

Workflow and Tasks in 25Live

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Workflow is the automated cycle of approvals from event creation to completion, including tasks and emails. In 25Live, the workflow that you use for your system is extremely customizable so that you can set it up for your specific needs.

Below we'll cover the different types of tasks and emails in 25Live, give tips on how to keep track of events, and show a couple of examples of how you could set up a basic out-of-the-box workflow or a more advanced workflow.

The Different Types of Tasks

There are three types of tasks in 25Live: Assignment Policy, Notification Policy & To Dos.

Assignment Policy

[Assignment Policy](#) controls whether an object is assigned to an event or not. It is managed by security group. Based on the relevant settings, different security groups are assigned to approve location and resource requests from other groups. Everyone in all the groups that have Approve rights will be issued a task. The task will always be complete once one person assigns or denies the request. Tasks are only generated if the person requesting the location/resource has Request permission. If the person requesting has Assign permission, no task is generated, and the item is immediately assigned to the event.

Notification Policy

[Notification Policy](#) solely records approval, but does not affect assignments. It is assigned to individual users by name. Each specific person named will get a task. You can specify whether one user can complete the task, or if all named users must complete the task. Notification tasks are ALWAYS generated when a location/resource is assigned, regardless of who assigns it.

To Dos

[To Dos](#) can be used to give reminders to users to perform specific tasks. They are assigned individually as one-offs when created. The user who creates a To Do cannot change it—only the assignee can make changes. To Do tasks can be triggered automatically using [Event Save Email](#) scenarios.

Task Use and Behavior

Each kind of task has different results and different options for completing them.

Type of task	Who uses them?	Triggered by	Task due date	Completion actions in task list	Effects
Assignment policy - assign	People who control assignments for a location or resource.	Event is in Tentative or Confirmed state and location or resource is added by user with Request or Request/Unassign privileges	Immediately	<ul style="list-style-type: none"> Assign Deny 	Object is assigned to the event. Requested objects are saved as preferences until assigned through an assignment policy task
Assignment policy - unassign	People who control assignments for a location or resource.	Event in Tentative or Confirmed state and a user with Request privileges attempts to unassign a location or resource	Immediately	<ul style="list-style-type: none"> Unassign Deny 	Object is unassigned from the event.
Notification policy - Authorization	<p>People who need to rubber-stamp some aspect of an event.</p> <p>No actions are tied to approve or deny. Will not remove or add anything from an event.</p>	<p>Event is in Tentative or Confirmed state and...</p> <ul style="list-style-type: none"> location or resource is assigned to the event (not requested) organization, event type, or requirement is attached to the event 	Relative to the current time; e.g. "2 days from now"	<ul style="list-style-type: none"> Approve Deny 	Approval or denial is noted on the event details in the Tasks view. Denial does not trigger any unassignment or further effect; it is purely informational.

Type of task	Who uses them?	Triggered by	Task due date	Completion actions in task list	Effects
Notification policy - FYI	People who need to be aware of an assignment on an event but do not need to take action on it.	<p>Event is in Tentative or Confirmed state and...</p> <ul style="list-style-type: none"> location or resource is assigned to the event (not requested) organization, event type, or requirement is attached to the event 	Relative to the current time; e.g. "2 days from now"	<ul style="list-style-type: none"> Acknowledge 	<p>Acknowledgement is noted on the event details in the Tasks view. No other effect results.</p> <p>Note: For all other tasks, once the task is completed by one user, it's marked as complete for all users. However, Acknowledge tasks remain active so that each user can record receipt.</p>
To Do	Anyone.	<ul style="list-style-type: none"> Can be created manually, either free-floating or associated with an event Can be created automatically using Event Save Email functionality 	Defined at creation	<ul style="list-style-type: none"> Complete Ignore 	<p>Task shows "complete" or "declined" on the event details in the Tasks view. If not associated with an event, the To Do only appears in the main Tasks tab.</p>
Cancel Request	People who want to cancel their events (note: they cannot be both the event Scheduler and Owner).	Request Cancellation action from the event details	Date of first event occurrence	<ul style="list-style-type: none"> Complete Ignore 	<p>Task shows "completed" or "ignored" on the event details in the Tasks view. A completed task changes the event state to Cancelled and releases any assigned locations and/or resources.</p>



Event state (Tentative/Confirmed) is independent of task approval.

