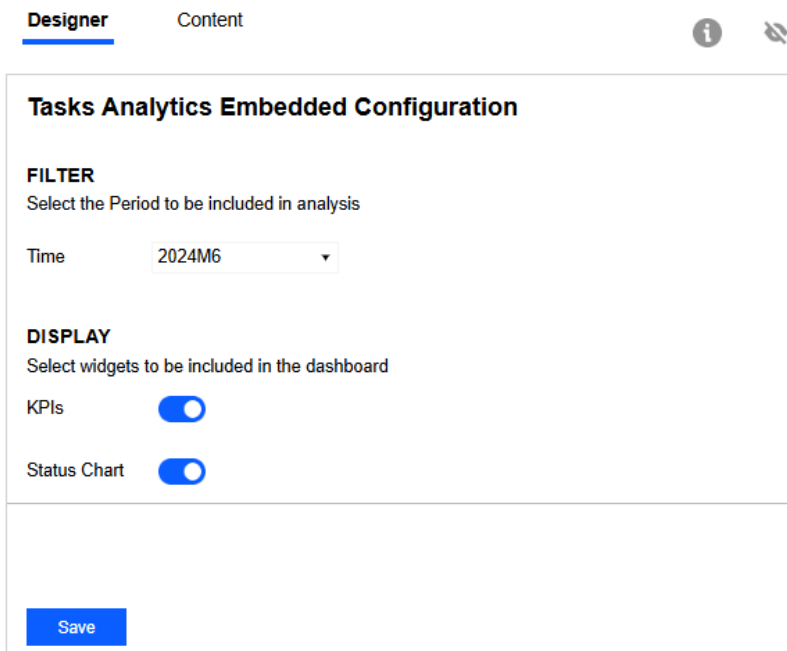


11. In the **Content Library** slide-out panel, search for the **Task Analytics Embedded Content** Block, and select the **Add this Content Package**  icon next to it.
12. In the navigation tree, select the Task Analytics Embedded Content Block.

- On the Designer tab, you can configure the Content Block. See [Designer Tab](#).
- On the Content tab, you can preview the content that end users will view. See [Content Tab](#).

Designer Tab

1. Select the **Designer** tab.



The screenshot shows the 'Designer' tab selected in a navigation bar. The main content area is titled 'Tasks Analytics Embedded Configuration'. It is divided into two sections: 'FILTER' and 'DISPLAY'. The 'FILTER' section has a sub-header 'Select the Period to be included in analysis' and a 'Time' dropdown menu currently set to '2024M6'. The 'DISPLAY' section has a sub-header 'Select widgets to be included in the dashboard' and two toggle switches: 'KPIs' and 'Status Chart', both of which are turned on. A blue 'Save' button is located at the bottom left of the configuration box.

2. Select the filter to customize the time period for the data that displays in Genesis Navigation. Under **FILTER**, the **Time** drop-down menu displays. Select an option:
 - **Workflow Time**: Uses analytics from the time set in OneStream Workflow
 - **POV Time**: Uses analytics from the time set in OneStream Time POV
 - **Specific year and month**: Uses analytics from the selected time

Configure the Content Block in Genesis Designer

IMPORTANT: If the Time POV is not set, the Content Block may display inaccurate or unexpected results because all analytics components rely on the resolved time context. See [Set Up Time Point of View \(POV\)](#).

