

Tasks in 25Live

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Tasks in 25Live – Who, What, When, and Why??

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

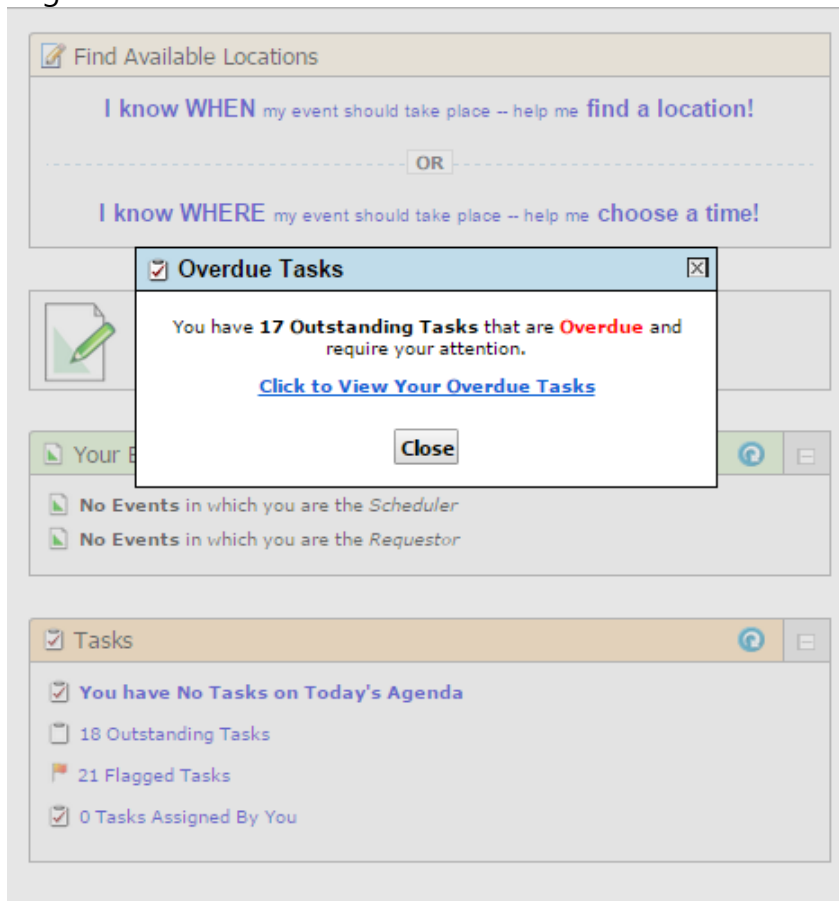
- Automatically generated
- Communicates that Location or a Resource has been scheduled

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

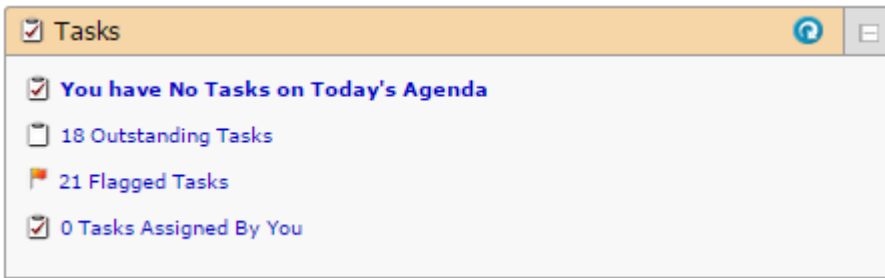
After choosing Option 1 above, your Overdue Tasks will be displayed:

