
**Who can use tasks?**
- Schedulers: Authority to assign selected locations and resources
- Service Providers: Provide resources and services – equipment, facilities assistance, etc.
- Individuals: Approve or acknowledge (be aware) of certain aspects of the event or approve miscellaneous tasks

**What are tasks?**
- Tasks are “jobs” related to scheduling or event management that 25Live tracks
- You can give tasks, and you can receive tasks
- Tasks DO NOT generate emails

**When should you use tasks?**
- Automatically notify service providers that their resources and/or services are needed
- Some scheduling practices require official approval for certain aspects of events
- Single source for tracking event communications and tasks

**Why should you use tasks?**
- To communicate automatically and proactively with those involved in an event
- Tasks help to simplify and streamline your work
- Completed tasks are tracked within the 25Live event record and are searchable within 25Live
Three Types of Tasks

Assignment
• Automatically generated
• Requests that a Location or a Resource be assigned
• Once assigned, the Location/Resource is reserved

Notification
• Automatically generated
• Communicates that Location or a Resource has been scheduled

To Do
• Customized communication
• Case by case basis
Viewing Tasks

Upon signing in to 25Live, a window will be displayed that indicates any Overdue Tasks that you might have:

You can either:
1. Click on "Click to View Your Overdue Tasks" or
2. Click on Close

After choosing Option 1 above, your Overdue Tasks will be displayed:
After choosing Option 2 above, your Home Page will be displayed. To view tasks, click on the Tasks tab or choose any item listed near the bottom of the display:

- Tasks
- You have No Tasks on Today’s Agenda
- 18 Outstanding Tasks
- 21 Flagged Tasks
- 0 Tasks Assigned By You

It’s a good practice to choose “Outstanding Tasks” so that they can be worked first and in a prioritized manner.

Below is an example of some Outstanding Tasks:

From here, you can also choose different kinds of tasks to view.

- **Overdue**: Tasks assigned to you and due today or within the past 30 days and not yet completed
- **Outstanding**: Tasks assigned to you and due within the past 30 days and not yet completed
- **Flagged**: Tasks that you haven’t acted on yet, or that you returned to a flagged status
- **Assigned by you**: To yourself and others

You can choose an Action (Assign/Deny) from this display or you can click on the Event to see more detail prior to selecting an Action.
What do the GREEN and RED symbols indicate?

<table>
<thead>
<tr>
<th>Task Type</th>
<th>Category</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Task</td>
<td>Location/Resource</td>
<td>Assign? / Deny?</td>
</tr>
<tr>
<td>Notification Task</td>
<td>Location/Resource</td>
<td>Acknowledge?</td>
</tr>
<tr>
<td>To Do Task</td>
<td>Created by you and by others</td>
<td>Complete? / Ignore?</td>
</tr>
<tr>
<td></td>
<td>Case by case basis</td>
<td></td>
</tr>
</tbody>
</table>

What Happens If...?

**Assignment Task**

Assign = Location/Resource **IS** assigned
Deny = Location/Resource **IS NOT** assigned

**Notification Task**

Acknowledge = action noted. Does not affect reservation

**To Do**

Complete = action noted. Does not affect reservation
Ignore = action noted. Does not affect reservation
Seeing more Event Detail prior to Approval/Denial

When the event Detail is displayed, select “View the event’s Task List”

The Task List is displayed.

Select “More Actions” and Expand All Tasks to show more information.
Viewing the instructions for locations/resources

To see more event information, click on the expand button within the occurrence.

The event details are listed along with any instructions for the locations/resources.
Complete Assignment Task

After Selecting the Action, the task will be at the bottom of the task list showing its new status.

Many times, an event has a notification task associated with it which notifies the event coordinator about a specific event scheduling action. The task list above shows resources that need either approval or denial. These tasks also require an Acknowledgement by the event coordinator.

It is important to remember that when selecting Deny, nothing is cancelled or removed from the event.
Complete Notification Task

Similar to the Assignment Tasks, the Notification Tasks can be completed either in the Task Overview or on the Task List within the Event tab.

From the Task Overview, Select “Acknowledge” or click on the Event to view more information prior to completing the Acknowledgement Task.
From the Task List within the Event tab, Select “Acknowledge” for each Notification Task.
Creating an event-related “To Do” Task

On the Details tab of the event, click on More Actions and then select, Create “To Do” Task

1. Fill in the information for the “To Do” task.
2. Choose the contact who should receive this “To Do” task for this event.
3. When the “To Do” Task is complete, click on Close or Create Another “To Do” Task.
Viewing “To Do” Tasks

When the user, who was assigned the “To Do” Task, logs on 25Live they will have Outstanding Tasks.

After clicking on their outstanding tasks, their task list is displayed.
Completing “To Do” Tasks

At this point, the user can click on the Task Item to view the “To Do” task or they can Select the Event.

Clicking on the Task Item, displays the Edit “To Do” Task window.

Clicking on the Event, re-directs you to the event, where you can then click on the Tasks tab. Click on the Event again and this is where the “To Do” Task can be completed.
Creating an Independent “To Do” Task

At times, it might be helpful to have a “To Do” list that lists tasks that are not related to an event. To do this, click on the Tasks tab and Select Create “To Do” Task.

Fill in the information for the “To Do” task. Choose the contact who should receive this “To Do” task.

When the “To Do” Task is complete, click on Close or Create Another “To Do” Task.

The “To Do” Task will be on the Task List of the person to which it was assigned, and the Event will refer to “none”. After the “To Do” Task is completed, the person assigned the task will Select the “Complete” Action; otherwise, they can Select the “Ignore” Action.
Tasks Agenda

• Found on the second tab within the Task tab
• Displays a calendar of events with tasks assigned to you
• Used for managing notification tasks
• You can set the date range interval and dates to view
• Typically used by service providers
• Used as a schedule
• Information based – not action based
• Does not show instructions
Another view used by service providers:

Tasks Agenda

- Can view tasks by day/week/month when using the Date filter
- Tasks display chronologically
- Shows setup and take down as separate entries

Other tools used by service providers

- Print the event confirmation from More Actions
- Run a report from the Resource Report group
  - Daily operations
  - Daily operations by space
  - Daily setup report
  - Daily setup by space