Tiered Workflow

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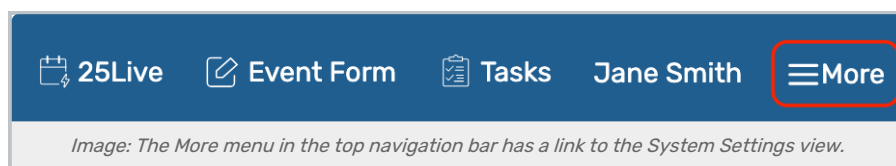- Warnings & Recommendations

What is Tiered Workflow?

Tiered Workflow is an automated process that links an event's tasks together so that they are completed in a pre-determined order. When Tiered Workflow is enabled, all of an event's tasks are grouped into "tiers," and only once all tasks within a tier are completed (assigned, approved, etc.) will the system move on to the next tier. Tasks are still built upon event creation but lower-tier tasks remain "pending" until any higher-tier "active" tasks are completed.
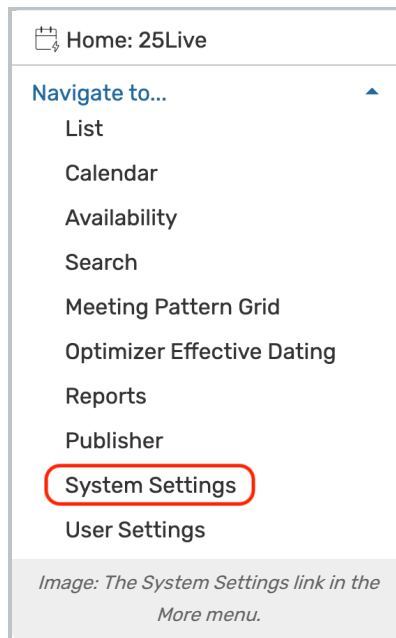
Enabling Tiered Workflow

25Live's System Settings includes a section to enable Tiered Workflow.
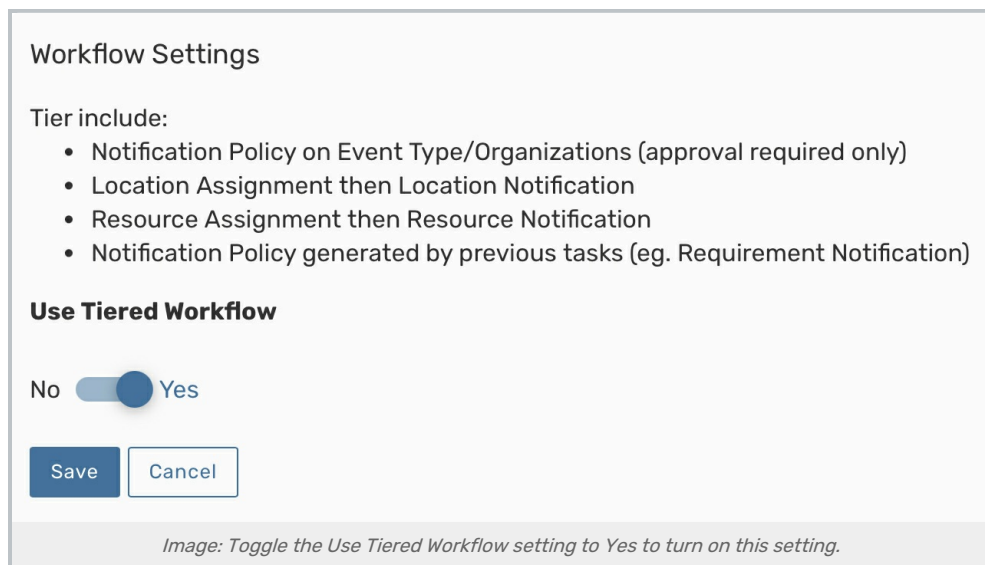
1. Open Tiered Workflow From the System Settings

The **System Settings** section is accessible from the **More** menu in the top navigation bar.

Image: The More menu in the top navigation bar has a link to the System Settings view.

Image: The System Settings link in the More menu.

Within the the **System Settings** view, go to the **Workflow Settings** section using the link in the top row.

