



Task Manager Release Notes

PV800 SV100

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Release PV800 SV100

The theme of this release is improved efficiency and auditability for Administrators, Preparers, and Approvers along with bug fixes.

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.
- Upgrade to UTM PV660 SV102 before upgrading to any UTM 8.X version.
- **Compatibility:** Use OneStream Platform version 8.0.0 or later with this version of Task Manager.

New Features

- Administrators can set reason codes when rejecting a task on the Task Manager Settings page. (MP1-4966)
- Administrators can add or delete reason codes and mark them as either active or inactive. At least one reason code must remain active. Duplicate reason codes cannot be added. Editing a reason code does not affect the prior version of the reason code that was applied to a task. (MP1-4961)
- When you reject a task, you must select a reason code and optionally add reason text to explain why it was rejected. If populated, the history section for the task will display the reason code and reason text. (MP1-4944)

Enhancements

- On the Task Administration page, administrators can select multiple Task Groups. (MP1-4936)

- Administrators can export multiple Task Groups from the Task Administration page. The Excel file includes all Task Groups, Tasks, and Task Dependencies. (MP1-4938)
- Administrators can publish multiple Task Groups at the same time from the Task Administration page. (MP1-4940)
- The Description field is visible on the Task Grid and other areas the Task Grid can be viewed. The Task Group column now automatically defaults to display before the Task column. (MP1-4932)
- Administrators, Approvers, and Preparers can forward multiple tasks from the Task Grid. When multiple tasks are selected to be forwarded, the details button is still accessible for more information about the selected tasks. (MP1-4934)
- A single email notification is sent when a Preparer or Approver forwards multiple tasks. The email contains a table with columns for Group Name, Task Name, Description, Preparation Status, Preparation User, Approval Status, and Approval User. (MP1-4942)
- When a task status is changed a Task Status email notification is sent to the assigned Preparer or Approver user identifying the Group Name, Task Name, Description, Preparation Status, Preparation User, Approval Status, and Approval User. If the Task is not assigned to a user, the email notification is sent to the designated Preparer and Approver groups. (MP1-5013)
- The Task Dependency Inquiry Message email includes Group Name, Task Name, Description, Start Date, Due Date, Days Until Due and Days Past Due for the Parent Task Information. Dependent Task Information includes Group Name, Task Name, Description, Due Date, Days Until Due, Days Past Due, Preparation Status, Preparation User, Approval Status and Approval User. The email notification is sent to the designated Preparer group if a task is not assigned to a user. (MP1-5014)
- A Description column is included in Upcoming and Past Due email notifications. A single email notification is sent for multiple past due or upcoming Tasks. If a user is not assigned to an upcoming or past due task, the email notification is sent to the designated Preparer or Approver groups. (MP1-4953)
- A Cancel button was added to the Global Options and User Preferences pages next to Save. Select the Cancel button to revert all changes back to the last saved settings. Background color to the icon bar was updated for subpages: Close Dates, Categories, Instructions and Holiday Profiles. (MP1-4988)
- The solution version is in the lower left corner on the *Task Manager Guide*. (MP1-4986)

- User interface updated on the Task Manager navigation pane and Analysis, Task Grid, Gantt View and Administration pages. (MP1-4990, 4984, 5112)
- Holiday Profile Name field cannot be left blank. (MP1-5041)

Fixed Issues

- Dependency changes are enabled for Not Started and In Process statuses when you select Publish or Merge. (MP1-4786)
- If you delete a task or groups from the Task Administration page, the instructions will not be deleted from task instances. After you delete a task from the Task Administration page, the published task instance retains the instructions document. (MP1-4710)
- If you delete a task that is a dependency of one or more other tasks, it will delete the selected task and all related dependencies. (MP1-4958)
- If a published task was deleted on the Task Administration page you can still view attachments. (MP1-3381)
- Task comments only display in the period in which the task was created in the All Commentary report. (MP1-4735)
- Character limit expanded for the Prepared By column. (MP1-4607)
- Inactive users will not receive email notifications. (MP1-4580)
- Task import template has been updated with correct notification type values. (MP1-4593)
- When notifications are not set to "None" and no email connection is configured, users receive an error message. (MP1-4929)

Known Issues

None

Contact Support

Contact OneStream Support by registering at:

[Support - OneStream Software](#)