The screenshot shows the 'Overview of Tasks' page in 25Live. The page has a navigation bar with links to Home, Event Wizard, Events, Locations, Resources, Organizations, Tasks, and Reports. Below the navigation bar, there are tabs for 'Overview of Tasks', 'Tasks Agenda', and 'Advanced Task Search'. The 'Overview of Tasks' tab is selected. A dropdown menu 'Choose Which Tasks To View' is open, showing options: Overdue, Outstanding, Flagged, Completed, Assigned By You: All, Assigned By You: Completed, and Assigned By You: Denied. The main content area displays a table of tasks. The table has columns: Event, Title, Task Item, Status, Actions, Respond By, First Date, Reference, and Assigned By. The table lists 17 matching tasks, all with a status of 'Active / In Progress'. The tasks are grouped by event: 'Test - CSUEB-affiliate Picnic', 'Test-concert Non-CSUEB', 'Resource Test', and 'Ath - Test CSUEB Special Event'. The tasks are: H-GROUNDS STAFF, H-GROUNDS CLEANUP, H-TABLES, H-BBQ, H-TABLES, H-TRASH CAN, H-RECYCLING BINS, H-TRASH CAN, H-RECYCLING BINS, and H-CUSTODIAL STAFF. The table also includes columns for 'Respond By', 'First Date', 'Reference', and 'Assigned By'. The 'Assigned By' column shows 'Carter, Ruth' for most tasks and 'Dobbin, Andy' for one task. The page footer shows '17 Matching Tasks' and 'Page 1 of 2'.

Event	Title	Task Item	Status	Actions	Respond By	First Date	Reference	Assigned By
Test - CSUEB-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-GROUNDS STAFF	Active / In Progress	Approve? Deny?	Sep 03 2015	Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test-concert Non-CSUEB	Test-Concert Non-CSUEB	<input type="checkbox"/> H-GROUNDS CLEANUP	Active / In Progress	Approve? Deny?	Sep 03 2015	Sep 25 2015	2015-AAHSXF	Carter, Ruth
Resource Test	Resource test	<input type="checkbox"/> H-TABLES	Active / In Progress	Approve? Deny?	Sep 02 2015	Sep 01 2015	2015-AAHSXB	Dobbin, Andy
Test - CSUEB-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-BBQ	Active / In Progress	Approve? Deny?	Sep 02 2015	Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test - CSUEB-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-TABLES	Active / In Progress	Approve? Deny?	Sep 02 2015	Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test - CSUEB-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-TRASH CAN	Active / In Progress	Approve? Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test - CSUEB-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-RECYCLING BINS	Active / In Progress	Approve? Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test-concert Non-CSUEB	Test-Concert Non-CSUEB	<input type="checkbox"/> H-TRASH CAN	Active / In Progress	Approve? Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSXF	Carter, Ruth
Test-concert Non-CSUEB	Test-Concert Non-CSUEB	<input type="checkbox"/> H-RECYCLING BINS	Active / In Progress	Approve? Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSXF	Carter, Ruth
Ath - Test CSUEB Special Event	Ath - Test CSUEB Special Event	<input type="checkbox"/> H-CUSTODIAL STAFF	Active / In Progress	Approve? Deny?	Aug 31 2015	Sep 06 2015	2015-AAHSWW	Carter, Ruth

Viewing Tasks (continued)

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:

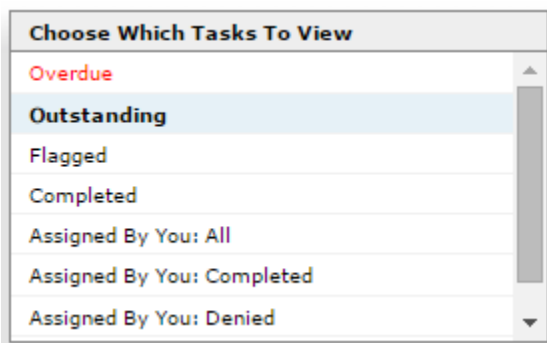


It's a good practice to choose "Outstanding Tasks" so that they can be worked first and in a prioritized manner.

Below is an example of some Outstanding Tasks:

Event	Title	Task Item	Status	Actions	Respond By	First Date	Reference	Assigned By
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-CHAIRS	Active / In Progress	Approve? / Deny?	Sep 04 2015	Sep 25 2015	2015-AAHSKE	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-GROUNDS STAFF	Active / In Progress	Approve? / Deny?	Sep 03 2015	Sep 25 2015	2015-AAHSKE	Carter, Ruth
Test-concert Non-csub	Test-Concert Non-CSUEB	<input type="checkbox"/> H-GROUNDS CLEANUP	Active / In Progress	Approve? / Deny?	Sep 03 2015	Sep 25 2015	2015-AAHSKF	Carter, Ruth
Resource Test	Resource test	<input type="checkbox"/> H-TABLES	Active / In Progress	Approve? / Deny?	Sep 02 2015	Sep 01 2015	2015-AAHSXB	Dobbin, Andy
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-BBQ	Active / In Progress	Approve? / Deny?	Sep 02 2015	Sep 25 2015	2015-AAHSKE	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-TABLES	Active / In Progress	Approve? / Deny?	Sep 02 2015	Sep 25 2015	2015-AAHSKE	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-TRASH CAN	Active / In Progress	Approve? / Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSKE	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	<input type="checkbox"/> H-RECYCLING BINS	Active / In Progress	Approve? / Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSKE	Carter, Ruth
Test-concert Non-csub	Test-Concert Non-CSUEB	<input type="checkbox"/> H-TRASH CAN	Active / In Progress	Approve? / Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSKF	Carter, Ruth
Test-concert Non-csub	Test-Concert Non-CSUEB	<input type="checkbox"/> H-RECYCLING BINS	Active / In Progress	Approve? / Deny?	Sep 01 2015	Sep 25 2015	2015-AAHSKF	Carter, Ruth

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?

<ul style="list-style-type: none">• Assignment Task<ul style="list-style-type: none">— Location— Resource	 Assign? /  Deny?
<ul style="list-style-type: none">• Notification Task<ul style="list-style-type: none">— Location— Resource	 Acknowledge?
<ul style="list-style-type: none">• To Do Task<ul style="list-style-type: none">— Created by you and by others— Case by case basis	 Complete? /  Ignore?

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"

Event Details	
Event Name:	Test - Csueb-affiliate Picnic
Event Title:	Test - CSUEB-affiliate Picnic
Event Type:	Special Event
Reference:	2015-AAHSXE
Alien UID:	
State:	Confirmed
Organization:	OFFICE OF CSCI
Scheduler:	Carter, Ruth
Requestor:	Carter, Ruth
Head Count:	150 expected
Tasks Completed:	
Approvals:	1/9
Assignments:	0/0
To Do's:	0/0
View this event's Task List	
Event Custom Attributes:	
1 - Advertisement Accepted	Yes
Requirements:	
Advertising	
Food	

The Task List is displayed.

View: Only Tasks Assigned To You More Actions... Refresh

Tasks for "Test - Csueb-affiliate Picnic"

From 12:00 PM to 03:00 PM on Fri Sep 25 2015.
Related Location(s): SCI EAST PICNIC

Notifications: Locations & Resources			More Actions...
<input type="checkbox"/> H-BBQ	Status: Active	Flagged?:	Expand All Tasks in this Section
<input type="checkbox"/> H-CHAIRS	Status: Active	Flagged?:	Collapse All Tasks in this Section
<input type="checkbox"/> H-GROUNDS STAFF	Status: Active	Flagged?:	Approve All Your Tasks in this Section
<input type="checkbox"/> H-RECYCLING BINS	Status: Active	Flagged?:	Deny All Your Tasks in this Section
<input type="checkbox"/> H-TABLES	Status: Active	Flagged?:	Flag All Your Tasks in this Section
<input type="checkbox"/> H-TRASH CAN	Status: Active	Flagged?:	Unflag All Your Tasks in this Section
<input checked="" type="checkbox"/> H-CUSTODIAL SERVICES	Status: Cancelled	Flagged?:	

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.

Details

Calendar

More Actions...

Refresh

Event Preferences

The following resource preferences were registered:

H-CUSTODIAL SERVICES

[Quantity: 1]

Remove preferences

Event Occurrences

Start Date	Start Time	End Date	End Time	Assignments	
Fri Sep 25 2015	12:00pm	Fri Sep 25 2015	3:00pm	<div></div>	<div><div></div><div></div></div>