2. Toggle Tiered Workflow On

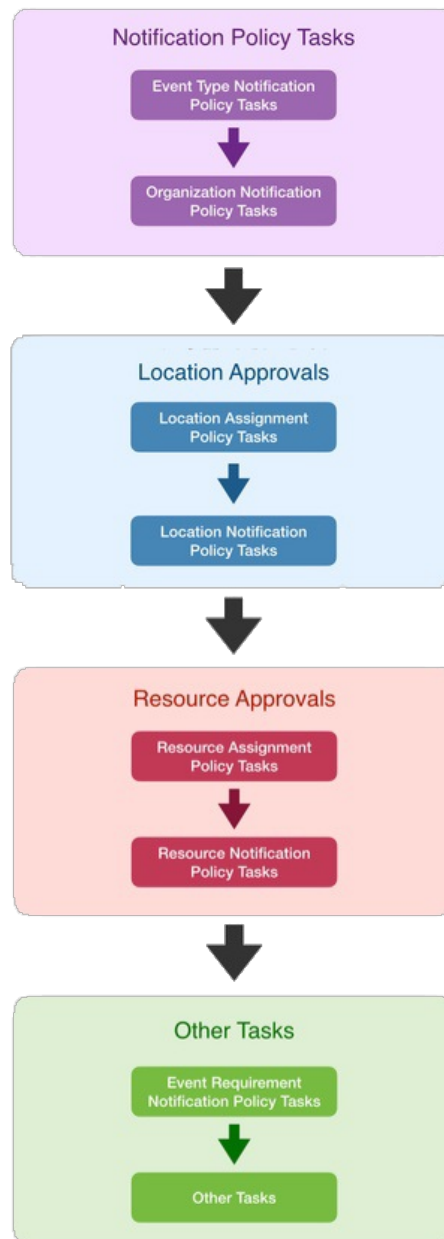Image: Toggle the Use Tiered Workflow setting to Yes to turn on this setting.

Under **Workflow Settings**, review the information about this type of workflow and set the **Use Tiered Workflow** toggle to **Yes**. Don't forget to **Save**.

Tiers

The four tier groups run in the following order:

Notification Policy Tasks → Location Approvals → Resource Approvals → Other Tasks

More specifically, individual tasks are completed in this order:

Rather than a tier only opening when all tasks are "Approved" or "Assigned," tasks that are "Pending" simply due to the previous tier containing a denied task will become actionable. Pending tasks that never became actionable will not display in search results. Notifications in 25Live will let you know when a task is completed and is the last task in a tier.

To ensure task tiers appropriately open when expected, the next tier will open once all tasks in the current tier *are completed*.
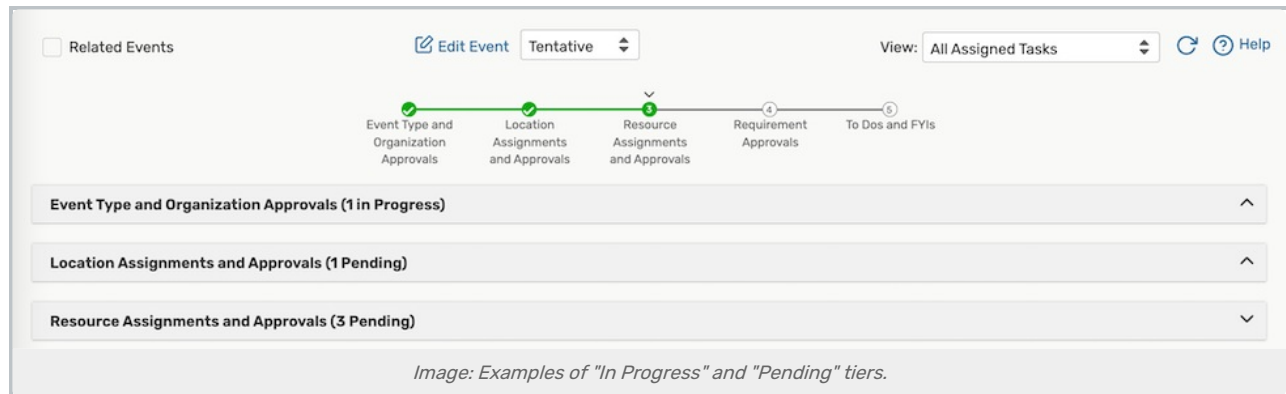
> **ℹ Note**
>
> FYI—or "Notify Only"—tasks and To Do tasks exist outside of the Tiered Workflow and will not block other tasks.

Examples

The Tasks tab features a progress bar at the top of the view that shows which levels have been completed. To view individual task details, toggle the arrow at the top-right of each tier.

In this example, we can see that the tasks from the first tier (Notification Policy) are active and can be acted on, while tasks in the Location Approvals tier are inactive (pending), with no available actions.

Image: Examples of "In Progress" and "Pending" tiers.

✓ **Tip: Pending**

Clicking the "Pending" link on a task will open a modal that tells you which task types are blocking the pending task, as well as the list of users assigned to the pending task.

MSC BRA

Blocked By Task Type:
    Event Type Approval

Pending Task Assignees

Assign In Progress
    Admin, R25
    Approver, Macadam
    Dean of Students
    Demo, R25
    Smith, Jane
    Student Center Manager

In this example, the Event Type and Organization Approvals tasks and the Location Assignments and Approvals tasks have been completed, but the Resource Assignments and Approvals are still active.

Image: Completed and active tiers.

Warnings & Recommendations

Before enabling Tiered Workflow, consider the following:

- Turning on Tiered Workflow will impact existing tasks.

- Bulk editing tasks—such as approving location assignments—will override workflow tiers.

- Reviewing all of your "Approval Required" notification policies for organizations and event types before enabling Tiered Workflow is recommended.
    - Any incomplete notification policy will block Assignment Policy tasks from being approved.

- Turning off Tiered Workflow will revert your instance back to the standard format. You can toggle Tiered Workflow back and forth as needed without negative impact.