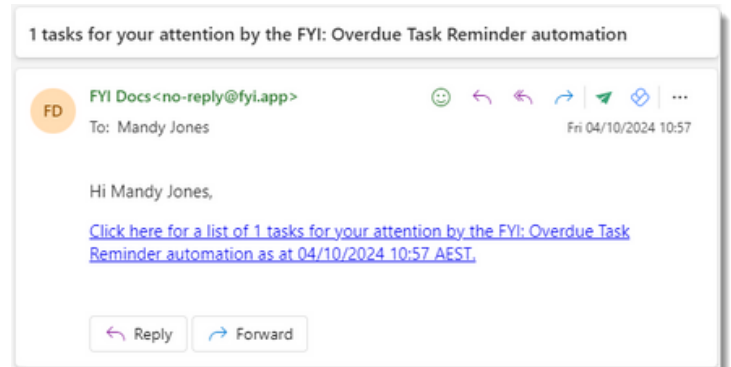


# Overdue Tasks Notification



## About this automation:

Use this process to automatically send a notification for any overdue tasks to the task delegator or task assignee.



- Simply import the sample automation, customise to suit your practice, test and activate!

## What's included:

- Automation Process Steps

**FYI: Overdue Task Reminder**

Send your team a daily summary of overdue tasks, so nothing is forgotten.

FYI Automation Summary

Message: Tasks for your attention by the FYI: Overdue Task Reminder automation

Mark as read

2 minutes ago

Details History Activity

Status: ACTIVE Test Back

Name: FYI: Overdue Task Reminder

Description: Send your team a daily summary of overdue tasks, so nothing is forgotten.

Trigger: Schedule  
Every day from 13 Sep 2024

Filter: Task - View Filters  
View: Overdue Tasks

Owner: Liz Hurst

Start From: 13/09/2024

Inherit Job: -

Last Run: Today at 08:34 for Peter Parker ✔

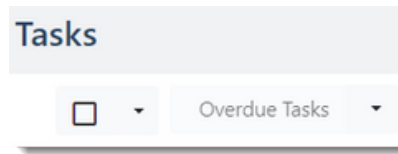
Next Run: Saturday, 5 October 2024 03:00

## How to import:

Before you begin, ensure your View have been saved in the Tasks list with the following filters:

"Overdue Tasks " View

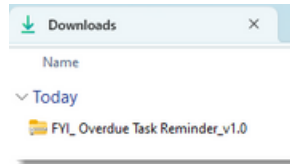
- Due Date = Relative, Past
- Status = Not Started, In Progress



### Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.

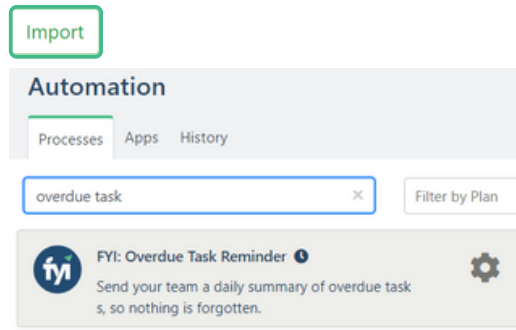


### Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Overdue Task" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



### Step 3 - Review the process

Processes are imported with the Status set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

This process uses the Overdue Tasks View, which is a system view in Tasks Lists.

- Review the schedule
- Review the process owner
- Review and update the process steps.

Step	Application	Action	
#1	FYI Actions	Summary Notification <i>Notes</i> The user notified is currently the "Task Assignee". Consider selecting a specific user to receive this notification.	
#2	FYI Actions	Summary Notification <i>Notes</i> The user notified is currently the "Task Delegator". If a specific user is selected to receive the notification in step 1, consider removing this step.	

### Step 4 - Test and activate

Click the Test button to display a list of unassigned tasks.

Search and select a specific task to run the test for and select Run Test.

Go to Home - Notifications and review the summary notification received. The notification will be sent to the assignee and/or the delegator of overdue tasks.

When ready, set the Status to Active.

- This automation is set to run automatically every day from the commencement date.
- Users can receive notifications in FYI and also via Email or Teams. This is based on the Notification Mode enabled in My Settings.

