Tiered Workflow

What is Tiered Workflow?

Tiered Workflow is an automated process that links an event's <u>tasks</u> together so that they are completed in a predetermined 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 <u>completed</u> (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

You can enable Tiered Workflow from 25Live's System Settings.

1. Open System Settings

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



2. Select Workflow Settings

• Within the System Settings view, select the Workflow Settings tab from the top row.

System Settings	5			
General Settings	Event Save Email	Event Form Settings	Embedding	Blackout Management
Pricing Settings	Publisher Settings	Workflow Settings	System Tags	Standard Schedules
	Image.	Select the Workflow Settings	tab.	

3. Toggle Tiered Workflow On



- 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.

A Note

Switching to Tiered Workflow does not have a long-term impact. You can revert back to the default task workflow at any time by toggling **Use Tiered Workflow** back to **No**.

Tier Order

The four tier groups always run in the following order:

- 1. Event Type and Organization Approvals
- 2. Location Assignments and Approvals
- 3. Resource Assignments and Approvals
- 4. Requirement Approvals

Note

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FYI—or Notify Only—tasks and To Do tasks exist outside of the Tiered Workflow system and will not block other tasks.

When you review the **Task List** tab of an event, you will see each tier's status beside it in parenthesis.

- In progress tasks are active and actionable. Completing (approving, assigning, denying, etc.) all of the In progress tasks will open the next pending tier.
- **Pending** tasks will not be actionable until all tasks in the prior tier are completed.
 - Pending tasks will not display in search results.
- **Completed** tasks have had action taken on them and don't require any further action.

Notifications in 25Live will let you know when a task is completed and is the final task in a tier.

Examples

The Task List 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 first tier (Event Type and Organization Approvals) is in progress, so the task in that tier can be acted on, while tasks in the Location Assignments and Approvals tier are inactive (pending).



Related Events	🕑 Edit B	event Tentative	e 🗘		View: All Assigned Tasks	\$ C ③ Help
	Event Type and Organization Approvals	Location Assignments and Approvals	3 Resource Assignments and Approvals	4 Requirement Approvals	© To Dos and FYIs	
Event Type and Organization App	rovals (1 in Progress)					^
Location Assignments and Appro	vals (1 Pending)					^
Resource Assignments and Appr	ovals (3 Pending)					~
	Image	e: Examples d	of In Progress	and Pending	tiers.	

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 tasks are still active.

		Event Ty Organiz Appro	pe and tation A vals ar	Location ssignments nd Approvals	8 Resource Assignments and Approvals	4 Requirement Approvals	5 To Dos and FYIs		
/ent Type and Organ	nization Appr	rovals (Compete	d)						
cation Assignment	s and Approv	vals (Completed)	1						
Task Item -	Туре –	Status	Flagged	Respond By	- First Date	- Action	Assign To -	Comments	
🗇 BCC 300	Assign	Assigned		Mon Mar 18	岱 Tue Apr 09	None	You and Integration, Outlook		Ľ
esource Assignmen	ts and Appro	vals (3 In Progre	ss)						
0 of 5 rows selected									
Task Item	- Туре	- Status	Flagged	Respond By	- First Date	e - Action	n Assign To	 Comments 	
Task Item	- Type FYI	- Status In Progress	Flagged	Respond By Thu Mar 21	 First Date Tue Apr 09 	e [–] Action None	n Assign To • Clark, Lisa • Media Services Manager	Comments	
Task Item AV - Technician AV - Data Projector [Quantity: 1]	- Type FYI Assign	- Status In Progress In Progress	Flagged	Respond By Thu Mar 21 Mon Mar 18	 First Date Tue Apr 09 Tue Apr 09 	Action None CP Den	Assign To Clark, Lisa Media Services Manager Add/Remove Users You and Admin, 25Liv Integration, Outlook Media Services Manager	- Comments	Ľ
Task Item Task Item AV - Technician AV - Data Projector [Quantity: 1] AV - Microphone - Hand Held with Cord [Quantity:	- Type FYI Assign Assign 1]	- Status In Progress In Progress In Progress	Flagged	Respond By Thu Mar 21 Mon Mar 18 Mon Mar 18	 First Date Tue Apr 09 Tue Apr 09 Tue Apr 09 Tue Apr 09 	Action None Assi C Den Assi C Den	 Assign To Clark, Lisa Media Services Manager You and Admin, 25Liv Integration, Outlook Media Services Manager You and Admin, 25Liv Integration, Outlook Media Services Manager 	- Comments e	Ľ

Warnings & Recommendations

Before enabling Tiered Workflow, consider the following:

- Enabling Tiered Workflow will affect existing tasks.
- Bulk editing tasks, such as approving location assignments, will override workflow tiers.
- It is recommended that you review all of your **Approval Required** notification policies for organizations and event types before enabling Tiered Workflow.

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- Any incomplete notification policy will block assignment policy tasks from being approved.
- Disabling Tiered Workflow will revert your instance to the standard format. You can toggle Tiered Workflow on and off as needed without long-term impact.