Managing Workflow in Resource25

This job aid provides the steps required for managing your workflow requests in Resource25.

Step 1. Log into ReservIt with your User Name and Password.

Step 2. Click the outstanding or unread link in the Workflow section.

The Task List window opens.
Step 3. Double-click on the appropriate request.

The *Edit Event* window and the *Edit Event – Workflow* window open.

![Image of Integrated Event Scheduling - Training Example](image)

**Note:** The *Edit Event – Workflow* window displays all of the *Tasks* related to the *Event*, as well as the names of all available *Approvers*.

Step 4. In the *Edit Event – Workflow* window, scroll right to view the *Assigned To* column.

![Image of Assigned To column in Edit Event - Training Example](image)

**Note:** To sort the *Assigned To* column, click the *Assigned To* column header.
Step 5. Scroll left ▶ and select the appropriate **Task**.

Step 6. Click the **Assign** button to approve the request.

The **Assign** window opens.
Step 7.

Update the information if necessary, and click **OK**.

The *Edit Event – Workflow* window is updated to indicate that the resource has been assigned, and the *Assignment* of the *Task* has been completed.

![Edit Event - 'Training Example' - Workflow](image)

**Note:** If this *Task* has been assigned to multiple individuals, it will be updated with a checkmark ✅, indicating that it is complete for all *Approvers*.

**Note:** To deny the request, click the **Deny** button. The denied *Task* will be updated with an ✗.

**Note:** Click the **Comments** button to add notes.

Step 8.

Close ✗ the *Edit Event – Workflow* window.
Step 9. Review the *Edit Event* window.

Step 10. Close the *Edit Event* window.

Step 11. Click at the prompt to save the changes.
Note: If the **Search!** button is clicked, the **Task List** is updated and any completed **Assignments** no longer display.
Step 12. Double-click on an FYI Notification in the Task List, if necessary.

The Edit Event window and the Edit Event – Workflow window open.
Step 13. Click the Complete button to acknowledge the FYI Notification.

The Edit Event – Workflow window is updated to indicate that the FYI Notification has been acknowledged.

Note: Click the Comments button to add notes.


Step 15. Review and close the Edit Event window.

Step 16. Click Yes at the prompt to save the changes.
Note: If the **Search!** button is clicked, the **Task List** is updated and any acknowledged **FYI Notifications** no longer display.

Note: To view items you have already reviewed and either assigned or denied, change the View to **Previous Workflow** then click the **Search!** button.