Expand this Occurrence

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

Event Occurrences

Start Date	Start Time	End Date	End Time	Assignments	
Fri Sep 25 2015	12:00pm	Fri Sep 25 2015	3:00pm	<div></div>	<div><div></div><div></div></div>
Setup Start:	11:00am	Takedown End:	4:00pm		
Location:	<div><div></div>SCI EAST PICNIC</div>	Layout:	Activity		
Resources:	<div><div>H-BBQ</div><div>Instructions: Please place the BBQs near the 3 food setup tables</div></div>	Quantity:	2		
	<div><div>H-CHAIRS</div><div>Instructions: Please place 8-9 chairs per table</div></div>	Quantity:	160		
	<div><div>H-GROUNDS STAFF</div></div>	Quantity:	1		
	<div><div>H-TABLES</div><div>Instructions: Please place 3 tables end-to-end near the BBQ for food setup, and the remaining 15 tables need to be in 3 rows with 6 tables end-to-end in each row</div></div>	Quantity:	18		
	<div><div>H-TRASH CAN</div><div>Instructions: Make sure the trash cans are emptied in a timely manner</div></div>	Quantity:	4		
	<div><div>H-RECYCLING BINS</div><div>Instructions: Recycling bins are required</div></div>	Quantity:	2		

Complete Assignment Task

Tasks for "Test - Csueb-affiliate Picnic"

From 12:00 PM to 03:00 PM on Fri Sep 25 2015.
Related Location(s): SCI EAST PICNIC

Notifications: Locations & Resources

Task Name	Status	Dates Assigned	Comments	Resource Quantity	Assigned To	Notified [FYI]	Flagged?	Respond By Date	Action
H-BBQ	Active	All	FM-100200 EDIT	1	Rios, Jose	Captain A, Web		Sep 02 2015	Approve? / Deny?
H-CHAIRS	Active	All	ticket# EDIT	160	Rios, Jose	Captain A, Web		Sep 04 2015	Approve? / Deny?
H-GROUNDS STAFF	Active	All	(none) EDIT	1	Rios, Jose	Captain A, Web		Sep 03 2015	Approve? / Deny?
H-RECYCLING BINS	Active	All	(none) EDIT	2	Rios, Jose			Sep 01 2015	Approve? / Deny?

Comments that others have inserted. These are only visible to the participants in the task's workflow.

Select Approve or Deny

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

<input checked="" type="checkbox"/> H-CHAIRS	Status: Approved	Flagged?:	
<input checked="" type="checkbox"/> H-GROUNDS STAFF	Status: Approved	Flagged?:	
<input checked="" type="checkbox"/> H-CUSTODIAL SERVICES	Status: Cancelled	Flagged?:	

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.

Overview of Tasks

Tasks Agenda

Advanced Task Search



Overview of Tasks

Choose Which Tasks To View

Overdue

Outstanding














Flagged

Completed

Assigned By You: All

Assigned By You: Completed

Assigned By You: Denied

Event	Title	Task Item	Status	Actions
Test - Csueb-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-BBQ	Active / In Progress	 Acknowledge?
Test - Csueb-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-CHAIRS	Active / In Progress	 Acknowledge?
Test - Csueb-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-TABLES	Active / In Progress	 Acknowledge?
Test - Csueb-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-TRASH CAN	Active / In Progress	 Acknowledge?
Test - Csueb-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-RECYCLING BINS	Active / In Progress	 Acknowledge?
Test - Csueb-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-GROUNDS STAFF	Active / In Progress	 Acknowledge?
Test-concert Non-csueb	Test-Concert Non-CSUEB	Food	Active / In Progress	 Approve? /  Deny?
Test-concert Non-csueb	Test-Concert Non-CSUEB	1 - Fire Marshall	Active / In Progress	 Acknowledge?
Test-concert Non-csueb	Test-Concert Non-CSUEB	3 - Posting/Advertising Policy	Active / In Progress	 Approve? /  Deny?
Test-concert Non-csueb	Test-Concert Non-CSUEB	Contract	Active / In Progress	 Approve? /  Deny?

Complete Notification Task (continued)

From the Task List within the Event tab, Select "Acknowledge" for each Notification Task.

DetailsCalendarTask ListPricingAudit Trail

View: Only Tasks Assigned To You Edit this EventEvent State: ConfirmedMore Actions...Refresh

Tasks for "Test - Csueb-affiliate Picnic"

From 12:00 PM to 03:00 PM on Fri Sep 25 2015.
Related Location(s): SCI EAST PICNIC

Notifications: Event

3 - Posting/Advertising Policy

Status: Active

Flagged?:

Food

Status: Active

Flagged?:

Notifications: Locations & Resources

H-BBQ

Status: Active

Flagged?:

Dates Assigned: All

Respond By Date: Sep 02 2015

Comments: FM-100200

Resource Instructions:
Please place the BBQs near the 3 food setup tables

Resource Quantity: 2

Assigned To:
Rios, Jose

In Progress

Notified [FYI]:
Captain A, Web

Acknowledge?