Whether or not a location or resource is assigned or denied does not affect whether an event is Tentative or Confirmed.

As far as 25Live is concerned, there is no difference between the two event states, except whether your security group has permission to edit events in that state. The main difference between Tentative and Confirmed is whatever your business process defines it to be.



Tip: Confirming an Event Doesn't Complete All Event Tasks

If an event's [Event State](#) is changed to confirmed, the tasks in that event are not automatically completed (nor are they required to be completed in order to change the Event State).

The Different Types of Automated Emails

Type of Email	Use it to...	Other Info	Setup is Located in...
Automated Email Notifications	<ul style="list-style-type: none"> Alert users of tasks who aren't in 25Live everyday Notify requestors of event approval when not leveraging event state 	<ul style="list-style-type: none"> Options to send emails for Assign policy tasks, Notification policy tasks, To do tasks, or All tasks that are completed The email language of these cannot be customized 	Group Administration
Event Save Emails (ESE)	<ul style="list-style-type: none"> Send customized messages automatically when events are saved Leverage specific criteria 		25Live System Settings > Event Form Settings
Scheduled Reports	<ul style="list-style-type: none"> Send automated reports with event information 		25Live Reports > Reports Admin

Keeping Track of Events That Need More Coordination

Consider the following options to keep track of events that need more coordination.

Setup To Do Reminders

Create from Tasks menu or More Actions on an event. Keep track of those you need to get into contact with, etc. These will show up as comments on the event's task tab.

Add a Scheduler to Events With Bulk Editing

Use an event search to identify events that will need a Scheduler, excluding events that already have a scheduler assigned. Then use [bulk editing](#) to assign a scheduler to all of these events at once.

[Setup Event Form Rules](#)

Streamline the event form. Help people find resources. Cut down on emails and auto generated To Do tasks by allowing silent save.

Custom attributes added with rules are always required

[Request Cancellation](#)

Requestors can request the cancellation of events if they don't have access to edit because of the event state and have the correct FLS. A task is then triggered and sent to the event scheduler. Approving the cancellation will change the event state.

[Manage Tasks Lists](#)

Use the Tasks Menu lists to keep track. Easily filter through outstanding, overdue, and flagged tasks, as well as any tasks due today or this week.

Basic vs. Advanced Task Workflow

There are many ways to set up your workflow, but below we've included two of the most common examples.

Basic Task Workflow

This approach doesn't require very much setup or customization. It is task-dependent and requestor-tracked. Use this workflow for groups that only need object approval, where event roles include **Requestor** and **Approver**. This method leverages assignment policy emails.

Requestor: *The Requestor needs **request** rights on objects.*

- Once a requestor has made a request, this will trigger a task to the approver group.
- It can also generate an assignment policy task email.

Approver: *The Approver needs **approve** rights on objects.*

- Once the task reaches the approver, they take action. This can potentially send an email back to the requestor indicating that the task(s) have been completed.

Advanced Task Workflow

This approach is event-state dependent and scheduler-managed. Use for groups that need a lot of asynchronous approvals, where event roles include **Requestor**, **Approver/Authorizer**, and **Scheduler**. This method leverages Event Save Emails (ESE) with a tentative event state criteria.

Requester: *Needs assignment policy rights on objects*

- Once a requestor has made a request, this will trigger a task to the approver group.
- It can also generate an assignment policy task email.

Approver: *The Approver needs **approve** rights on objects.*

- Once the task reaches the approver, they take action.
- They can have an email setup notifying this group that they have tasks.
- An Event state email with Tentative criteria goes to requestors to let them know that their request is being reviewed.
- We could also notify other groups of this change.
 - **Authorizers:** To receive Notification Policy tasks and emails
 - **Schedulers:** Keep this group in the loop by passing along an email.

Authorizer: Approver assignments trigger notification policy task and email for authorizers.

We can also keep the scheduler notified in this process.

Scheduler: This can be a default scheduler by security group or location OR you could assign schedulers as events come in.

- Makes sure tasks are completed, changes the event state to confirmed.

Requestor:

- Receives an email that the event is confirmed