Assignment Policy and Workflow

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

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 only 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 a reservation (or assignment), not a request. 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 area - 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 scheduler setup note
   e. What should the event state be?
   f. Send an email confirmation note (to your partner)

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 so[5], you will have items in your **Tasks** list!

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


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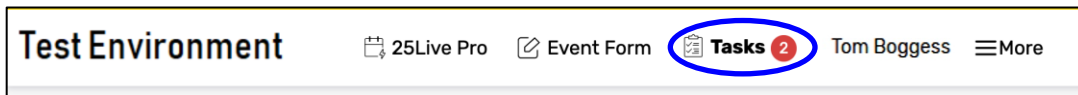
[5] What would it mean if an event were requested in a location you can assign but it didn't show in your task list?
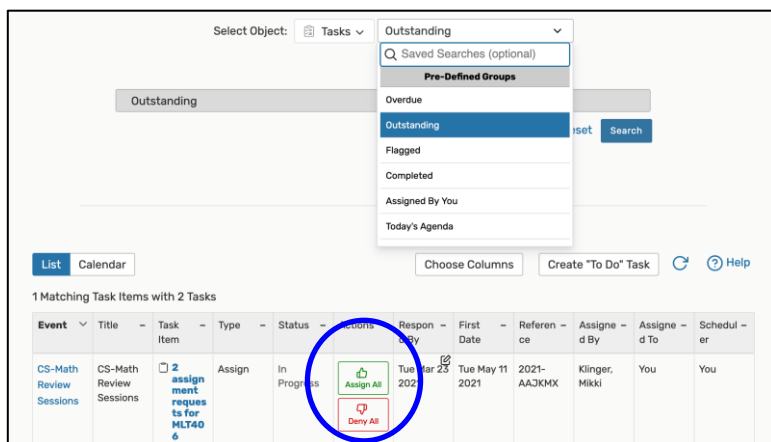
By default, **Outstanding** tasks will display.

You will be tempted to click on either **Assign** or **Deny** from this view. Please don't! Get in the habit of editing the event and assigning the location there. To select the thumbs up / down option will not update any resources that may need to be associated with this event. Further, without looking inside the event precludes the possibility of seeing whether this event needs additional approvals / tasks or has other characteristics you may need to consider.
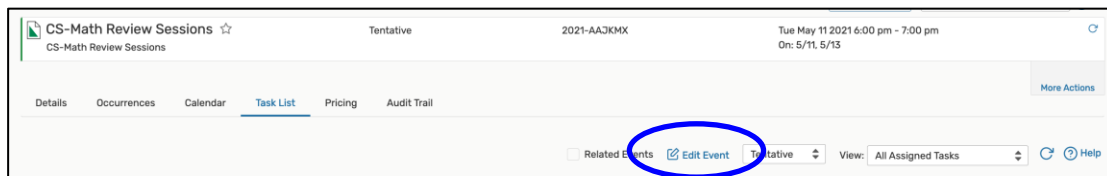
To view the event, click on the event name in the left column. The type of view displayed is based on the view you had opened last. If not on the details view, click **Details**
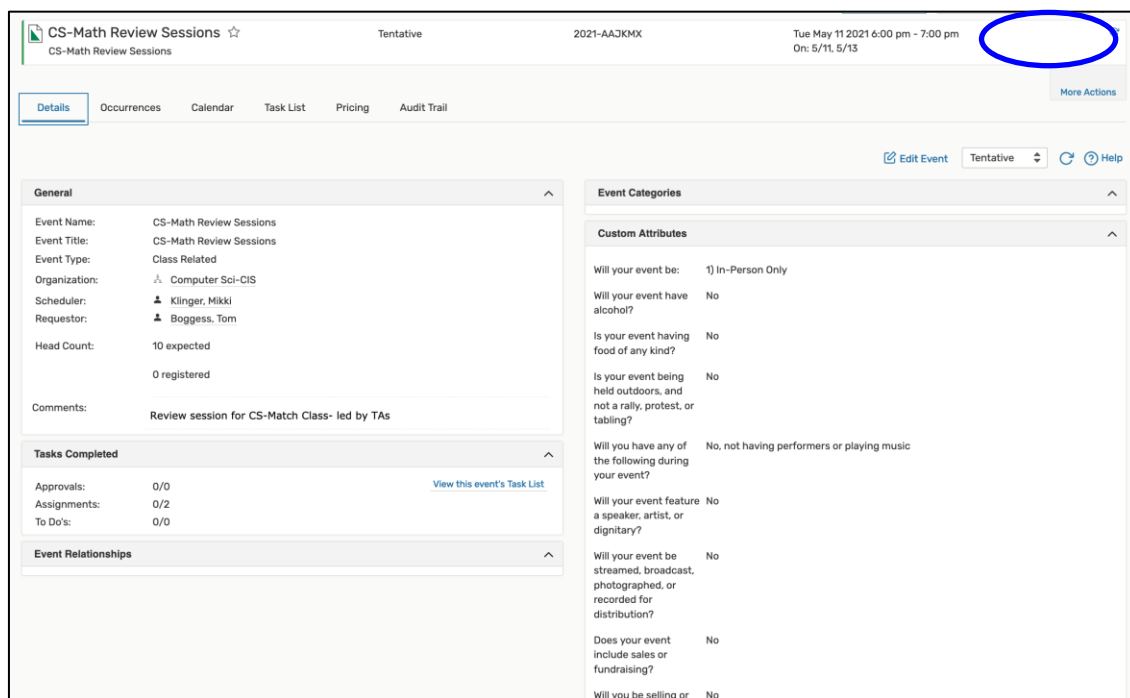
Note, no location has been *assigned*.

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

In this case, 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.

Start by clicking **Edit Event** and use the Navigation bar on the left to go locations.

And click the Reserve button, and Save.

Again, assigning the location from within the event form assures any approvals will be updated in the task list and / or notifications will be sent.

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 likely will use this location on one of these dates?
   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