H-RECYCLING BINS

Status: Active

Flagged?:

Dates Assigned: All

Respond By Date: Sep 01 2015

Comments: (none)

Resource Instructions:
Recycling bins are required

Resource Quantity: 2

Assigned To:
Rios, Jose

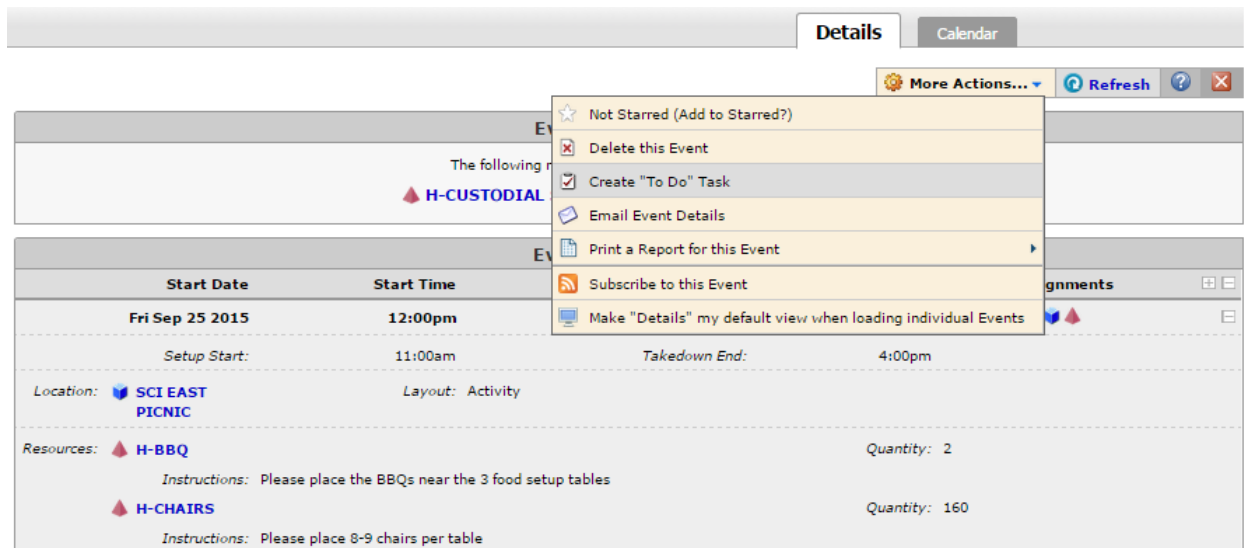
In Progress

Notified [FYI]:
Captain A, Web

Acknowledge?

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



The 'Create "To Do" Task' dialog box is shown. It contains the following information:

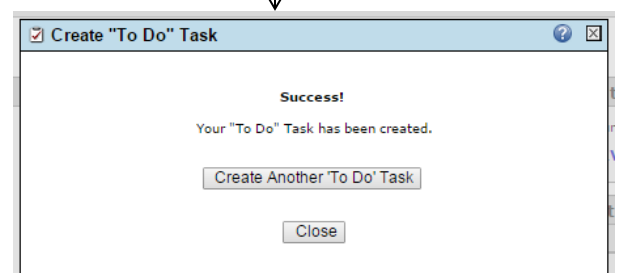
- Associated Event:** Test - Csueb-affiliate Picnic
- "To Do" Name:** Picnic Reminders
- "To Do" Comment:** Remember to clean out the BBQs first
- Due Date:** Fri Sep 25 2015
- Assigned By:** Rios, Jose
- Assigned To:** Ramirez, Terri

A search box is visible with the text 'terri' entered. The search results show 'Ramirez, Terri' highlighted.

Fill in the information for the "To Do" task.

Choose the contact who should receive this "To Do" task for this event.