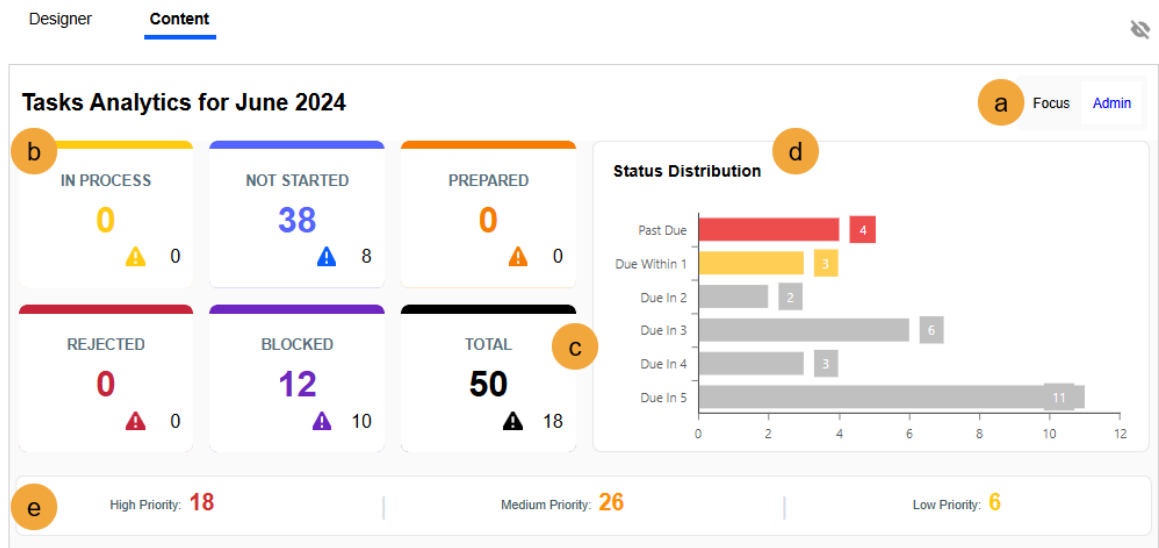
3. Choose the widgets to display in Genesis Navigation. Under **DISPLAY**, you can select the following options:
 - **KPIs:** Displays key performance indicators (KPIs) as a grid of cards with the number of tasks in each state for the selected time range. In Genesis Navigation, users can select each card to view detailed information.
 - **Status Chart:** Displays a bar chart with the number of tasks based on due date. In Genesis Navigation, users can select the bars to view details.

NOTE: You can select both KPI cards and the status chart, but you must select at least one option.

4. Select the **Save** button.

Content Tab

1. Select the **Content** tab to see how the content will display for end users on Genesis Navigation.



- a. **Focus Admin toggle:** To view this feature, you must be in the Solution Administration Group, which is set on the Global Options tab of the Settings page in Task Manager.
 - **Focus:** Displays task statistics related to the current user. Users without Task Manager administrator privileges will always be in this mode.
 - **Admin:** Displays application-wide task statistics based on the Administrator role. This is the default selection for Task Manager administrators.

The selected mode is saved across sessions when you log out and log back in. Task Manager administrators can update the setting as needed.

Configure the Content Block in Genesis Designer

- b. **State KPI card:** This feature displays if the KPIs option is selected on the Designer tab.

Select the numbers on these cards to open the Task Details slide-out panel and view details about the tasks in the selected state. Then select a task to drill down further into the data.

The number of high priority items in each state is listed in the lower right of each card.

NOTE: If only the KPIs option is selected on the Designer tab, the cards will display in a single row.

- c. **TOTAL KPI card:** This feature displays if the KPIs option is selected on the Designer tab.

In addition to the features on the state KPI cards, select the number on the TOTAL KPI card to open the Task Manager slide-out panel and view more information on Analysis, Task Grid, Gantt View, and Administration pages.

- d. **Status Distribution bar chart:** This feature displays if Status Chart is selected on the Designer tab.

Select the bars to open the Task Details slide-out panel and view details about the tasks with the selected due date. Then select a task to drill down further into the data.

- e. **Priority row:** Select the numbers to open the Task Details slide-out panel to view details about the tasks at each priority level. Then select a task to drill down further into the data.

2. Select the number in the TOTAL KPI card to view more details.

NOTE: This feature displays if the KPIs option is selected on the Designer tab.

