Setting Up a View for Backup Space Schedulers

The new security framework set up for Resource25 requires single person security profiles and only one person set as the overall space approver for each space. The security framework allows multiple security profiles with space assignment privileges. This security setup allows those users with assign/unassign privileges to assign spaces for a primary approver when they are out of the office. The official space approver is the only person that receives workflow on requests for a space. In order for other assigners to see these requests, they must set up an alternate workflow view to examine the official approvers workflow for new requests. This document explains how to set up a view of another Resource25 users workflow.

First, click on the Workflow title as indicated in the screen capture below.

A new workflow task list will open. First, make sure that the View description reads (none). The (none) designation indicates that you will be building a new workflow view. Next, click the Show button to display the Task List setup window.
The Task List setup window allows you to customize a task list to view specific items or workflow assigned to or by a specific person or group of persons. Once the window illustrated below is displayed, double-click the To (1) item in the Assigned folder. Before you take this step, the workflow is automatically set to view items assigned to you.

After you have double-clicked the To (1) item, a Select Contacts window will open displaying your name as the selected contact. The first thing you want to do in this window is double-click your name. This will remove your name as a selected contact for this workflow view.
Next, locate the text box immediately below the **Find: Starts With** drop-down box. You will use this field to enter the **Last Name** of the person whose workflow you want to view.
Once you hit the **Enter** key on your keyboard or click the **Go** button, Resource25 will search for all contacts in the contact directory with the last name indicated. In the screen capture below, the Last Name of **McKenzie** will be the search name.

Once the search is complete, locate the contact listed that will be the focus of your workflow view. **Double-click** the name of that person to place them in the **Selected** pane of the window. You may also click once on the name of the contact and click the **Add** button to place the contact in the selected pane of the window. Once you have selected the name, click the **OK** button. The workflow view will now be looking at all workflow **assigned to** Amy McKenzie.
Your next step is to tell Resource25 what workflow items you want to search for with this view. Make sure that each of the Search For checkboxes are checked. These choices will ensure that the view will search for Outstanding, Approved/Completed, Denied/Declined, and Cancelled items in the other users workflow. Note that you could mark the view to search only Unread items in the other users workflow. However, it is wise to leave this item unchecked since the other user might have read a workflow item but not completed the approval process before they left campus.
Next, you will indicate the **due dates** that you want the workflow to search. For this view (typically associated with vacations), leave the **Today** days set to zero and set the **Within** days to seven.
Now you will want to test your search to make sure everything is working. Remember that if the person in question has completed all workflow prior to leaving campus, the search might return no entries. As illustrated below, cancelled items will be indicated with the red slash symbol and will be struck through. Already approved items will be indicated with a check mark. Items awaiting approval will be highlighted in red and will have no marks to the left of their assignment icon. Once you are sure the search is working as expected, click the **Hide** button to hide the setup portion of the Task List.

Now you need to save the view by clicking on the diskette icon. This will open a **Save Task View As** dialog box for you to name the workflow view. It is easiest to remember if you name the workflow for the person you indicated in the Assigned To step. Also make sure that you have checked the **Show in My R25** box in order for the workflow view to show on the **My R25** screen in the Workflow section. Click **OK** once you have named your view.
Close the workflow view to exit and return to the **My R25** main window. Look in your **Workflow** area and notice that you now have a new named Workflow view that may be clicked for viewing.

As always, should you have questions about how to set up these views or other R25 technical support issues, contact Keith Stiles at extension 3043 or via e-mail at kstiles@email.wcu.edu.