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

Welcome, Ramirez, Terri ▾

Organizations Tasks Reports

Find Available Locations

I know WHEN my event should take place -- help me find a location!

OR

I know WHERE my event should take place -- help me choose a time!

Create an Event

Your Events

No Events in which you are the Scheduler

No Events in which you are the Requestor

Tasks

You have No Tasks on Today's Agenda

3 Outstanding Tasks

4 Flagged Tasks

0 Tasks Assigned By You

Recently Viewed

Test - Csu

Your Start

You do not have any tasks throughout the month

Your Start

You do not have any tasks throughout the month

Your Start

You do not have any tasks throughout the month

After clicking on their outstanding tasks, their task list is displayed.

Home Event Wizard Events Locations Resources Organizations Tasks Reports

Overview of Tasks Tasks Agenda Advanced Task Search

Overview of Tasks

Choose Which Tasks To View

Overdue

Outstanding

Flagged

Completed

Assigned By You: All

Assigned By You: Completed

Assigned By You: Denied

Choose Visible Columns Create "To Do" Task Refresh

Event	Title	Task Item	Status	Actions	Respond By	First Date	Reference	Assigned By
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	Picnic Reminders	Active / In Progress	Complete? / Ignore?	Sep 25 2015	Sep 25 2015	2015-AAHSXE	Rios, Jose
Science Festival	Science Festival	H-CHAIRS	Active / In Progress	Approve? / Deny?	Aug 11 2015	Sep 05 2015	2015-AAHSVY	Wallace, Lucero
Summer Concert	summer concert	H-CHAIRS	Active / In Progress	Approve? / Deny?	Aug 09 2015	Aug 08 2015	2015-AAHSUK	Carter, Ruth

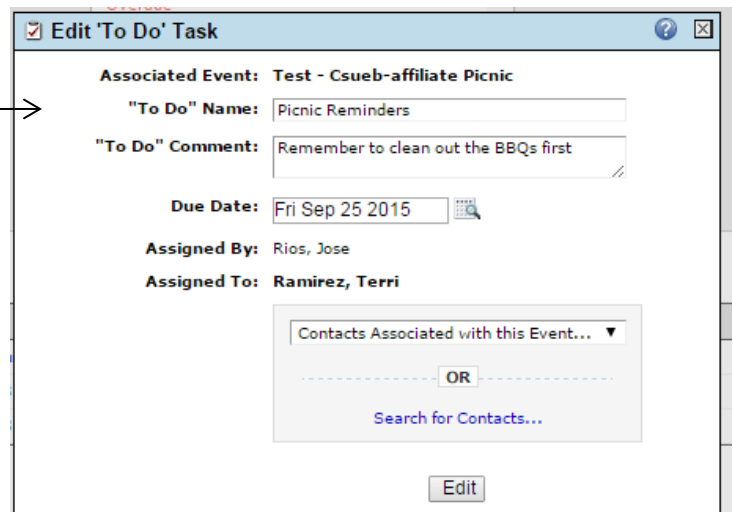
Information is current as of Sep 08 2015 9:27am

