

Assignment Policy Exceptions for Locations and Resources

Assignment Policy (AP) Exceptions are set rules that restrict assignment policy rights by date, location/resource, and security group. So where [Assignment Policy](#) will determine who is allowed to request, assign, and approve objects, **Assignment Policy Exceptions** will determine the special cases that those policies should differ.

For example, a location may typically be **Requestable** for a security group, but an Assignment Policy Exception can reduce rights to **Not Requestable** or increase rights to **Assign and Approve** for designated days.

Assignment Policy Exceptions are versatile and can be created for:

- A single security group AND a single location/resource
- A single security group AND multiple locations/resources
- Multiple security groups AND a single location/resource
- Multiple security groups AND multiple locations/resources

This gives you flexibility by allowing you to bulk apply changes or make granular modifications.



Tip: Creating a Monthly Exception

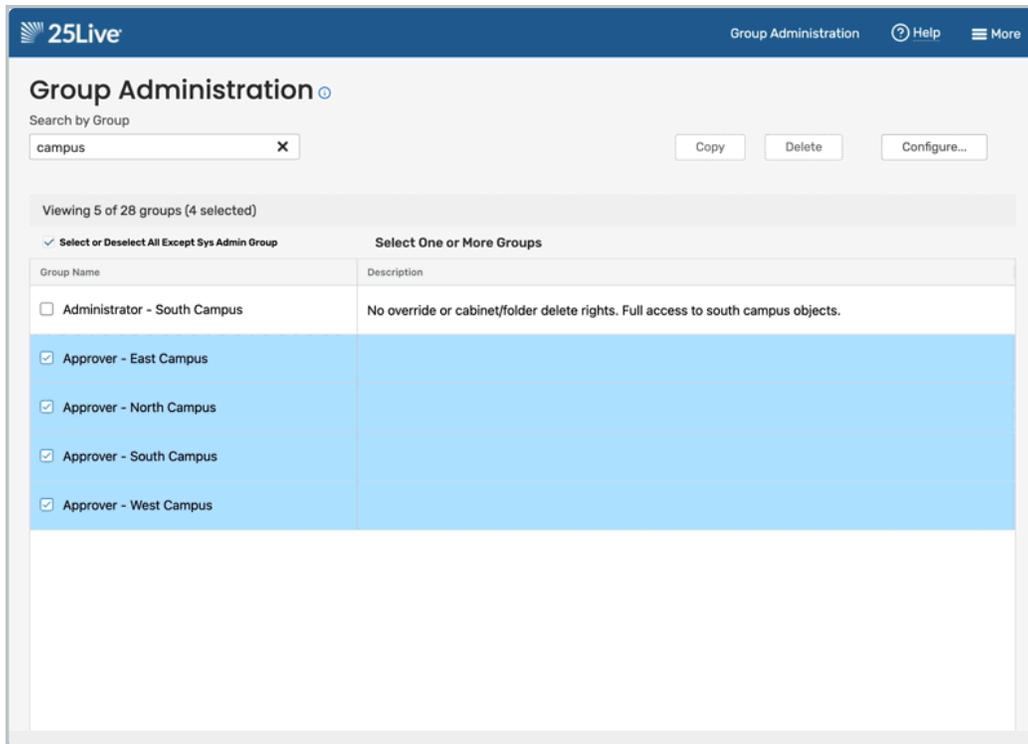
If you need a monthly repeat pattern, use the Date Exception option to create an exception for each month that is needed.



Note

Security groups will need at least Assign, Unassign rights to get an assignment task for an occurrence that partially overlaps their approval time.

Set or Edit an Assignment Policy Exception



Animation: To create or edit assignment policy exceptions for multiple groups: choose the groups and objects, select Assignment Policy, and open one of the editing windows using the buttons in the Exceptions column.

1. In Series25 Group Administration, select one or more groups
2. Select the **Configure... Location Security OR Resource Security**
3. From the dropdown menu, select a search or use a keyword to display a list of objects to edit
4. Under **Choose Security Type to View**, select **Assignment Policy**
5. Click the **Edit Selected Locations OR Edit Selected Resources**
6. list of search results will appear with a column for each security group's current settings.
 - o Use any of the filter options to narrow the search results:
 - o Select a different search or security option at any time
 - o Type an object's name into the search box
 - o Click **Show Differences** to only see objects where at least one security group has different settings than the others
 - *Note: not available when searches include more than 1000 results*
7. Select any number of objects you wish to change and click **Edit Selected Locations OR Edit Selected Resources.**
8. In the **Exceptions** column, click **Edit**
9. Create a new exception by choosing one of the following options and filling out the requested values:
 - o **Create New Day of the Week Exception**
 - **Day of Week, Start/End Time, Start/End Date, Assign Permission**

OR
 - o **Create New Date Exception**

- **Exception Name, Start/End Date, Assign Permission**

10. Edit an existing exception by locating the exception in the window and making modifications to the dropdown values
 - To delete an existing exception, click the **Remove** button and confirm the removal by pressing **OK**
11. Click **OK**
12. Don't forget to **Save** your changes