Configure the Content Block in Genesis Designer

The screenshot shows the Task Manager interface with the following components and callouts:

- a:** Navigation icons for Analysis, Task Grid, Gantt View, and Administration.
- b:** Filter dropdowns for Role (Administrator), Group ((All)), Category 1 ((All)), Category 2 ((All)), and Category 3 ((All)).
- c:** Summary statistics: Total: 50, Not Started: 50, Prepared: 0, % Done: 0%, In Process: 0, Partially Approved: 0, Past Due: 4, Rejected: 0, Fully Approved: 0, and a Refresh button.
- d:** Task details pane for "Close Meeting with Accounting Team", showing Description, Assignment (Preparer, Approver, Viewer), Action Type (No Action), and Action Parameters (Task has no action).
- e:** Settings gear icon.
- f:** Help question mark icon.

State	State Text	Approval Level	Task Group	Task	Description	Action Type	Priority
Not Started	Not Started	0 of 1	Financial Close E...	Close Meeting wi...	Conf room 867-5309 - review c...	No Action	Medium
Not Started	Not Started	0 of 1	Financial Close A...	Close Meeting wi...	Conf room 867-5309 - review c...	No Action	Medium
Not Started	Not Started	0 of 1	Financial Close A...	Close General Le...	Automated alert from GL close ...	No Action	High
Not Started	Not Started	0 of 1	Budget	Review Current ...	Review current variances withi...	Open Workflow	Low
Not Started	Not Started	0 of 1	Forecast 6p6	Review Current ...	Review current variances withi...	Open Workflow	Low
Blocked by Depe...	Blocked by Depe...	0 of 1	Financial Close A...	Automated ERP I...	Automated import notification	No Action	High
Blocked by Depe...	Blocked by Depe...	0 of 1	Financial Close E...	Automated ERP I...	Automated import notification	No Action	High
Not Started	Not Started	0 of 1	Budget	Budget Assumpti...	Review and adjust current assu...	Open Workflow	High
Not Started	Not Started	0 of 1	Forecast 6p6	Forecast 6p6 Ass...	Review and adjust current assu...	Open Workflow	High
Not Started	Not Started	0 of 2	Strategic Plan	Update Drivers	Adjust driver selections and val...	Open Workflow	Medium
Not Started	Not Started	0 of 1	Financial Close F...	Enter Current De	Input information on current a	No Action	Low

- Analysis, Task Grid, Gantt View, and Administration pages:** In the solution navigation, select these pages to view detailed information. Then, on the Task Grid, Gantt View, and Administration pages, select a task or task group to drill down further into the data.
- Filters:** Use filters to refine the displayed list. For Role, Administrator is selected by default for Task Manager administrators, and All is selected by default for all other users.
- Task summary:** View a summary of information about the task states and due dates.
- Task pane:** Select a task in the grid to populate the bottom half of the page with more details.
- Show Settings Page icon:** Select to access the Task Manager Settings page.
- Show Help Page icon:** Select to access the Task Manager documentation.

View Content in Genesis Navigation

To view the content on a Page that has the Task Analytics Embedded Content Block injected, follow these instructions:

1. Go to **Dashboards > Genesis Navigation > Genesis Navigation**.
2. On the left panel, from the drop-down menu, select the Application Group. The associated Navigation Groups will be listed in the navigation bar below.
3. Select the Navigation Group.
4. If multiple Pages are listed, select the Page to view the associated content.
5. Select the options to view the full scope of content. For details about the available options for this Content Block, see [Content Tab](#).

Release PV9.0.0 GV2.0.0 BV1.0.0

This is the initial release of the Task Analytics Embedded Content Block.

Compatibility

- Minimum Platform Version 9.0.0 is required. OneStream recommends upgrading to the latest platform version.
- Minimum Genesis Version 2.0.0 is required.
- Minimum Task Manager PV9.0.0 SV1.0.0 is required.

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)