3 Matching Tasks

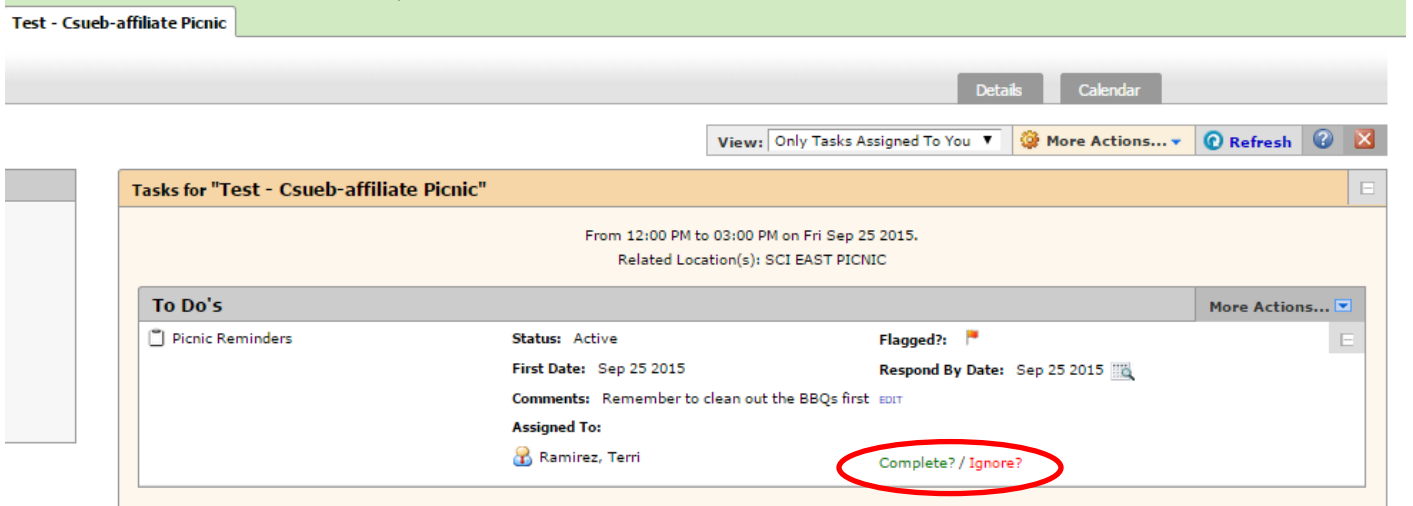
Completing "To Do" Tasks

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.

Overview of Tasks | Tasks Agenda | Advanced Task Search

Overview of Tasks

Choose Which Tasks To View

- Overdue
- Outstanding
- Flagged
- Completed
- Assigned By You: All
- Assigned By You: Completed
- Assigned By You: Denied

Choose Visible Columns | **Create "To Do" Task** | Refresh

Event	Title	Task Item	Status	Actions	Respond By	First Date	Reference	Assigned By
Resource Test	Resource Test	1 - Fire Marshall	Active / In Progress	✓ Acknowledge?		Sep 08 2015	2015-AAHSKT	Floater, Test
Resource Test	Resource Test	4 - Minors Policy	Active / In Progress	✓ Approve? / ⚠ Deny?	Sep 08 2015	Sep 08 2015	2015-AAHSKT	Floater, Test
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-CHAIRS	Active / In Progress	✓ Acknowledge?		Sep 25 2015	2015-AAHSXE	Carter, Ruth
Vbt - Test Csub Special Event	VBT - Test CSUEB Special Event	VBT-0124	Active / In Progress	✓ Approve? / ⚠ Deny?	Sep 03 2015	Sep 18 2015	2015-AAHSWZ	Carter, Ruth
Vbt - Test Csub Special Event	VBT - Test CSUEB Special Event	H-STAFF FOR VBT	Active / In Progress	✓ Acknowledge?		Sep 18 2015	2015-AAHSWZ	Carter, Ruth
Vbt - Test Non-csub Special Event	VBT - Test Non-CSUEB Special Event	VBT-0124	Active / In Progress	✓ Approve? / ⚠ Deny?	Sep 03 2015	Sep 19 2015	2015-AAHSWY	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-GROUNDS STAFF	Active / In Progress	✓ Acknowledge?		Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test-concert Non-csub	Test-Concert Non-CSUEB	H-GROUNDS CLEANUP	Active / In Progress	✓ Acknowledge?		Sep 25 2015	2015-AAHSXF	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-BBQ	Active / In Progress	✓ Acknowledge?		Sep 25 2015	2015-AAHSXE	Carter, Ruth
Test - Csub-affiliate Picnic	Test - CSUEB-affiliate Picnic	H-TABLES	Active / In Progress	✓ Acknowledge?		Sep 25 2015	2015-AAHSXE	Carter, Ruth

Create "To Do" Task

Associated Event: **Test - Csub-affiliate Picnic**

"To Do" Name:

"To Do" Comment:

Due Date:

Assigned By: **Rios, Jose**

Assigned To: **Ramirez, Terri**

Choose from Associated Contacts...

OR

Choose from Search Results...

- Ponce, Terri
- Ramirez, Terri
- Williams, Terri

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.

Create "To Do" Task

Success!

Your "To Do" Task has been created.

