



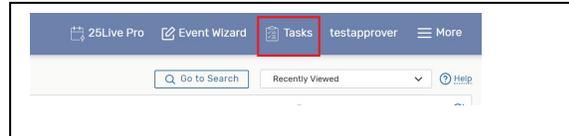
Completing Tasks – Workflow in 25live

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Within 25live tasks are used to automate approval and advisories. In order to maintain scheduling authority, tasks are necessary for a well-functioning 25live ecosystem. Below I will demonstrate one method to complete them.

Tasks are assigned either by the user (requirements/notifications) or to security groups (assignment policy for locations and resources). They may optionally be delivered via email as well: please inquire with your administrator if you would like a change.

First, log into 25live Pro using your university credentials. Once authenticated, browse to tasks on the top menu bar.



This will take you to the tasks search.

Select Object: Tasks Outstanding

Outstanding

Reset Search

List Calendar

Choose Columns Create "To Do" Task

Event	Title	Task Item	Type	Status	Actions	Respond By	First Date	Reference	Assigned By	Assigned To	Scheduler
Student technology orientation		BCB1 A142A-A142B	Assign	In Progress		Wed Aug 07 2019	Thu Aug 08 2019	2019-AAAKRM	Gonzalez, Ana	You	Gonzalez, Ana
Test Workflow		Order Tablecloths	To Do	In Progress		Thu Aug 08 2019	Fri Aug 09 2019	2019-AAAAFX	testapprover	You	testuser
UIWSOM GSA	UIWSOM GSA September meeting	2 assignment requests for BCB2 A3130	Assign	In Progress		Thu Aug 08 2019	Thu Sep 05 2019	2019-AAAKQH	Hogan, Mary	You	Hogan, Mary

The task item is named after object being requested, locations in this example. With the information available, you will likely need more. Click on the event name to enter the event details view. Further in the screenshot below, you'll see what happens when you click into the Tasks header in the details.

The screenshot shows the 'Task List' tab for a confirmed event 'Test Workflow' (ID: 2019-AAAAFX) on Fri Aug 09 2019 4:00 pm - 5:00 pm. The view is set to 'All Assigned Tasks'. The table below shows the task list:

Task Item	Type	Status	Actions	Respond By	First Date	Assigned To	Comments
Order Tablecloths	Public	In Progress	Complete, Ignore	Thu Aug 08 2019	Fri Aug 09 2019	You	
BCB1 A142A	Assign	Assigned	none	Mon Aug 05 2019	Fri Aug 09 2019	You and Bingham, Rachel; Gahan, Emma;	
BCB1 A142B	Assign	Denied	none	Mon Aug 05 2019	Fri Aug 09 2019	You and Bingham, Rachel; Gahan, Emma;	No way!

Buttons at the bottom: Approve Checked, Deny Checked.

From here you may take action, whether that be completing or denying. Please give the requestor an explanation via the 'More Actions' >Email Event Details in 25live if they request is denied or the assignment offered (Screenshot below).

The screenshot shows the 'More Actions' dropdown menu for a task. The 'Email Event Details' option is highlighted with a red arrow.

Actions	Respond By	First Date
Complete, Ignore	Thu Aug 08 2019	Fri Aug 09 2019
none	Mon Aug 05 2019	Fri Aug 09 2019
none	Mon Aug 05 2019	Fri Aug 09 2019

More Actions menu items: Add to Favorites, Edit Event, Copy Event, Manage Related Events, Manage Bindings, Create 'To Do' Task, Email Event Details, Print a Report for this Event.

Once you have completed the workflow, you may also alter the event state to be 'Confirmed' if all is set up for the event. You may need to hold back on the confirmed state until all workflow is completed for more complex requests.

Tips:

- Workflow is shared, so working out a process with others in your security group is critical
- Workflow is generated at the time of the event submittal, so if a new approver is added to your security group, they will not get the retroactive workflow.
- If you are not ready to approve a request, you may alter the respond by date to initialize the workflow at a future date. (Screenshot to the right)

The screenshot shows the task list with a red box highlighting the 'Respond By' date for the 'Assigned' task, which is 'Mon Aug 05 2019'.

Status	Actions	Respond By	First Date	Assigned To
In Progress	Complete, Ignore	Thu Aug 08 2019	Fri Aug 09 2019	You
Assigned	none	Mon Aug 05 2019	Fri Aug 09 2019	You and Bingham, Rachel; Gahan, Emma;
Denied	none	Mon Aug 05 2019	Fri Aug 09 2019	You and Bingham, Rachel; Gahan, Emma;

- Outstanding Workflow/Tasks are those 30 days in the future and the past that have not been responded to.
- There is an advanced Task search from the tasks view. If you need to review tasks for another user, this will allow you to query for any tasks in the system.

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