

Assignment Policy and Workflow

It is important to have a basic understanding of how location security is assigned and who has an item added to their workflow (task list).

	Assign, Unassign, Approve <i>Select All</i>	Assign, Unassign <i>Select All</i>	Request, Unassign <i>Select All</i>	Request <i>Select All</i>
AS-Dept-KnightWriting	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
AS-Dept-LRC	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
AS-Dept-MATH	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
AS-Dept-MUSIC	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AS-Dept-PSYCH_SOC	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
AS-Dept-PerfMediaArts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
AS-Dept-SocForHumanities	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
AS-Scheduling	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Each location has at least one security group assigned with the security group with approve rights will have an item added to their task list when the location is *requested*. Additional security groups may be given assign rights only. Members of security groups with assign rights will be able to complete

the location request but the event will not appear in their task list. If a member of the specified location approve or assign security group selects a location while creating or editing an event, no task is created - because it's not a request, it's an assignment. Schedulers from other areas can request and unassign the location, general requestors can only request.

Activity 4A

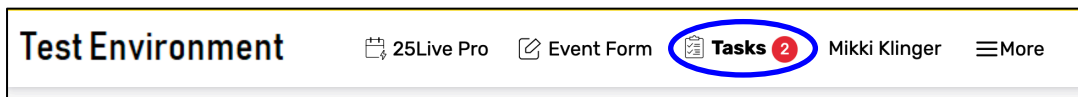
Create a new event. This time assign a location that is **not** in your assignment - in a location identified by the scheduler you paired with at Monday's review session.

1. Create an event with the following attributes
 - a. Create a repeating pattern for two weeks
 - b. Search for and select a location **outside** your assignment area (but schedulable by your "paired scheduler")
 - c. Set all **Event Activities and Features** items to "No"
 - d. Add a requirement / setup note
 - e. What should the event state be?
 - f. Send an email confirmation note

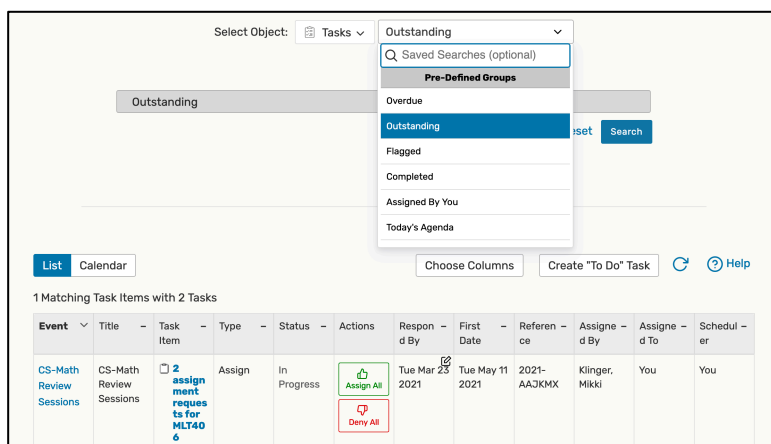
Tasks and Workflow

In the above activity (4A), you were asked to request a location *not* in your assignment area. Hopefully, your class "partner" also requested a location that was in your assignment area. If so⁵, you will have an item in your **Tasks**!

To view your tasks from any 25Live page, click on **Tasks** at the top of the page to the left of your name.



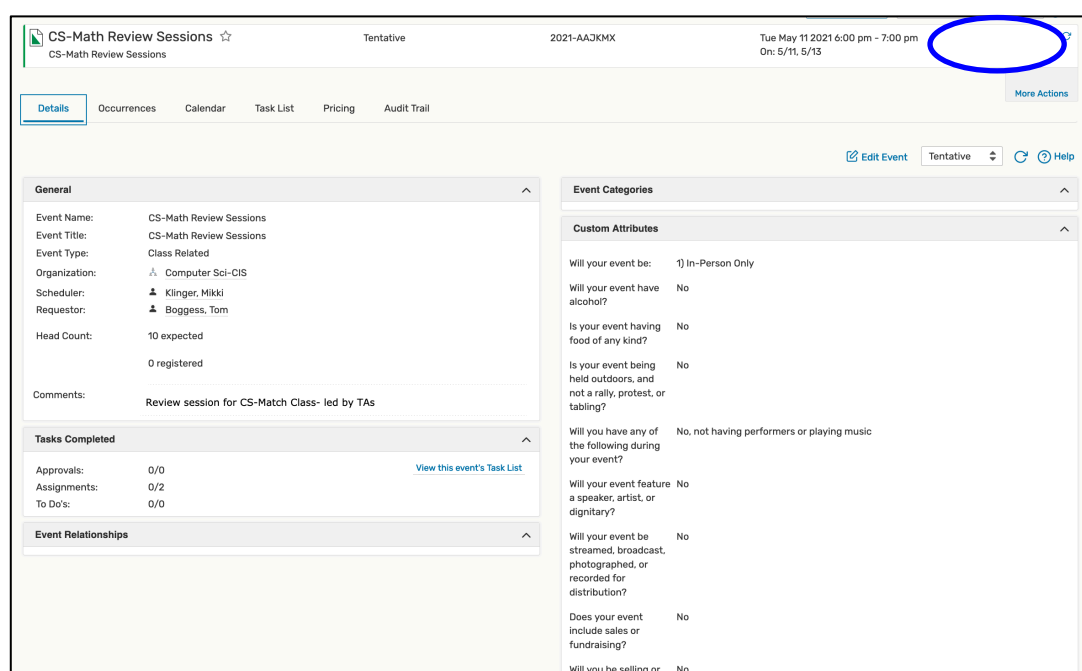
⁵ What would it mean if an event were requested in a location you can assign but it didn't show in your task list?