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

The screenshot displays the 'Tasks Agenda' interface. At the top, there is a navigation bar with tabs: Home, Event Wizard, Events, Locations, Resources, Organizations, and Tasks. Below this is a sub-navigation bar with 'Overview of Tasks', 'Tasks Agenda', and 'Advanced Task Search'. The main title 'Tasks Agenda' is prominently displayed with a clipboard icon. The calendar view shows dates from Wednesday, September 9th to Sunday, September 13th. A task is listed for Sunday, September 13th, titled 'Ath - Test Non-csueb Special Event' at the STADIUM, with a setup duration of 8:00 AM - 9:00 AM. A list of tasks is shown on the right, including 'My tasks...', 'H-ATHLETIC STAFF', 'H-CUSTODIAL STAFF', 'H-GROUNDS STAFF', 'H-STADIUM LIGHTS', 'H-UNIV. POLICE OFFICER', 'STADIUM', and 'UU-2003'.

Tasks Agenda (continued)

Another view used by service providers:

Dates: ◀ Sun Sep 13 2015 ▶

September 13

To Do Tasks	
0:00 AM	
1:00 AM	
2:00 AM	
3:00 AM	
4:00 AM	
5:00 AM	
6:00 AM	
7:00 AM	
8:00 AM	<div style="background-color: #f9e79f; padding: 5px; margin-bottom: 5px;">Setup duration: 8:00 AM - 9:00 AM</div> <div><div style="display: flex; align-items: flex-start;"><div style="margin-right: 10px;"><div style="color: green; font-weight: bold;">●</div><div style="color: blue; font-weight: bold;">Ath - Test Non-csueb Special Event</div></div><div style="margin-top: 5px;"><div style="color: blue; font-weight: bold;">● STADIUM</div></div></div><div style="margin-top: 5px;"><div style="display: flex; align-items: flex-start;"><div style="margin-right: 10px;"><div style="border: 1px solid #ccc; padding: 2px 5px;">My tasks...</div></div><div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-ATHLETIC STAFF</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-CUSTODIAL STAFF</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-GROUNDS STAFF</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-STADIUM LIGHTS</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-UNIV. POLICE OFFICER</div><div style="border: 1px solid #ccc; padding: 2px 5px;">STADIUM</div><div style="border: 1px solid #ccc; padding: 2px 5px;"><div style="background-color: #ccc; width: 10px; height: 10px; display: flex; align-items: center; justify-content: center;"><div style="width: 0; height: 0; border-left: 5px solid transparent; border-right: 5px solid transparent; border-bottom: 8px solid #ccc;"></div></div> UU-2003</div></div></div></div></div>
9:00 AM	
10:00 AM	
11:00 AM	
12:00 PM	
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	
6:00 PM	
7:00 PM	<div style="background-color: #f9e79f; padding: 5px; margin-bottom: 5px;">Takedown duration: 7:00 PM - 9:00 PM</div> <div><div style="display: flex; align-items: flex-start;"><div style="margin-right: 10px;"><div style="color: green; font-weight: bold;">●</div><div style="color: blue; font-weight: bold;">Ath - Test Non-csueb Special Event</div></div><div style="margin-top: 5px;"><div style="color: blue; font-weight: bold;">● STADIUM</div></div></div><div style="margin-top: 5px;"><div style="display: flex; align-items: flex-start;"><div style="margin-right: 10px;"><div style="border: 1px solid #ccc; padding: 2px 5px;">My tasks...</div></div><div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-ATHLETIC STAFF</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-CUSTODIAL STAFF</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-GROUNDS STAFF</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-STADIUM LIGHTS</div><div style="border: 1px solid #ccc; padding: 2px 5px;">H-UNIV. POLICE OFFICER</div><div style="border: 1px solid #ccc; padding: 2px 5px;">STADIUM</div><div style="border: 1px solid #ccc; padding: 2px 5px;"><div style="background-color: #ccc; width: 10px; height: 10px; display: flex; align-items: center; justify-content: center;"><div style="width: 0; height: 0; border-left: 5px solid transparent; border-right: 5px solid transparent; border-bottom: 8px solid #ccc;"></div></div> UU-2003</div></div></div></div></div>

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