By default, **Outstanding** tasks will display, though other options are available.

You will be tempted to click on either **Assign** or **Deny** from this view. To do so precludes the possibility of seeing whether this event is ERP eligible or has other characteristics you may need to consider.

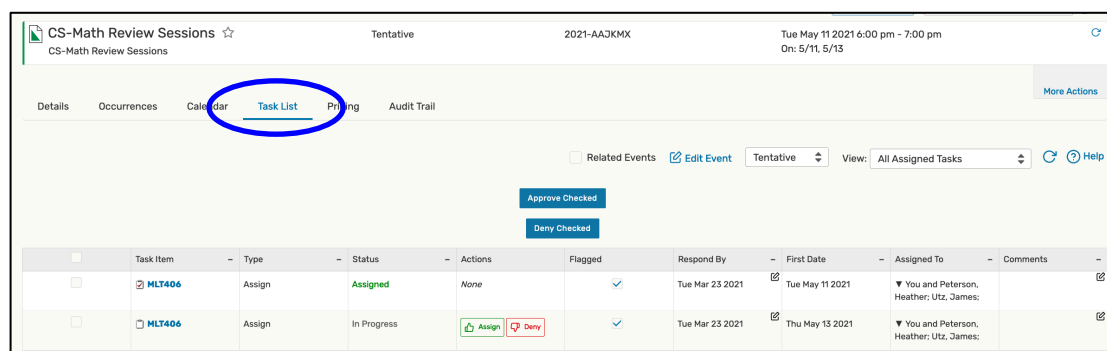
To view the event, click on the event name in the left column. The type of view displayed is based on the view you had opened last. If not on the details view, click **Details**



Note, no location has been assigned.

Click on the event **Task List** to review the location request (MLT406)

All of the **Event Activities and Features** or "Custom Attributes" were marked as No by the requestor, so you can go ahead and assign the Location.



The easiest method of assigning the requested Location is to return to the Event Task List and click **Assign** for the individual dates (or check the box in the header and click "Approve Checked").

25Live Pro
 Event Form
 Tasks 1
 Mikki Klinger
 More

If you assign the tasks individually, the task list number will be decremented.

CS-Math Review Sessions ☆

Tentative 2021-AAJMKX Tue May 11 2021 6:00 pm - 7:00 pm On: 5/11, 5/13 MLT406

Details Occurrences Calendar Task List Pricing Audit Trail More Actions

☐ Related Events [Edit Event](#) Tentative View: All Assigned Tasks [Refresh](#) [Help](#)

[Approve Checked](#)
[Deny Checked](#)

<input type="checkbox"/>	Task Item	Type	Status	Actions	Flagged	Respond By	First Date	Assigned To	Comments
<input type="checkbox"/>	MLT406	Assign	Assigned	None	<input checked="" type="checkbox"/>	Tue Mar 23 2021	Tue May 11 2021	▼ You and Peterson, Heather; Utz, James;	
<input type="checkbox"/>	MLT406	Assign	Assigned	None	<input checked="" type="checkbox"/>	Tue Mar 23 2021	Thu May 13 2021	▼ You and Peterson, Heather; Utz, James;	

Once the location has been assigned, the status and actions fields are updated and the location will show in the upper right once the page is refreshed (use the refresh icon [↻](#) to the right of the dates)⁶.

CS-Math Review Sessions ☆

Confirmed 2021-AAJMKX Tue May 11 2021 6:00 pm - 7:00 pm On: 5/11, 5/13

Details Occurrences Calendar Task List Pricing Audit Trail More Actions

☐ Related Events [Edit Event](#) Tentative Confirmed Cancelled View: All Assigned Tasks [Refresh](#) [Help](#)

Since there are no outstanding tasks to be completed, change the state from **Tentative** to **Confirmed**

Activity 4B

Complete the request made for your location.

1. Find and schedule the location for the event that included a requested location in your area
 - a. How did you find the event?
 - b. What method did you use to assign the location for this event?
 - c. What would you consider doing if you know there will be an event that will preclude the use of this location on a certain date?
 - d. What should the event state be? What if additional tasks were still in the list - especially those you cannot complete (such as an approval by Environmental Health and Safety)?
 - e. Send an email confirmation note to the requestor

⁶ Refreshing the page or its components may be necessary when things don't look quite right.